



Publishers' Licensing Services Annual Review 2023/24

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

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

In 2023–2024 PLS distributed £44 million to over 4,500 publishers.

PLS is owned and directed by:



The Association of
Learned & Professional
Society Publishers



Introduction from the Chair

I am delighted to introduce this year's Annual Review with the news that PLS has reported a record year with gross revenues totalling £50m. This excellent outcome clearly highlights the enduring value and relevance of collective licensing in the UK.

Over the course of the year, PLS has once again worked effectively with our licensing partners – CLA and NLA Media Access – as well as our partner organisations representing authors and visual artists, to manage the exchange of rights, licensing and repertoire data – the building blocks of the system. That the model works so effectively is testament to the hard work and expertise of all involved, not least our committed and experienced PLS team.

This year we said farewell to two highly respected and much valued members of the PLS Board: Mark Majurey and Oliver Gadsby, both of whom served PLS so effectively for two full terms. In their stead we were very pleased to welcome Mark Walford and Helen Kogan who have made notable contributions so far.

This financial year will of course be remembered for a significant change in the leadership of the organisation with the departure of Sarah Faulder in October 2023 after more than 10 successful years as Chief Executive. In that time, Sarah led PLS through significant growth and development, and championed the organisation through the pandemic and a constantly changing landscape, and provided excellent leadership. I am sure all will join me in once again thanking Sarah for her enormous contribution to PLS and its work. PLS is extremely fortunate to have appointed a new Chief Executive, Tom West, who brings expertise, strong leadership experience, and a deep knowledge of the sector. The Board and team welcome Tom's appointment and his commitment and skills in leading PLS for the future.

Rosie Glazebrook
Chair





Review of the year

A Message from the CEO

As I reflect on the past year since taking over as CEO in November 2023, while my experience as PLS' Chief Operating Officer means much of the landscape is familiar, the perspective from this new vantage point has been enlightening and transformative.

You will hear more in these pages of our work with stakeholders to respond to the opportunities and threats presented by generative AI technologies, both in advocating for appropriate regulation, and – our core remit – the development of voluntary collective licensing solutions. We firmly believe that collective licensing has a key role to play to ensure that the rights of publishers and creators are respected and that they receive appropriate payment for the use of their content by AI companies and their users. But while those developments have undoubtedly kept us occupied this year, when considering PLS' performance in any given year it is inevitable, and entirely appropriate, that the main focus will be on the licensing revenue that we have paid out to publishers. I am therefore proud to report a record year – reaching £50m in gross revenues for the first time in our history, with £44m paid out over the past 12 months to publishers across all sectors.

Our compact team has been as busy as ever. In addition to the positive distribution figures, collective licensing highlights include a successful publisher consultation on a new CLA text and data mining licence and supporting the renewal of CLA NHS England and Higher Education licences – long term deals enabling these critically important sectors to access and use high-quality content and bringing welcome revenue stability for publishers.

We have worked closely with both of our licensing partners, CLA and NLA media access – both of which have enjoyed successful years, with CLA and NLA business licensing a significant factor in the revenue growth we have seen this year. I would like to extend our sincere thanks to both for their hard work on our behalf. Our PLSclear permissions clearance service continues to deliver excellent results for publishers and the users they serve; and our ongoing Rights and Licensing Hub and Access to Research initiatives continue to support our key strategic objectives in supporting copyright and facilitating access publisher content. You can read more about all of these on the next few pages.

Beyond core service delivery, industry events have once again provided several key milestones in the PLS calendar, from the London and Frankfurt Book Fairs to the excellent events run by our trade association members, and of course our first all-day conference in central London.

I would like to end with a few more words of thanks: firstly to our brilliant PLS team who have maintained a frenetic pace throughout the year, to my predecessor Sarah Faulder for her inspirational leadership of the organisation for more than a decade; and finally, to all publishers that have worked with us over the course of the year – your continued support and engagement is so very important in ensuring that we remain focused on those areas where we can best serve and support your needs.

Tom West
Chief Executive

Collective licensing

Revenue and distributions

Collective licensing remains our core focus; we are dedicated to securing the broadest possible publisher participation so that users – whether in education, corporate or the public sector – can engage fully with the rich and diverse content available to them, and that publishers receive appropriate remuneration.

2023–24 in numbers

£49.5m

Gross revenue from collective licensing was up 14% overall at £49.5m.

£44m

£44m was paid out to publishers in 2023–24.

94%

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







14,000

More than 14,000 publisher payments.

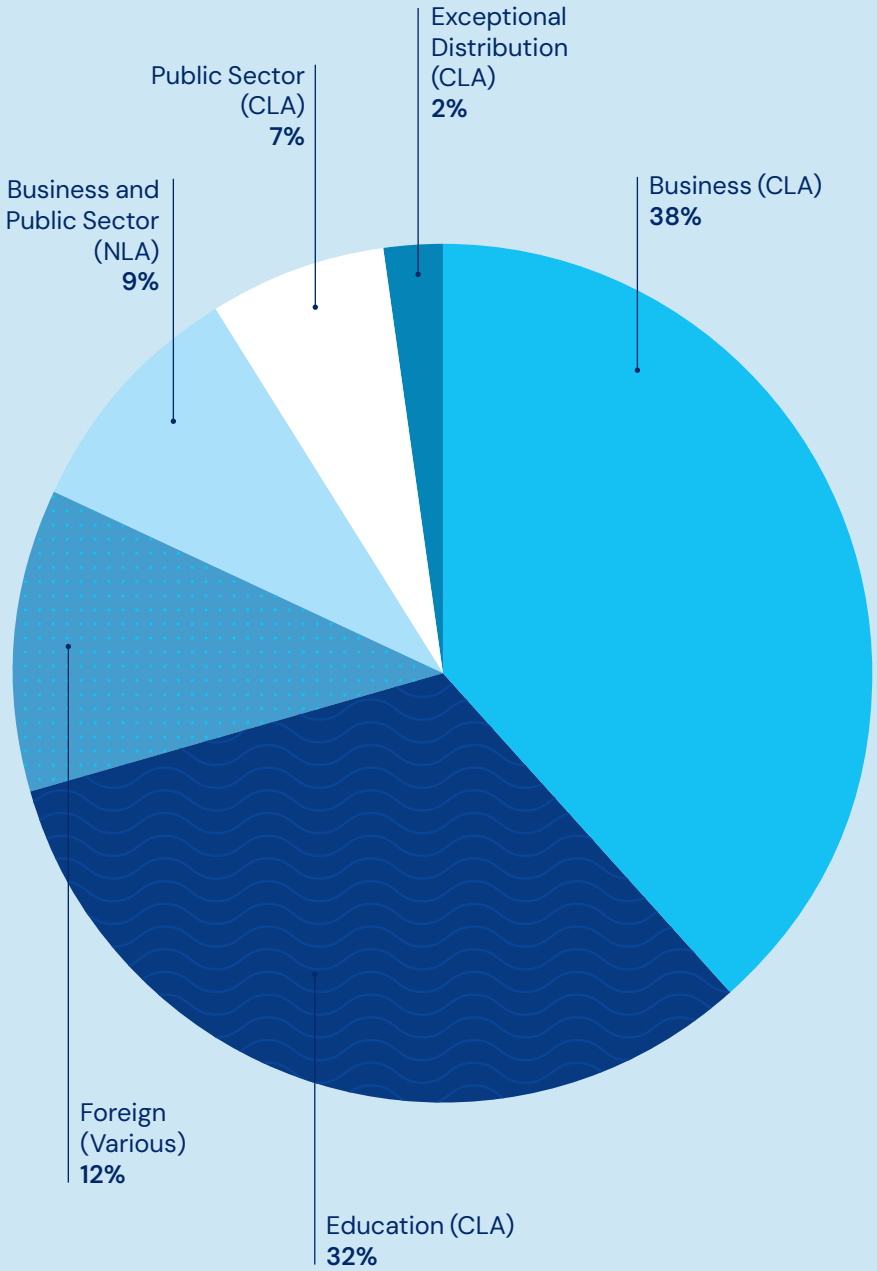
Early in the year, new 5-year agreements were signed by CLA with NHS England, Scotland and Wales, as well as with central government. This was followed by a new 3-year agreement for UK Higher Education institutions, in place from 1 August 2024. In the Schools sector, CLA introduced a new Read Aloud Licence which permits schools to produce their own recordings of books being read by teaching staff and make available for a limited 14-day period on their secure internal network. This has been launched in Wales with plans to launch in England and Scotland in due course.

Towards the end of 2023 we consulted publishers on a new CLA licence for text and data mining which is expected to launch in mid-2024. Work continued with CLA on the development of licensing solutions for generative AI.

Gross revenue from collective licensing was up 14% overall at £49.5m compared with the previous year. The most significant revenue growth was once again in the corporate sector where CLA and NLA revenues were up by 22% and 12% respectively.

Type of Use	Revenue £
 Business (CLA)	£19,030,725
 Education (CLA)	£15,932,737
 Foreign (Various)	£5,644,124
 Business & Public Sector (NLA)	£4,608,148
 Public Sector (CLA)	£3,299,905
 Exceptional Distribution (CLA)	£1,003,175

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 PLS 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.



PLSclear

Helping publishers access a growing permissions market

PLSclear is our award-winning permissions service designed to save publishers time and reduce the often admin-heavy processes associated with licensing permissions requests. Publishers opting into PLSclear make their titles instantly available to a growing global permissions market, while also benefiting from tools within the system to manage permissions more efficiently.

This year we onboarded over 50 new publishers to the platform and handled requests from users in 106 countries with 75% of traffic coming from outside of the UK.

We also delivered a major upgrade programme based on user feedback. This included a new PLSclear homepage and request form, and a new card payment interface to improve the experience for international users. We also launched a new help section with simple guidance for getting started using PLSclear and more tips and tricks for getting the most out of the system.

Publishers using PLSclear by sector

Academic	25%	Education	11%
Academic/STM	7%	Music Publishers	1%
B2B Magazine	6%	Professional	8%
B2C Magazine	5%	Trade/Consumer	37%





106

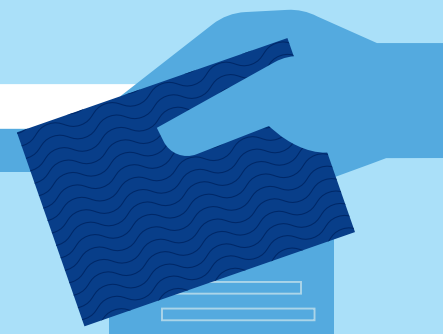
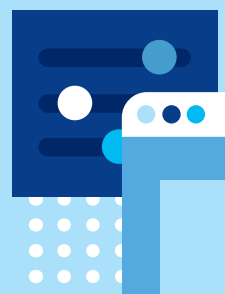
Requests came from 106 countries/
territories in 2023-24

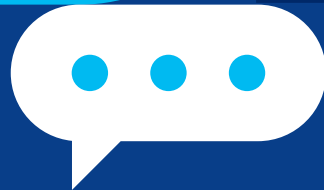
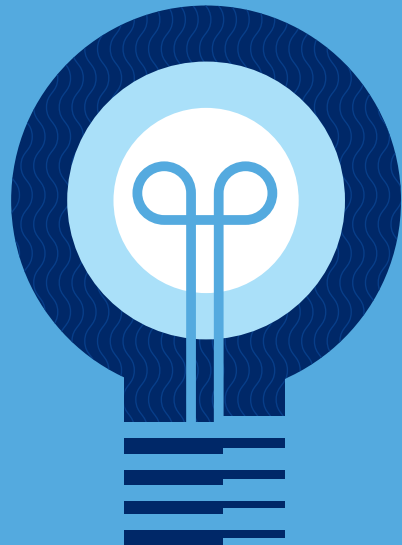
75%

of users making requests came from outside of the UK

6%

Revenue up 6% on previous year





Rights Management

Promoting the power of intellectual property rights

We have continued to develop our rights management initiatives and services. 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 providing simple and practical tutorials for publishers, agents and students.

We also hosted the annual Introduction to Rights Seminar hosted by rights experts Lynette Owen, Diane Spivey, Duncan Calow (DLA Piper) and Stephanie Purcell (Bloomsbury). This year it was hosted in historic Stationers' Hall the Monday before London Book Fair followed by a networking reception.

Rights & Licensing

Access to Research

A decade of facilitating access to world-leading academic research

With great pride, 2024 marks the 10th anniversary of Access to Research, a service that provides free, walk-in access to over 40 million peer-reviewed articles from leading academic publishers.

Whether researching local history or exploring the frontiers of health, for 10 years anyone visiting a participating public library has been able to explore the millions of academic articles available, all for free!

Created from a partnership between the Publishers Association, the Association of Learned and Professional Society Publishers and Libraries Connected, Access to Research has enjoyed, and continues to receive, strong support from both the publishing industry and UK public libraries.

Available in 99% of public libraries across the UK, the service continues to empower people from all walks of life to explore the latest cutting-edge research. In 2023-2024, the service recorded 50,000 user sessions, with just over 160,000 searches made, showing how access to reliable, in-depth, and curated information has never been more important.

PLS would like to thank everyone who has been part of this successful decade-long journey.





Special Projects

Supporting the industry through strategic partnerships

PLS is committed to supporting the publishing industry through not only effective licensing and protecting copyright, 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.



The Association of
Learned & Professional
Society Publishers

Association of Learned and Professional Society Publishers

PLS funding helped ALPSP meet demand for their Mentorloop platform that provides training to both mentors and mentees in the industry, as well as on demand training programmes accessible to all scholarly publishers across the world. In addition, PLS supported the ALPSP Careers Hub and helped the ALPSP Special Interest Group programme, which provides a space for inclusive communities working on specific areas to discuss industry challenges and help develop ideas to address them.

www.alpsp.org



Independent Publishers Guild

Support from PLS helped the IPG to extend the reach of their Centre for Publishing Excellence (CfPE) to entry level, allowing new, non-graduate pathways to the industry to be opened through the development of training content and a 'Getting Started in Publishing' toolkit. The newly extended programme provides a practical way to attract untapped talent to the industry, regardless of their economic background.

www.independentpublishersguild.com



Professional Publishers Association

PLS support has contributed to the success of the PPA's Next Gen programme, which aims to increase the amount and influence of younger voices across the special interest media sector.

PLS helped the PPA to build upon the early phase of the Next Gen programme and provide the chance for D-Studio, who won a hackathon at the 2022 PPA 30-under-30, to work on developing their winning marketing campaign brief to attract younger and diverse talent to the sector. The PPA were also able to create the Next Gen Board, an initiative that saw 16 Next Gen Board members meet for the first time on 23 July 2023 to discuss key areas such as ED&I, sustainability and the digital evolution.

www.ppa.co.uk



Publishers Association

PLS has supported the Publishers Association's crucial content protection and enforcement work. From investigation and enforcement to collaboration with industry and domestic and international law enforcement agencies, PLS funding helps support the reach and output of the PA's vital work programme.

Recent highlights of this work have included the PA assisting INTERPOL with their investigation into the Z-Library network and providing intelligence to the US Department of Justice and FBI as part of their action to arrest officials working for the network and seize 200 Z-Library domains. Within the UK, the PA has used PLS funding to apply for extensions to the UK website blocking orders.

www.publishers.org.uk



Policy

Supporting rights holders and protecting copyright

PLS has played both an active and supportive role in the industry's efforts to engage Westminster and call for greater protection of copyright. This year was the last of the 2019 parliament and on 22 May, the prime minister announced that the next general election was to take place on 4 July 2024. The 2024 General Election marks the end of a hugely turbulent parliament that has been plagued by instability, both domestically and abroad, from beginning to end. Within that policy environment, copyright has sadly remained under sustained pressure.

Over the past year, increasing evidence has emerged of widespread copyright infringement being carried out by developers of large language models and the UK government has continually hesitated to act to support rightsholders to protect their content.

With an election and potential new government now on the horizon, the uncertainty surrounding copyright looks set to continue for the foreseeable future.

After scrapping a proposal for a broad new copyright exception for text and data mining in early 2023, the government later announced that they would work to produce a voluntary code of practice for the use of copyright protected works in AI. However, despite a series of roundtable meetings convened by the Intellectual Property Office, at which a working group comprised of both rightsholder groups and AI developers, discussed the potential contents of the code, the government concluded in early 2024 that there was not sufficient agreement for the idea to be workable. The government then announced that there would be a period of ministerial-led engagement to explore alternative options, but no detail was ever given to that process. With an election and potential new government now on the horizon, the uncertainty surrounding copyright looks set to continue for the foreseeable future.

From submitting evidence to the House of Lords' Communications and Digital Committee's enquiry into large language models to meeting MPs and peers to discuss copyright and the importance of licensing, PLS has used various avenues to highlight its messaging on copyright. PLS has also been instrumental in the creation of a policy group comprising CLA and member representatives from ALCS, DACS and PICSEL. The group has worked quickly to liaise with government and highlight how collective licensing could offer a way of protecting rightsholders and facilitating access to the content needed by AI developers. PLS also continues to organise the Publishers Content Forum, a group of cross sector companies, trade bodies and collective management organisations focused on publishing, to discuss the latest policy developments.



External relations

Promoting PLS and bringing the industry together

PLS has a unique role with strong connections across publishing. We are well-placed to encourage knowledge sharing, foster cross-industry relationships, and align and coordinate messaging and engagement on the protection of copyright. To help improve the effectiveness of PLS' external relations, over the past year, PLS has worked to update and refresh our output across various formats, such as marketing materials, communications, and events. This has ultimately led to a reorganisation of those various elements and its consolidation under a single title, with Esmé Lee becoming PLS' first ever External Relations Manager. We have also been working with a design team to develop a framework for our key messaging and to create new marketing design elements. The Annual Review you are currently reading is the first use of the new designs, which will later be incorporated across all PLS marketing, including our monthly news bulletin and social media output.

In 2023, we hosted our inaugural PLS Conference on 5 July at 1 Wimpole Street, London. The event proved to be a big success and was a well-attended and well-received day of panel discussions and sessions ranging from sustainability to rights management, with the keynote provided by digital media expert, Dominic Young. In early 2024, as part of our continuing commitment to encouraging and sharing industry best practice, we also hosted the Introduction to Rights Seminar at Stationers' Hall, with instruction led by rights experts Lynette Owen and Diane Spivey.

PLS enjoyed a busy schedule of account meetings with publishers at the 2024 London Book Fair, where the Charles Clark Memorial Lecture, co-organised by PLS, saw another packed Focus Theatre receive insights on copyright and AI from Eleanora Rosati and Hayleigh Boshier. Throughout the last year we have also taken advantage of speaking opportunities at the 2023 ALPSP Conference and the 2024 IPG Spring Conference, as well as the IPG Podcast, to update publishers on important developments in licensing and the current threats to copyright.





Income and expenditure

2023/24

	2024 (£)	2023 (£)
Copyright fees received	50,207,372	44,126,301
Distributable to rightsholders	(47,487,682)	(41,788,586)
Administrative expenses	(3,017,545)	(2,658,320)
Operating surplus	(297,855)	(320,605)
Interest receivable	297,855	86,772
Surplus before taxation	-	(233,833)
Taxation	124	48,933
Surplus for the year	(124)	(184,900)
Retained earnings brought forward	822,597	1,007,249
Retained earnings carried forward	822,473	822,349

Balance Sheet

(as at 31 March 2024)

	2024 (£)	2023 (£)
Fixed Assets		
Tangible assets	10,709	3,954
Intangible assets	88,476	118,710
Investment in Joint Venture	-	5
	<u>99,185</u>	<u>122,669</u>
Current Assets		
Debtors	1,560,687	1,530,250
Short term bank deposits	4,149,313	4,082,214
Cash at bank and in hand	6,862,246	4,124,180
	<u>12,572,246</u>	<u>9,736,644</u>
Creditors: amounts falling due within one year	<u>(11,834,364)</u>	<u>(9,018,842)</u>
Net current assets	737,882	717,802
Provisions for Liabilities	<u>(14,594)</u>	<u>(18,122)</u>
TOTAL NET ASSETS	822,473	822,349
Capital and Reserves		
Profit and Loss Account	822,473	822,349

The PLS team

(as at 31 March 2024)



Tom West
Chief Executive



Danielle Williams
Executive Assistant
& Company
Secretary



Amy Ellis
Head of Rights &
Licensing



Will Crook
Head of Policy &
Communications



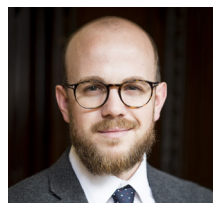
Richard Guest
Head of Distributions



**Mohammed
Anisuzzaman**
Head of IT



Katherine Wyatt
Account Services
Manager



Martin Dixon
Development &
Data Manager



Esmé Lee
External Relations
Manager



Amy Byrne
Publisher Relations
Executive



Kirsty Cassia
Account Services
Executive



**Natalia
Kornioukhova**
Product Manager



Helen Jennings
Product Manager



Carla Roda
Permissions
Executive



Caristia Villanueva
Permissions
& Operations
Administrator



Andrea Graham
Publisher
Registrations
Executive



Jamie Allerton
Publisher
Registrations
Executive



Huda Abudher
Publisher
Registrations
Administrator



Andy Martin
HR Director



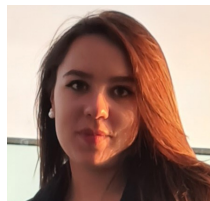
Nicola Stalley
HR Advisor



Claire Rogers
Head of Finance



Adnaan Rana
Management
Accountant



Vivienne Casey
Finance Assistant



Samehra Khan
Credit Controller

PLS Board of directors (as at 31 March 2024)



Rosie Glazebrook

Chair

PLS



Tom West

Chief Executive

PLS

PPA

Sajeeda Merali

Chief Executive
PPA

Andrew Yeates

Intellectual Property Advisor
PPA

Susan Voss

Legal & Compliance Director
Bauer Media

ALPSP

Wayne Sime

Chief Executive
ALPSP

Deborah Dixon

Editorial Director
Oxford University Press

Sarah Fricker

Senior Group Legal Adviser
Institute of Physics (IOP) group

IPG

Bridget Shine

Chief Executive
IPG

Tim Williams

Managing Director
Edward Elgar Publishing

Helen Kogan

Managing Director
Kogan Page

PA

Dan Conway

Chief Executive
PA

Andrew Freeman

Vice President,
Secondary Schools Portfolio
Pearson

Mark Walford

Executive Director,
Rights & Business Development
Sage Publications



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