

Subscribe-to-Open at The White Horse Press: Ethics Statement

The White Horse Press is committed to Subscribe-to-Open (S2O) as an equitable way of achieving Open Access without author fees.

Overview of S2O Mechanism at WHP

Each S2O journal has an annual revenue threshold.

If the journal attracts sufficient revenue to cross that threshold in a given year, all its content in that year will be Open Access under CC BY.

If the threshold is not met, we will make a judgement on whether to go ahead with the 'flip' regardless – for example if the shortfall is not significant or if it can be covered from reserve income (see bullet 'b' below).

Subscribers have exclusive access to gated backset content, if applicable (for example in *Global Environment* and *Nomadic Peoples*). They may also be eligible for additional benefits from time to time.

Setting and Reaching Thresholds

Our S2O thresholds are set (in GBP) with respect to direct production costs for each title as well as general overheads, to ensure the financial sustainability of the journals and the viability of our small values-driven family-run scholarly press. We will periodically adjust our S2O thresholds to reflect changing costs, inflation, exchange rates etc.

Income sources other than subscription revenue may be applied to the overall threshold for each journal. Other revenue may include subventions, grants, fees for licensing gated past content, etc.

Parallel Funding Mechanism for Two Journals: Projekt KOALA

In the cases of *Global Environment* and *Worldwide Waste* we anticipate that a contribution to the overall thresholds in 2025–27 will be made via Projekt KOALA.

- Projekt KOALA is a consortial open access financing mechanism for APC-free scholarly journals.
- KOALA will support *Global Environment* and *Worldwide Waste* as part of a wider themed package.
- Depending on the success of their funding programme, KOALA may be able to cover the remaining gap to threshold, if such a gap remains by 14th February of each year.
- Libraries participating in KOALA may choose whether to support these two titles via KOALA or S2O; we do not expect anyone to support via both channels simultaneously and we will work with KOALA to ensure full transparency about the parallel offers.
- This applies ONLY to *Global Environment* and *Worldwide Waste*, not any other titles.

Use of Surplus Revenue

It is evidently impractical and potentially detrimental to long-term sustainability to turn away or return 'surplus' revenue from subscriptions or other sources. If an S2O threshold is exceeded, then any 'surplus' funds will be applied as follows:

- a) For clarity, if KOALA funds are used to support *Global Environment* and *Worldwide Waste*, then no surplus is possible for those journals since KOALA will fund only up to the threshold, and not beyond. The following points therefore apply only to journals NOT funded by KOALA.
- b) Within the *Environment and Society Package*, if one or more journals has met its threshold through standalone subscriptions, but others have not, extra revenue from a more successful journal will be applied to the journals that have not yet met their thresholds. The Package does not have an 'umbrella threshold' of its own; its revenue is split 5 ways between the participating journals until any or all of them reach their title-specific threshold(s). All our titles support environmental perspectives in the HSS, and all are reputable peer reviewed journals.
- c) Any surplus revenue from non-package subscriptions, up to 10% beyond the journal's threshold, will be held in reserve to allow the journal to be Open Access in future years in which there is a shortfall.
- d) Any surplus subscription revenue beyond 10% over the threshold will be used to reduce subscription costs for existing subscribers in the following year (or to limit cost increases that might otherwise be considered necessary).
- e) Finally, any surplus revenue that cannot reasonably be deployed via one of the routes already described may be invested in improving Open Access infrastructure or relevant systems and resources. We will publish reports of any such activity on our website.