

IEA Style Guide

Guidelines on styling copy
for publications produced
by and for IEA



International Association
for the Evaluation of Educational
Achievement

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International Association for the
Evaluation of Educational Achievement

Stichting IEA Secretariaat Nederland
Amsterdam, The Netherlands



Herengracht 487, 1017 BT Amsterdam, The Netherlands

Phone +31 (0) 20 625 3625

Fax +31 (0) 20 420 7136

email department@IEA.nl

www.iea.nl

KvK 41158871

ABN-AMRO USD account 48.19.62.069

ABN-AMRO EURO account 48.19.61.968

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Introduction

The aim of this guide is to ensure that all documents (both printed and electronic) produced and published by and for the International Association for the Evaluation of Educational Achievement (IEA) are written to a consistent style, so bringing uniformity to IEA publications and aiding communication between author and reader.

Style refers to the forms of spelling, grammar, punctuation, and other elements of language and layout that a publisher or organization wants its writers to follow. These “other elements” include the following:

- Abbreviations
- Bibliographic Referencing and References
- Capitalization
- Footnotes and Notes
- Headings
- Hyphenation
- Italics
- Numbers
- Material from other Sources (Permissions and Quotations)
- Series and Lists
- Statistical and Mathematical Copy
- Tables and Figures.

This manual sets down IEA’s preferences in relation to these elements, and in relation to spelling, grammar, and punctuation. Section One of the manual provides general standards for presentation of copy for IEA publications. Sections Two, Three, and Four cover respectively spelling, grammar, and punctuation. Section Five provides guidelines on the other elements listed above, except for References Lists and Bibliographies, which are covered in Section Six. Appendices provide examples of preferred spellings, hyphenation, and abbreviations, as well as a listing of the world’s countries, with IEA’s members highlighted. The guidelines offered are not a comprehensive list of all possible variations and preference for any one feature. Rather, they provide general principles (with examples) for each. Also, the publishers or agencies responsible for producing IEA texts in published form may change some of the styling requested here (such as headings and the presentation of tables) to suit the layout determined for the published text.

The style set down in these pages aligns with that detailed in the American Psychological Association’s (APA) *Publication Manual* (5th edition, 2001), widely used around the world for English-language publications in the social sciences (see <http://www.apastyle.org/>). We strongly recommend that you use the APA manual in association with this present guide,

as the former provides considerably more detail than that given here. The APA manual also provides valuable information on:

- Types of research-based writing (e.g., literature review, theoretical article, report of an empirical study) and the conventions associated with them (Chapter 1)
- How to structure research publications (Chapter 1)
- The principles and the practice of good writing (Chapter 2).

While past authors and editors of IEA publications have elected to use either American-based or British-based language conventions, recent years have seen them increasingly using American usage in step with APA conventions. IEA therefore now adheres to American style. The standard authority on American spelling is the *Merriam-Webster Collegiate Dictionary*, which can be searched online (go to: <http://www.merriam-webster.com/>).

Other useful references include:

- *The Chicago Manual of Style* (15th edition, Chicago University Press, 2003), also searchable online. Go to: <http://www.chicagomanualofstyle.org/index.html>
- *The Oxford Style Manual* (R. M. Ritter, Ed., Oxford University Press, 2003)
- *The Oxford Guide to Style* (Oxford University Press, 2002).

Each of these provides valuable advice on writing and structuring books, articles, and reports. They also provide information additional to that in the APA manual on the following:

- Styling mathematical, statistical, and scientific copy
- Using languages other than English in English texts (including use of diacritics)
- Indexing
- Copyright and other publishing-related responsibilities.

Those of you referring to the two Oxford (UK-based) publications should continue, however, to follow US-based conventions regarding spelling, punctuation, and idiom.

The following statement from an internet website captures our intentions for this style guide.

Language is forever changing, and authoritative absolutes invariably come crashing down in the face of popular usage. These guidelines are therefore not definitive; we do not claim that they are perfect, or that they are the only possible ways of using the English language. For the time being, however, they are the principles to which we intend to conform, in the spirit of establishing standards and consistency in the absence of, or until something better comes along. We anticipate that these guidelines will change and grow over time. We welcome all feedback, suggestions, examples and topics for inclusion.

(Retrieved August 1, 2006 from <http://www.bolton.ac.uk/elab/guidelines/grammatical.html>)

SECTION ONE:

General Standards for Presenting Copy (Text)

IMPORTANT NOTE: IEA logo

You must prominently display IEA's name and logo on all publications prepared for and by IEA. Place these on the *front cover* and the *title page*. To obtain a copy of the logo and further guidance on its placement, please contact the following:

IEA Secretariat
Herengracht 487
1017 BT Amsterdam
The Netherlands
Phone +31 (0) 20 625 3625
Fax +31 (0) 20 420 7136
Email department@IEA.nl



1.1 Setting out text

The following requirements relate to both online and hard (printed out) copy.

1. Prepare copy using a clear, standard, serif typeface, preferably Times or Times New Roman, with 12 point for the body text. You can use specialist fonts for typographical, statistical, tabular, and other illustrative copy. A good typeface for tables, for example, is Helvetica.
2. Set the width between lines at either double-line spacing or 1.5-line spacing.
3. Have good margins at the top, bottom, and sides of each page.
4. Provide a header or footer on each page that gives the name of the publication, the page number, and its "stage" in the writing process (e.g., draft 1, draft 2, final copy).
5. Begin each new chapter on a new page (or as a separate file in online copy).
6. Place tables and figures on pages separate from the main body of the text (and as separate files in online copy).
7. Clearly label all online files with the title of the document, the part of the document (e.g., chapter 1), and which version (e.g., draft 1, revision 1, final copy).
8. Make sure that you remove all tracked changes and inserted comments from copy ready for print- or e-production.

1.2 Standard sections of a research report

Refer chapter 1 of the APA manual.

In order, these are:

- | | |
|---|---|
| 1. Title | 7. Method |
| 2. Author (or authors') names | 8. Results |
| 3. Abstract (journal article) | 9. Discussion |
| 4. Executive summary ("one-off" report) | 10. Conclusion and implications |
| 5. Introduction | 11. References list |
| 6. Review of relevant literature | 12. Appendix/es (rare in journal article) |

Note: The above sections are those commonly used for reporting empirical studies. Other types of research and academic writing (e.g., reviews of literature, methodological descriptions and critiques) follow somewhat different structures.

1.3 Standard sections of a book

In order, these are:

- | | |
|---|--|
| 1. Half-title (main title of book) | 7. Preface (written by the author/s, introducing the book and stating its purpose) |
| 2. Title page (Title and sub-title of book, author/s' names, publisher's imprint) | 8. Contents |
| 3. Title verso (edition information, including date of publication, copyright details, ISBN, publisher's address details) | 9. List/s of tables, figures, maps, etc |
| 4. Dedication | 10. Introduction |
| 5. Acknowledgments | 11. Chapters |
| 6. Foreword (introducing the author, and usually written by someone else) | 12. Appendix/es |
| | 13. Notes |
| | 14. References list or bibliography |
| | 15. Index/es |

Note: Not all books will include all these sections, although all will have a title page and title verso in addition to a table of contents and the chapters.

SECTION TWO:

Spelling and Vocabulary

As mentioned in the Introduction, the *Merriam-Webster Collegiate Dictionary* provides the standard spelling reference. Reference can also be made to the more comprehensive *Webster's Third International Dictionary*.

If the dictionary offers two or more spellings for a word, use the first one. English spellings are notoriously idiosyncratic, so it is difficult to provide “rules”. Although the following examples offer guidelines, there are always exceptions to each instance, which is why reference to a dictionary is so necessary.

Appendix 1 provides a list of words that further illustrate the following conventions.

2.1 American/British (UK) variations

Use:-

- **ize/iza (Am)** rather than **ise/isa (UK)** in words like standardize and standardization*
- **ye (Am)** rather than **yse (UK)** in words like analyze
- **or endings (Am)** rather than **our (UK)** endings in words like behavior
- **er (Am)** rather than **re (UK)** endings in words like center
- **e (Am)** rather than **ae (UK)** in words like encyclopedia.

Note: *If **ise/isa** forms part of an actual name, keep the original spelling (e.g., Organisation for Economic Cooperation and Development).

Another common difference between American and British spelling is the fact that many words in UK English double the end consonant before adding “ing” or “ed”, whereas American English often does not: for example, “travelled”(UK)/ “traveled” (Am). This also occurs where verbs are created from common nouns, for example, “trial” to “trialed” and “trailing”. But do not rely on these conventions in all instances. “Fulfilled”, for example, takes double consonants in both American and British spelling.

For more guidance on American-based conventions regarding spelling, refer to the following useful website: <http://www.studygs.net/spelling.htm>

2.2 Singular/Plural forms

Some examples:

appendix (<i>sing.</i>)/appendixes (<i>pl.</i>)	datum/data*
bureau/bureaus	index/indexes (for books)
census/censuses	matrix/es
criterion/criteria	medium/media*
curriculum/curricula	phenomenon/phenomena
focus/focuses	syllabus/syllabuses

Note: *Plural nouns take plural verbs (e.g., “The criteria are clear”), but there are exceptions. Data and media sometimes take singular form. “Data” is singular when used synonymously with “information”, plural when used synonymously with “facts”. The word “media” frequently takes singular form when used to encompass newspapers, television, film, etc.

2.3 Computer terminology

Computer terminology changes so quickly that deciding which words to include and which spellings (including capital letters) to use is difficult. However, use for IEA publications is as follows:

compact database	login	spell checker (<i>noun</i>)
disk	logon	usenet
download	logoff	username
email	logout	webmaster
Google (<i>noun</i>)	online	website
google (<i>vb.</i>)	program	word processor (<i>noun</i>)
hyperlink	programmer	word processing (<i>vb.</i>)
hypertext	programmed	web
internet	spell check (<i>vb</i>)	world wide web

2.4 Hyphenation

Most other spelling questions are concerned with compound words. These are two or more words written as (a) one unbroken word, or (b) a hyphenated word, or (c) two or more separate words. Should it be agemate, age-mate, or age mate? The dictionary answers many such questions (it is age-mate in this case), especially for nonscientific words. But because language is constantly expanding, especially in the physical and social sciences, dictionaries may not include an authoritative spelling for the new compounds common to these fields. If a compound is not in the dictionary, the following general principles of hyphenation provide guidelines.

- **Principle 1:** Do not use a hyphen unless it serves a purpose. If the meaning of a compound is clear, a hyphen is not necessary (e.g., least squares solution, semantic differential techniques).
- **Principle 2:** When an invented or temporary compound is used as an adjective before a noun, it is sometimes hyphenated to avoid ambiguity. For example, consider “different word lists”. Does this refer to (a) lists composed of different words, or (b) word lists that are different from other word lists? A properly placed hyphen helps the reader understand the intended meaning.
- **Principle 3:** Most adjective rules are appropriate only when the compound adjective precedes the noun. If a compound adjective follows the noun, relationships are usually sufficiently clear without the hyphen (e.g., “client-centered counseling,” but “the counseling was client centered”; “*t*-test results,” but “results from *t* tests”).
- **Principle 4:** Words formed with prefixes are usually written as one word (e.g., aftereffect, pseudoscience, underdeveloped), but some require hyphens:
 - when the base word is a capital (pro-Freudian), a number (post-2006), an abbreviation (pre-UCS trial), more than one word (non-achievement-oriented students)
 - to clarify spelling and meaning (re-pair, as in pair again; re-form, as in form again; un-ionized)
 - to avoid awkward double vowels (anti-intellectual, co-occur)
 - to avoid possible misreading (co-worker).
- **Principle 5:** When two or more modifiers (a word that tells us something more about another word) have a common base, this base is sometimes omitted in all except the last modifier. However, the hyphens are retained (e.g., long- and short-term memory; two-, three-, and 10-minute trials).

2.5 Inclusive language

Refer section 2.12 of the APA manual.

IEA is committed to reducing bias in language. The APA statement on this matter applies equally well here.

As an organization, APA [read IEA] is committed both to science and to the fair treatment of individuals and groups, and this policy requires authors of APA [IEA] publications to avoid perpetuating demeaning attitudes and biased assumptions about people in their writing. Constrictions that might imply bias against persons on the basis of gender, sexual orientation, racial or ethnic group, disability, or age should be avoided. Scientific writing should be free of implied or irrelevant evaluation of the group or groups being studied.

(Manual of the American Psychological Association, 5th ed., 2003, p. 61)

See also section 3.12 “Gender-neutral language” in this present guide.

2.6 Some commonly confused words

- **All ready/Already**

All ready means everything is in readiness. Already is an adverb that means an action is complete by or before a stated or implied time.

Everything was all ready for the picnic.

He had already made the sandwiches.

- **All right/Alright**

All right is the acceptable formal usage. Alright is a colloquial use, and is rarely used in formal writing.

- **All together/Altogether**

All together means everyone in or at the same place. Altogether means entirely.

We are all together at the party.

He is altogether mistaken in his belief.

- **Allusion/Illusion**

Allusion is the noun form of the verb “allude”. It means a “reference”. Illusion is a deceptive impression of reality.

Her allusion to the song was very appropriate.

The singing created an illusion of peace amidst the fighting.

- **Alternately/Alternatively**

Alternately means one after the other. Alternatively means instead of.

The cat carried her kittens alternately to the bushes.

You can have a swim or alternatively you can dance.

- **Ante/Anti**

These are both prefixes (used in front of other words). Ante means before, as in antebellum (of or during the period before a war). Anti means against, as in anti-smoking.

- **Biannual/Biennial**

Biannual means something that happens twice a year. Biennial means something that happens every two years.

- **Continual/Continuous**

Continual means repeated or frequent. Continuous means without interruption.

The boss reprimanded her for her continual absences from work.

We have followed the team continuously for five years.

- **Complement/Compliment**

To complement something is to make it complete or to add to it. To compliment someone is to praise them.

The shoes complemented the outfit.

She received compliments on her shoes.

- **Disinterested/Uninterested**

Disinterested means impartial, that is, without bias. Uninterested means simply not interested. However, American English generally finds it acceptable to use disinterested for both meanings.

The role of the judge is to act as a disinterested party in legal cases.

I was uninterested in the rugby game.

- **Effect/Affect**

Effect and affect can be both nouns and verbs. Effect as a noun means the result, outcome, or influence. Effect as a verb means to accomplish something or to make something happen. Affect as a noun is a clinical term used in psychology for an emotion or desire.

Affect (verb) means to have an influence on something or somebody.

What effect (*noun*) will that have on the results?

The new traffic lights effected (*verb*) a reduction in peak-hour traffic congestion on the main road north.

The clinical trials looked at seven different affects (*noun*).

The weather affected (*verb*) our ability to harvest the grapes.

- **Fewer/Less**

Use fewer for items you can count and use less for quantity.

The program has resulted in fewer students failing their examinations.

Staff take less time to administer the new test than they took to administer the previous test.

- **Imply/Infer**

To imply means to suggest or hint at something, without actually saying it.

To infer means to “read between the lines” and draw a conclusion from the evidence.

The principal’s speech implied that teaching hours would be cut.

The teachers inferred from the principal’s speech that teaching hours would be cut.

- **Percentage/Proportion**

Percentage refers to a share of 100. Proportion means a comparative part, share, or ratio of a larger whole.

A high proportion of the students—nearly two-thirds—said they enjoyed the course.

Fifty percent said they “enjoyed it very much”, and 14 percent said they “enjoyed it”.

- **Principal/Principle**

The word principal as a noun is the head of a school. As an adjective, it means most important or main. Principle (noun) is a standard, a rule, an underlying tenet, a code of behavior.

The principal (*noun*) of the school took the principal (*adj.*) role in directing the school play.

He believed in the principles of honesty and discipline.

SECTION THREE:

Grammar (some common conventions and difficulties)

This section presents several grammar-related conventions used in IEA publications. It also lists a few common errors and difficulties commonly seen in texts written for publication by IEA. To avoid lengthy explanations, we have not detailed the reasons for some of the preferred uses given here. If you want additional guidance and explanation, three excellent web-based grammar sites are:

- *Guide to grammar and writing*: <http://grammar.ccc.commnet.edu/grammar/>
- *Grammar slammer*: <http://englishplus.com/grammar/>
- *The OWL online writing lab*: <http://owl.english.purdue.edu/>

3.1 Active/Passive voice

In sentences written in the active voice, the subject forms the action expressed in the verb, and the object of the sentence receives the action. The passive voice turns this construction around.

Active: The man (*subject*) climbed (*verb*) the mountain (*object*).

Passive: The mountain (*object*) was climbed (*verb*) by the man (*subject*).

Sentences written in the active voice are more direct and often less ambiguous than are sentences written in the passive voice, and so make for clearer writing, which is why most authorities on good writing advocate active over passive constructions. However, the passive voice has its place. For discussion on this matter, refer to the grammar websites above.

3.2 Agreement (subject/verb, noun/pronoun)

- The subject and the verb must agree in number: both must be singular, or both must be plural. The same rule applies to nouns and pronouns.

The school (*subject*) is (*verb*) large.

The schools (*subject*) are (*verb*) large.

The team members (*noun*) were late for the game. They (*pronoun*) were disqualified.

- Where the subject of the verb consists of more than one item, the verb is plural:
Oregon, Illinois, and Florida (*subject*) are (*verb*) states in America.

- Collective nouns (“people”, “crowd”) are singular and so take a singular verb and a singular pronoun.
The team (*noun*) performed (*verb*) well. It (*pronoun*) looked good out on the field.
- Some words that are plural in form can be designated singular or plural, depending on sense or context.
Sense: Politics is evident in all facets of life./The politics of the issue are complex.
Context: Data is generally written as a singular entity in computer texts.
- With sentences in which parenthetical items appear between subject and verb, writers often erroneously use the plural form of the verb when it should be singular.
Amy, and also Jennifer, is (*not are*) to blame for what happened.
- In instances where two or more people or objects form a collective entity, the singular form of the verb is used.
Fish and chips is our favorite take-away.

3.3 Amount/Number

Use amount for quantity. Use number when it is possible to count the items involved.

I need a large amount of flour for the cakes.

I also need a large number of eggs.

3.4 Apostrophe

See section 4.1 under “Punctuation”.

3.5 Between/Among

Use between when the reference is to only two people, ideas, or objects. Use among if the reference is to three or more people, ideas, or objects.

We divided the food among the six groups.

We divided the cake between the two children.

3.6 Can/May

Can means to have the ability to do something. May means being permitted to do something.

Dad says I can ride my bike.

I shall ask Dad if I may ride my bike.

3.7 Compared with/to

Use “with” when comparing two things for their differences. Use “to” when comparing two things for their similarities.

Compared with urban students, rural students have more fun.

I could compare the situation to a disaster.

3.8 Different from/to/than

It is always correct to use “different from”, although American English recognizes “different than”. Note, however, that we say “similar to”.

3.9 Due to/Because of

Begin sentences with “Because of” not “Due to”. Use “due to” in sentences only if the phrase acts in the sense of an adjective (i.e., modifies a noun).

Correct: Because of the late hour, we decided not to return home.

Correct: Our delay was due to engine trouble. (Here, due to is a predicate adjective modifying “delay”.)

3.10 Each other/One another

Use “each other” in reference to two people. Use “one another” when three or more people are involved.

The two children played happily with each other.

The five classmates talked to one another.

3.11 Either/or and Neither/nor

“Either/or” and “neither/nor” are correlative conjunctions. Either always aligns with or. Neither always aligns with nor. Note that these correlative conjunctions take the singular form of the verb.

Either you or I should go.

Neither the butcher nor the baker was open.

3.12 Gender-neutral language

- **He/She/They**

If the situation involves only males or only females, use “his” or “her” as appropriate.

Every boy must go fishing at least once in his life.

Every girl wrote her name in the book.

If the situation involves males and females, use “his or her” or “they” to ensure gender neutrality.

Each student had his or her book open at page 16.

The students had their books open at page 16.

As much as possible, though, use plural nouns and pronouns in sentences to avoid awkward “he or she” constructions in situations involving both males and females.

It is up to students to decide when to do their homework.

instead of

It is up to the student to decide when to do his or her homework.

However, a singular noun with a plural pronoun is acceptable usage, but only if it does not compromise euphony and clarity.

Nobody (*singular*) has taken their (*plural*) lunch outdoors.

- **Occupations**

Within the bounds of common sense, use gender-neutral terms for the names of vocations and positions of responsibility, e.g., businessperson, chairperson (or chair), fire officer, humankind, salesperson, waiter (*not* waitress).

3.13 Modifiers

Modifiers are words or groups of words that tell us something more about other words or groups of words. Two common difficulties with modifiers follow.

- **Dangling Participle (or modifier)**

Verbs ending in “ing” are participles. A dangling modifier makes for an unintended and often humorous sense in a sentence, as in, “While baking the buns, the clock chimed the hour.” Presumably, it is not the clock that is doing the baking, but the baker. The point here is that the subject of the verb must be explicit: “While the baker (*subject*) was baking the buns, the clock chimed the hour.”

- **Misplaced Word or Phrase**

When using a single word as a modifier, its placement must relate clearly to the word/s it is to modify. The words “only” and “nearly” provide typical examples. Consider the difference in the sense of these sentences:

- We nearly lost all our possessions in the fire.
- We lost nearly all our possessions in the fire.
- She sings operatic arias on Saturdays only.
- She sings only operatic arias on Saturdays.

The same principle applies to phrases. Consider these sentences containing the phrase “with a laugh.”

- She suggested what I should do with a laugh.
- She suggested with a laugh what I should do.

3.14 Not only/but also

Here, the arrangement of words that follows the first of these paired conjunctions (i.e., “not only”) must parallel the second (“but also”).

Incorrect: The new day brought not only sunshine, but it also brought strong winds.

Correct: The new day brought not only sunshine but also strong winds.

3.15 Preposition (ending sentence with)

Prepositions are words, mostly short ones, which show how words relate to one another (e.g., for, by, up, under). Some grammarians still claim that a sentence should never end with a preposition, but this rule can result in very awkward, pedantic sentences. It is therefore acceptable to place prepositions at the end of sentences whenever euphony and common sense indicate this is the best choice.

3.16 Prior to/Before

“Prior to” is similar to “due to” (see above). Unless “prior to” acts as a predicate adjective in a sentence, use “before”. As with “due to,” do not begin a sentence with “prior to.”

3.17 Provided/Providing

“Provided” is the past participle of the verb provide. It is also a conjunction meaning “if”. “Providing” is the present participle of the verb provide. “Providing” often is used incorrectly as the conjunction.

Correct: You may go out this evening, provided you have cleaned your room.

3.18 Redundancy

A redundancy is a word or phrase that unnecessarily repeats what already is written, sometimes to the point of absurdity.

We campaigned vigorously for freedom and liberty (*either freedom or liberty, not both*).

3.19 Split infinitive

The infinitive is the “to” form of the verb (e.g., to run, to jump, to be). Splitting the infinitive refers to placing a word, usually an adverb, between “to” and the verb, as in “to quickly go.” Many people would immediately amend this to read, “to go quickly.” However, the rationale for condemning the construction is based on a false analogy with Latin. If splitting the infinitive makes for the clearest mode of expression, it is acceptable. Be wary, though, of inserting more than one word between the “to” and the verb, as this can make for an awkward, ill-sounding construction.

3.20 That/This (as vague referents)

Writers frequently use “that” or “this” in sentences without making clear what each word refers to (its antecedent). Failing to provide the referent can make for vague or ambiguous meanings.

3.21 That/Which/Who

These are relative pronouns. In modern speech, *that* normally refers to “things”, but can refer to a class or type of person; *who* refers only to “people”; and *which* refers to “things”.

Today, “that” often is used in a restrictive sense and “which” in a non-restrictive sense. The restrictive sense signals information that is essential to identifying a noun or the meaning of the sentence. The non-restrictive sense presents information that is not essential to identifying a noun or the meaning of the sentence. The first example below identifies a particular fox. The second example simply provides extra information about the fox. Note that with the non-restrictive use, a comma comes before “which”.

Restrictive: This is the fox that caught the chickens.

Non-restrictive: The fox, which caught the chickens, is in the woods.

SECTION FOUR:

Punctuation

For general and additional guidance on punctuation, see one of the grammar websites listed under Grammar (Section Two) of this guide and/or refer to Chapter 3 of the APA manual.

4.1 Apostrophe

The apostrophe has several purposes, but the two main ones are:

1) To show possession in nouns

Add an apostrophe and the letter “s” after all singular nouns and after plural nouns that do not end in “s”:

The girl’s cat
The children’s books
The women’s room

Add an apostrophe but do not add “s” after plural nouns ending in “s”.

The boys’ boat
The Browns’ holiday home

2) To form contractions of words

“Cannot” to “can’t”
“They are” to “they’re”
“It is” to “it’s”

Note:

- The possessive pronouns (“his”, “hers”, its”, “ours”, yours”, “theirs”, and “whose”) never take an apostrophe. One of the most common errors in this regard is to confuse the possessive pronoun “its” with the contraction “it’s” (for “it is”).
- Do not use apostrophes for proper nouns that are used adjectively (in relation to a noun):
Keller plan
Tyler evaluation model
Penguin books
Tinbergen model
- Do not use the apostrophe for the plural of abbreviations:
MPs, 1990s, mind your ps and qs

4.2 Brackets and parentheses

- **Order**

Use **brackets** [] to enclose parenthetical material that is already within **parentheses** ():

(The results for the mature-age students [$n = 20$] are given in Table 2.)

However, do not use brackets if the material can easily be offset with commas:

(as the study by Cassidy, 2006, established)

Braces { } can also be used if further offsetting is needed.

The full scheme is ([{ }]).

In mathematical material, the placement of brackets and parentheses is reversed, that is, the parentheses sit within brackets [()].

Use brackets for editorial interpolations in text that is taken from another person's writing.

"The work she had done analyzing the results throughout that long summer had all come to nothing [or so she thought at the time] and was one of the reasons for the events that followed" (Hames, 1998, p. 54).

- **Punctuation with**

A full point (period) should come before the closing parenthesis if the whole sentence is in parentheses; otherwise, it should come after the closing parenthesis. Commas should occur after the closing parenthesis.

Forelli insisted on rewriting the paragraph. (I had encountered this intransigence on another occasion.)

The driver glanced in his rear-view mirror to observe the passenger (the one in the derby hat).

Here he gives a belated, though stilted (and somewhat obscure), exposition of the subject.

Although she rejected his first proposal (she could not have done otherwise without compromising her basic position), she made it clear she was open to further negotiations.

Colons and semicolons always appear *after* parentheses.

4.3 Colon

Use a colon:-

- Between an introductory clause that is grammatically complete (could stand as a sentence) and a final phrase or clause that builds on or extends the preceding thought.

I had two tasks to complete before the end of the day: a tidy-up of my office and taking letters to the post box.

- In ratios and proportions

The proportion of solid to liquid was 1:3

4.4 Comma

- **In Lists**

In a list of items or in a series of phrases of which the last is introduced by “and” or “or”, use a comma before the “and” or “or”. This use of the comma is known variously as the serial, list, and Oxford comma.

The sample included students from Year 1, Year 2, and Year 3 classes.

Many of the schools found it difficult to find money for new computer equipment, to meet their staff’s requirements for professional development in ICT, and to consult widely with their communities about which technology to bring into the school.

- **With Abbreviations**

Follow the abbreviations “e.g.” and “i.e.” with a comma. If the abbreviation is set parenthetically within a pair of commas, spell out the abbreviation: “to go, for example, from A to B”.

4.5 Dash

IEA uses the em rule for a dash (see section 4.8 “Hyphen, en rule, and em rule” below). The dash serves several purposes, one of which is to indicate a sudden interruption in the flow of a sentence. Use it sparingly.

I was hanging out the washing—late in the day it was—when a stranger entered my garden.

4.6 Ellipses

To show missing words in quoted text, use three equally spaced full points. If the omission follows a complete sentence, use the normal full stop at the end of the sentence, followed by three equally spaced full points.

“In time, we consider it will be possible to reach consensus. ... However, what we will need to do in the meantime is ... remain steadfast.”

Use three equally spaced points to indicate a “trailing away.”

“I don’t really know, but ...”

4.7 Period (full point)

Use a period to end a full sentence. For other uses of periods, see sections 4.9, 5.1, 5.4, 5.7, 5.11, and 6 of this manual.

4.8 Hyphen, en rule, and em rule

IEA uses these as follows.

- **Hyphen**

The **hyphen** (-) connects words or parts of words in various ways to make compound words.

the policy-making process, re-enter, school break-up, long- and short-term memory, 16-year-olds, director-general, self-esteem, decision-maker

Do not make compounds involving adverbs:

Correct: Mason Street is badly lit.

Correct: This story is well known.

Note: For more guidance on hyphenated words, see section 2.4 above and Appendix 2.

- **En Rule**

The **en rule** (–) is approximately twice as long as a hyphen. The en rule has the sense of “to” or “and” when used to connect words and numbers.

The Paris–Moscow train

For examples, see pages 16–20

During the period 1990–2000

Use it also for page numbers cited in bibliographic references.

... *Journal of Behavioral Science*, 3(4), 31–55.

- **Em Rule**

The **em rule** (—), which is twice as long as the en rule, acts as a dash, closed to the words either side of it (i.e., no space before and no space after the words).

I was minding my own business—or not, as my neighbor would say!

4.9 Quotation marks

- Use double quotation marks always, except for quotations within quotations, where you should use single quotation marks (this is their only legitimate use).
- In conventional American order of punctuation, commas and periods are set before adjacent closing quotation marks.

The board member replied, "There is no reason to doubt the president's statement."

I have just read, "A Good Man Is Hard to Find."

We asked them to sing "Somewhere over the Rainbow."

See immediately below Brighton's comments on "political expedience," which I discuss further in chapter 10 of this book.

- However, if the comma or period relates to just one word set in quotation marks, place it outside the closing quotation marks.
"Fulfilled", for example, takes double consonants in both American and British spelling.
- Place other punctuation (e.g., colon, semicolon) outside the quotation marks unless it is part of the quoted material.

4.10 Semicolon

Use a semicolon to:-

- Separate two independent clauses that are not joined by a conjunction:
The time was right; it was definitely right.
- Separate items in a series that already has commas:
We bought apples, pears, and bananas; potatoes, beans, cabbage, and carrots; and meat, milk, and cheese.

4.11 Slash (also called a virgule, solidus, shill)

Use a slash to:-

- Clarify a relationship:
The 2005/2006 financial year
- Separate numerator from denominator:
 X/Y
- To indicate "per" in units of measurement accompanied by numerals:
8.6mg/kg

4.12 Punctuation in abbreviations

See section 4.4 above and section 5.1 “Abbreviations” below.

4.13 Punctuation in equations

As a general policy in scientific copy, it is better to over-punctuate than to run the risk of leaving the reader in any doubt as to the sense of a passage. This practice applies particularly to texts with a high density of formulas. All equations should belong in some sense or other to a sentence in the text, and you should punctuate the sentence accordingly, and correctly. For aesthetic reasons, however, the equation itself will not be end-punctuated.

The quantity x can then be expressed as a function of y ,

$$x = f(y)$$

4.14 Punctuation in relation to quotation marks

See section 4.9 above.

SECTION FIVE:

Other Elements

Again, this section provides some general principles only. For detailed guidance, refer to the sections of the APA manual stated in association with each element.

5.1 Abbreviations

Refer sections 3.20 to 3.29 of the APA manual.

Abbreviations encompass Latin terms (i.e. and e.g.), the names of organizations (IEA for International Association for the Evaluation of Educational Achievement), specialist terminology (STM for short-term-memory), acronyms (DNA for deoxyribonucleic acid), and units of measurement (km for kilometers).

- For clarity, use abbreviations sparingly.
- Use common sense to decide if you need to spell out (write out) abbreviations so that readers know what words they represent. In general, do not spell out abbreviations in common usage, such as a.m., p.m., but do spell out those that may be unfamiliar to readers. Appendix 3 provides a list of preferred abbreviations. The list indicates which abbreviations do not need spelling out on first occurrence, and those that generally should be spelt out on first occurrence.
- Write the full form for an organization or for specialist terminology if the expression is used only once or infrequently in the text.
- Write out “for example” and “that is” when using these terms outside parentheses; use e.g. and i.e. when inside.
- As a general principle, omit periods (full stops) in abbreviations that consist of capital initials, for example, OECD, and in abbreviations for honorifics (Mr, Mrs, Ms, Dr). Use them, however, for the initials of people’s first names, Latin abbreviations, and abbreviations used in bibliographic references.

Some Abbreviations for IEA Studies

Civic Education Study	CivEd
International Civic and Citizenship Education Study	ICCS
International Reading Literacy Study	RL
Pre-Primary Project	PPP
Progress in International Reading Literacy Studies	PIRLS
Progress in International Reading Literacy Study 2001	PIRLS–2001
Progress in International Reading Literacy Studies 2006	PIRLS–2006
Second Information Technology in Education Study	SITES
Second Information Technology in Education Study–Module 1	SITES–M1
Second Information Technology in Education Study–Module 2	SITES–M2
Second Information Technology in Education Study 2006	SITES–2006
Teacher Education and Development Study	TEDS
Teacher Education and Development Study– Mathematics Teacher Education	TEDS–M
Trends in Mathematics and Science Studies	TIMSS
Trends in Mathematics and Science Study 1999	TIMSS–1999/ TIMSS–Repeat
Trends in Mathematics and Science Study 2003	TIMSS–2003
Trends in Mathematics and Science Study 2007	TIMSS–2007
Trends in Mathematics and Science Study Advanced	TIMSS–Advanced

5.2 Capitalization

Refer section 3.12 of the APA manual.

In general, avoid overuse of initial capital letters.

Capitalize the initial letters of:-

- Words beginning a sentence.
- Proper nouns (names of people, peoples, cities, etc):
Barbara, Romanians, Beijing
- Geographical names, but only if they are part of the title of an area or a political division and are not descriptions in general terms:
South West Africa, Western Australia, the West (but southern Scotland, the south of Scotland)

- The names of periods (e.g., Carboniferous, Iron Age, Dark Ages, the Great Depression) and wars (use First World War and Second World instead of WWI, World War II).
- Major words (i.e., not conjunctions, articles, and short prepositions) in the titles of books, articles, periodicals, television programs, and the like when these titles are cited in the main body of the text:

Publication Manual of the American Psychological Association
Home and Away

- Proper nouns in the titles of books and articles listed in references lists and bibliographies:

Fraser, G. G. (2005). *King Henry VIII and his six wives*. London: Sterling Publications.

- Major words in the titles of periodicals (e.g., academic journals) in references lists and bibliographies:

Smyth, A. E. (2003). Wet days, fun games. *Journal of Playtime*, 3(4), 22–44.

Note: for more on the use of capitals in references list/bibliography citations, see section 6 of this present guide.

- Proper nouns and adjectives and nouns used as proper nouns:

Murphy's Law
Ionic Column

- Names of departments, organizations, political parties, institutions, religious denominations, and other bodies when given in full:

the Department of Engineering, Adamson University (*but* the department, the university)
the Reston Board of Trustees (*but* the board)
the Government of Fiji (*but* the government)
the Roman Catholic Church (*but* the church)

- Names of academic courses and programs when given in full:

Sociology 101
Fresh Start Program

- Trade and brand names of drugs, equipment, and food:

Vodafone
Durasteel
Wattie's Tomato Soup

- Nouns followed by numerals or letters that denote a specific place in a numbered series:
on Day 2 of Experiment 4
during Trial 5, Group B performed
as seen in Table 2 and Fig. 6
- Exact, complete test titles as published:
The Advanced Vocabulary Test
Minnesota Multiphasic Personality Inventory
Stroop Color–Word Interference Test
- Names of factors, variables, and effects (note that factor is not capitalized unless it is followed by a number):
the Activity factor (Factor 6)
- Titles and ranks only when they accompany a personal name:
King John, *but* “the king decreed ...”
Prime Minister Helen Clark, *but* “the prime minister said ...”

Do not capitalize the initial letters of:-

- Proper adjectives that have gained a common meaning:
cesarean section
- Names of laws, theories, models, and hypotheses:
law of relativity
age–stage hypothesis
- Names of effects in an analysis of variance:
a significant age effect
main effect of serial position
- Names of conditions or groups in an experiment:
experimental and control groups
subjects were divided into information and no-information conditions
- Nouns that precede a variable:
trial *n* item *x*
- Laws, theories, and hypotheses:
Gregory’s theory of illusions
the empirical law of effect

- Shortened or inexact titles of tests or titles of unpublished tests:
a vocabulary test
Stroop color test
- Words such as “test” or “scale” if they refer to subscales of tests.

Two other points:

- 1) Capitalize to avoid ambiguity. For example, the word “state” in the political/government sense (i.e., the State) may need to have a capital “S” to avoid confusion with other meanings of the word “state”. Similar examples are Radical/radical, Liberal/liberal. “Parliament” is often lower case (“parliament”), but “Commons”, “Lords”, and “House” are capitalized.
- 2) Use small even caps for abbreviations relating to time periods, notably BC and AD.

5.3 Footnotes and notes

Refer section 5.20 of the APA manual.

- Avoid footnotes to the main text as much as possible by endeavoring to work them into the text.
- Where you cannot do this, indicate them in the text by superior arabic numerals, and wherever possible, place them at the end of a sentence or phrase. Footnote indicators follow all marks of punctuation except a dash:
... using Thompson and Albert’s version of this machine,¹
- Set the notes either as footnotes at the bottom of the page or as notes in a block at the end of an article or a chapter. Another alternative is to set all the notes at the end of the book in one big block, and to have the notes for each chapter under the heading for that chapter.
- With the end of chapter and end of book options, the notes should appear under the heading “Notes”. Place them before the references list in the case of articles, and before the references list or bibliography in the case of chapters and the ends of books. If placing the notes at the end of a book that has appendices, place the notes after the appendices.
- Set footnotes and notes in a point size smaller than that used in the main body of the text.

5.4 Headings

Refer section 5.10 of the APA manual.

- Try not to use too many levels of heading, as these can give a piecemeal look to your text and produce typographical difficulties. Within this boundary, use as many headings as are needed to sensibly structure your text and point the way for readers. A general recommendation is to employ no more than five levels of heading, with three being the preferred number.
- Denote each level typographically, either using the conventions given in the APA manual or one of your own devising. If the gradation is of your own devising, make sure each level is clearly differentiated, for example:
 - **HEADING ONE**
(all caps, bold type, 16 point Times New Roman)
 - **Heading Two**
(capital letter for initial letter of each word, except for articles and small prepositions, bold type, 14 point Times New Roman)
 - *Heading Three*
(capital letter for initial letter of each word, except for articles and small prepositions, italic type, 12 point Times New Roman)
- Alternatively, set each heading in the same font, and then beside each, in square brackets, denote its order by having [H1], [H2], [H3], etc. Ensure, though, that these notations are deleted before the text is typeset ready for printing or e-production.
- Use commas, colons, and semicolons in headings as appropriate, with a space after each item of punctuation. Do not have full points (periods) at the end of headings.

5.5 Italics

Refer section 3.19 of the APA manual.

Use italics for:-

- Titles of books, periodicals, newspapers, and magazines cited in the main body of the text and in references lists and bibliographies:
My favorite book is *The Shipping News* by E. Annie Proulx.
- Genera, species, and varieties:
Ratus ratus

- To introduce a new, technical, or key term (but do not italicize the word or phrase after its first use):
The *longevity effect* is particularly evident among the inhabitants of this island.
- Letters used as statistical symbols or algebraic variables:
t test, *SEM*
- Words in foreign languages (except the names of persons and places), but not if they are in common usage in English.
- Emphasis, but do so sparingly.

Do not use italics for:-

- Titles of articles in newspapers and magazines, chapters and sections of books, book series, unpublished theses and papers, conference papers, and lectures *when cited in the main body of the text* (enclose them in double quotation marks instead).
Note: The use of italics for the titles of chapters, periodicals, and other sources in references lists and bibliographies is not always straightforward. Refer to section 6 “References Lists and Bibliographies” of this guide.
- Chemical terms (H_2O), trigonometric terms (\tan , \log), non-statistical subscripts to statistical symbols or mathematical expressions (F_{\max}), and Greek letters (β).
- Common abbreviations such as e.g., et al., i.e., ibid.
- Latin phrases in a medical context, such as “in vivo” and “in vitro”, that have become standard use in English.

Note:-

Use quotation marks, not italics, when a standard technical term is used other than in its normal sense:

The “free” electron cannot in fact escape beyond a couple of atomic radii.

The use of italics in statistical and mathematical texts is not straightforward. See section 5.10 below.

5.6 Numbers

Refer section 3.42 of the APA manual.

Numbers Expressed in Words

Some numbers are expressed in words according to general usage and the need for typographic solidity.

Use words to express:-

- The numbers zero through nine:

A total of five lists of 32 words each were presented to the children.

The subjects were six undergraduates.

The cage contained two levers.

Note: For exceptions to this rule, see “Numbers expressed in figures” below.

- Any number above or below 10 that begins a sentence:

Sixty-four items were on the list.

One hundred and six undergraduates served as subjects.

Six percent of the total responses were errors.

Note: If possible, rewrite a sentence to avoid starting it with a number.

Numbers expressed in figures

Numbers of two or more digits and numbers in technical, scientific, and statistical matter are easier to comprehend when expressed in figures. Use the following guidelines to determine appropriate forms for numbers.

Use figures to express:-

- Numbers 10 or greater: a total of 64 lists
- Any numbers above or below 10 that are units of measurement or time, abbreviated or not: were given 5-mg drug pellets daily for 3 days
- Ages: was 6 years old
- Times and dates: 8:30 a.m. on May 6, 1912
- Percentages: a total of 6 percent
- Arithmetical manipulation: multiplied by 3
- Ratios: 4:1
- Fractional or decimal quantities: a 2¹/₂-year-old; 2.54 cm
- Exact sums of money: were paid \$5 each
- Scores and points on a scale: was 4 on a 7-point scale
- Actual numerals: the numerals 1–6
- Page numbers: on page 2
- Series of four or more: 1, 3, 5, and 7
- Numbers grouped for comparison: Of the 40 trials, 6 were ...
- Within a sentence or a series of related sentences if any one of the numbers is 10 or more (let clarity be the guide in applying this rule): Included in the 14-pair list were 7 nouns, each occurring in 2 pairs, and 14 adjectives, each occurring in 1 pair.

Note: If figures and words appear together, try recasting the sentence: “The group had 48 men and 38 women” is better than “Forty-eight men and 38 women were in the group.”

Ordinal Numbers

- Treat ordinal numbers as you would cardinal numbers: the fifth list for the first-grade students; the 75th trial (or Trial 75)
- However, present percentiles and quartiles as figures: 5th percentile; 1st quartile
- Always use words for specifying centuries: nineteenth century.

Arabic or Roman Numerals

- Because roman numerals are cumbersome and difficult to read, use arabic numerals wherever possible: Experiment 1; Group 3; Vol. 3
- However, if roman numerals are part of an established terminology, do not change to arabic numerals: Type II error; Factor I.

Commas in Numbers

- In most figures of 1,000 or more, use commas between every group of three digits in text and in tables: 1,536 items; 34,587 pellets
- Exceptions to this rule are page numbers, binary digits, serial numbers, degrees of temperature, acoustic frequency designations, degrees of freedom, and numbers to the right of a decimal point.

Decimal Fractions

- A zero is used before the decimal point in decimal numbers less than one (e.g., $p < 0.05$ $r = 0.82$).
- Use decimal fractions instead of mixed fractions (6.25, not $6\frac{1}{4}$) unless mixed fractions are more appropriate (e.g., a $3\frac{1}{2}$ -year-old).

Dates

Change terms such as 90s, 90’s or nineteen-nineties to 1990s. Delete time-related expressions such as “recently,” “currently,” “still,” and “hitherto,” or substitute absolute time indications, such as “in the early 1980s”.

In text, write “from 1950 to 1966” rather than “from 1950–66.” However, if you write the date in parentheses, the form (1950–66) is acceptable.

5.7 Units of measurement

Refer sections 3.50 and 3.51 of the APA manual.

IEA uses the metric system in its publications.

- As much as possible, express all references to physical measurements in metrics.
- In instances where the instruments used recorded measurement in non-metric form, give the non-metric form, followed by the metric equivalent in parentheses.
- Use the abbreviation for a measurement when it appears with a numeric value (e.g., 10 m), but spell the unit out when it does not (e.g., “covered several meters”).
- Use lowercase letters when writing out the full names of units, unless the name is in material set in capitals or at the beginning of a sentence.
- Do not use a period after a symbol, except at the end of a sentence.
- Do not make symbols of units plural.

5.8 Series and lists

Refer sections 3.33 and 5.12 of the APA manual.

- To show seriation within a sentence or paragraph, use lower case letters (roman font) in parentheses:
The children were administered (a) the test without the illustrative material, (b) the test with the illustrative material, and (c) a booklet of blank pages on which they drew their pictures.
- To show successive steps in a procedure, to list instructions, to set out conclusions, or to emphasize points, use numbers, lower case or upper case letters, or bullets to suit. Try not to overly “mix and match” these devices. Numbers are best for steps in a procedure, letters of the alphabet for conclusions, and bullets for emphasized points. You can use any of these devices for instructions, with your choice dependent on context and on placement within the text (e.g., small letters if instructions are given with a sentence; bullets if they follow a “stem statement”).
- When setting out serried items leading on from a stem statement, make sure the beginning of each item ties in grammatically with that statement. Thus:
When preparing text for publication:
 - Double space the text
 - Provide all tables and figures in separate files
 - Put your name and the page number on each page.

5.9 Source material (citing other people’s text and illustrations)

Refer sections 3.34 to 3.41 of the APA manual.

Citing the Source

- When using the work (whether textual or illustrative) of other people, you must credit the source:

Constable and Millot (2000, p. 36) claim that “with the rapid increase in new, user-friendly technologies, the paperless classroom will soon be with us.”

- Pay careful heed to copyright law when making direct use of someone else’s text (whether prose, poetry, play, film script), illustrative material, or musical score/lyrics. While permissible to use material under the auspices of “fair use,” the boundaries of what constitutes this use vary in accordance with the type of work (e.g., straight text, musical score, lines of poetry) and across jurisdictions. Ensure you are operating within these boundaries. If you are not, you must obtain written permission from copyright owners to use their material, and pay permission fees if necessary. If copyright owners require a permission note to be included with their material as it appears in the text, set it down as a footnote in your text and use the exact wording provided by the owner.

Styling Quoted Text

- Set text that you quote from other sources and that contains up to approximately 40 words in length into the main body of the text. Offset the quoted text with double quotation marks (see example under first bullet above).
- Set text of 40 words or more as a block of text indented in from the left margin. Do not use quotation marks. If the quoted text covers more than one paragraph, slightly indent subsequent paragraphs in from the first line of the first paragraph.

Paulson (2004, p. 85) recounts the changes in her community:

During the holidays, our local school used to lie vacant. Three years ago, several members of our community decided that we were wasting a useful resource. Our kids complained of boredom, wanted to go swimming, skateboarding, play ball. . . . We got in touch with the school’s board of trustees, and after much discussion, especially in relation to responsibilities and issues of safety, we all agreed that the children could use the school facilities during holiday periods, as long as adult supervision was in place.

What a summer we all had that first year we were able to use the school grounds.

- To denote text that you omit from your quoted passage, use ellipses (refer section 4.6 of this guide).

- Set down the quoted text exactly as given in the original, including any incorrect spelling, punctuation, or grammar. If these errors might confuse readers, insert the word “sic”, in italics and brackets, immediately after the error.
“Queen Elizabeth I [sic] came to the throne in 1952.”
- However, you can change the first letter of the first word in quoted text to an uppercase or lower case letter so that the quoted material better fits the sense of the text into which you have inserted the quotation. You can also change punctuation at the end of the quotation to suit the sense of the full text, and change double quotation marks to single quotation marks, or vice versa, in line with the treatment used in the main text.
- If the quote has italicized words, or if you choose to italicize some words, you must explain this emphasis. You can do this either immediately after the word/s by writing in square brackets the following: [italics added], or [italics original], or [emphasis mine], or [emphasis original].
“The pertinent point is this: Queen Elizabeth II came to the throne *the year I was born* [emphasis original].”

5.10 Statistical and mathematical copy

Refer sections 3.53 to 3.61 of the APA manual.

Because conventions regarding the presentation of statistical and mathematical copy (e.g., symbols used, font requirements, placement of items on the page) are particularly complex and involve specialist typography, we direct you to the relevant sections of the APA manual (noted immediately above). We also suggest that you refer to specialist publications in your field/area of interest where necessary.

In general, however, symbols for physical quantities are single letters of the Latin or Greek alphabets, with or without subscripts or superscripts. Use boldface italic type for vectors and use boldface sans serif italic type for tensors of the second rank. You can choose which symbols to use, within reason. Make sure you do not create inconsistencies or provide misleading notations, or any notation that could seriously complicate typesetting.

- For table headings, use capitals for the initial letters of all words (except articles and short prepositions). Punctuate as you would ordinary text, but omit the final full point (period). Place the heading under the table number. Set the number in roman type and the heading in italic.

Table 1

Analysis of Variance for Operant Conditioning

- For figure legends, use sentence capitalization. Punctuate as you would for ordinary text, and end the legend with a full point. Place the heading beside the number, with the number ending with a full point. Set the number in italic type and the legend in roman (not italic) type. For references to individual parts of a figure, use the letters a, b, c, also in plain type:

Figure 1. Enrollment in education in (a) 1984, (b) 1994, and (c) 2004.

- Set notes to tables and figures at the bottom of each table or figure, in a smaller font than that used for the main part of the table/figure. Set the three types of notes to tables and figures in the order of *general* note, *specific* note, and *probability* note (see example below). For tables and figures replicated or adapted from tables and figures in other documents, make sure to include a full source note as part of the general note. Indicate specific notes by *superior* roman letters, ^{a, b, c}. Set each specific and probability note on a new line.

Table 5

Percentage of the State Budget Allocated to Education^a

Year	Primary	Secondary	Postsecondary/ non-university	University
2001	71.5	21.7	–	6.8
2002	61.5	25.3	–	13.2
2003	57.6	27.7	1.0 ^b	14.7
2004	47.4	27.7	2.8	22.1
2005	43.7	36.1	.3	16.9

Note. From *Trends data on schools and schooling*, by J. Erewhon, 2006, Cape Town, Avencis, p. 64.

^a Data obtained from state budget of the respective years.

^b Second semester of 2003 only.

SECTION SIX:

Reference citations, references lists, and bibliographies

- *Refer sections 3.94 to 3.103 of the APA manual for citation of references in text.*
- *Refer all of chapter 4 of the APA manual for compilation of references lists and bibliographies.*

This section discusses two matters:

1. How references (attributions to information from another author or author body) should be cited in the text; and
2. How references (and other items) should be styled in the references list or bibliography.

6.1 Some general notes

- IEA uses the author/date system of referencing, and “styles” the elements of the bibliographic citations both within the text and in the references list/bibliography according to the conventions set down in the *Manual of the American Psychological Association*. These conventions are commonly referred to as the APA method of referencing.
- A **references list** contains only those bibliographic references cited in the text. A **bibliography** contains those bibliographic references cited in the text *and* references not cited in the text but read by the author as pertinent to the topic at hand.
- Irrespective of the referencing system used, each citation must contain the following elements:

Nonperiodical (book, report, monograph)

- author’s (or authors’) surname(s) and initials or the full name of an organization if it acts as an author body (e.g., Department of Foreign Affairs)
- date of publication
- title and subtitle of publication
- volume number (if applicable)
- edition number (but only if second or subsequent)
- place of publication
- publisher

Examples:

Almond, J. J., & Bolt, K. C. (2001). *Teaching today and tomorrow*. Manson, CA: Livery Publications.

Almond, J. J., & Bolt, K. C. (2004). *Teaching in the twenty-first century* (Vol. 1, 2nd ed.). Manson, CA: Livery Publications.

Part of a nonperiodical (e.g., chapter in an edited book)

- author’s (or authors’) surname(s) and initials
- date of publication
- title of chapter
- name of book’s editor or editors
- title and subtitle of publication
- volume number (if applicable)
- edition number (but only if second or subsequent)
- page numbers of book on which the article or chapter appears
- place of publication
- publisher

Example: Randolph, K. (2006). Decentralization. In J. Meakes (Ed.), *Schools around the world* (pp. 126–130). Manchester: Scholastic Press.

Periodical

- author’s (or authors’) surname(s) and initials
- date of publication
- title and subtitle of article
- title of periodical
- volume and issue numbers
- page numbers of periodical on which the article appears

Example: Martinez, V., & Fratila, J. (2001). Revisiting concerns about boys’ achievement. *Issues in Gender*, 4(6), 125–115.

Online documents/periodicals

If a document, include the same elements as for a book. If an article in an online journal, include the same items as for a periodical (or as many of these are available for each), but also including:

- the date on which you retrieved the item from internet (general article)
- the publication date given on the article (online journal article)
- the URL.

Note: If no date is apparent on the text, use n. d. (which stands for “no date”) in the usual position for the date in the reference.

Examples:

Stanton Foundation. (n. d.). *What motivates them? Mothers as student-teachers*. Retrieved November 18, 2004 from <http://www.motherhood.org>

Douglas, K. M. (June, 2003). Saying is not enough: Enhancing students' oral expression in the classroom. *Just for Teachers*, 4(6), Retrieved August 7, 2006 from http://www.justforteachers.net/subscribe_5a.html

Note:

- **Nonperiodicals** include books, reports, brochures, some monographs, manuals, and audiovisual media.
- **Periodicals** are documents published on a regular basis. They include journals, magazines, some monographs, and newsletters.
- **An edited book** is one that draws together the work of different authors under the guidance and management of one or more people who are given the designation “editor”. An “edited book” in this sense does not mean a book that is subject to copyediting.

6.2 Citations in the text

- The name/date system uses author name and date of publication to identify the work. Enclose both in parentheses if the reference is parenthetical, and place a comma between the name and the date:
... as was recently reported (Smith, 1979)

However, if the author's name belongs to the sentence, set only the date in parentheses:
Smith (1979) reports ...
- Give an author's initials in the reference in the text only if there is danger of confusion with another author of the same name. If the work is one for which a full reference is not given, initials, or indeed full names, should be retained. It is perfectly legitimate to refer to, for example, the work of Einstein, of G. B. Hardy, or of Niels Bohr.
- Distinguish several publications by the same author in the same year with lower case letters, and when citing several references in the same parentheses, order them alphabetically, separating each entry with semicolons:
(Borland, 1999a, 1999b; Emiland, 2003)
- Use an ampersand instead of “and” for citations that have two or more authors, but only if the citation is in parentheses. For citations in the text that refer to a publication by two or more authors, use “and”:
(Rachelle, Moreau, & Aspery, 2001)
Rachelle, Moreau, and Aspery (2001) confirmed that ...

- For publications with **two** authors, give both names each time you cite the reference.
- For publications that have **three, four, or five** authors, give all names on first mention in the text, and thereafter provide the first name followed by et al. (note, typed in roman, not italic, and with a period after the “al”):

First mention in text: According to Waverly, Hollywood, Russell, Demirole, and Blake (2005)...

Subsequent mentions: Waverly et al. (2005) considered that ...

Note: Omit the date if the second and subsequent mentions occur in the same paragraph as the first citation.

- For publications with **six or more** authors, give the name of the first author and use “et al.” for the first and all subsequent citations of this source.
- If citations refer to specific passages in books or articles, the correct styles are:
(Fairlie, 1997, p. 9), (Fairlie, 1997, pp. 9–23), (Fairlie, 1997, chap. 5)
- To cite secondary sources, refer to both sources in the text but include in the references list or bibliography only the source that you actually used:

Text: According to Tobias and Hanlon (2003), cited in Rabinowitz and Samuels (2006), ...

References/Bibliography: Rabinowitz, E. L., & Samuels, D. D. (2006). *School truancy: A cross-country analysis*. New York: Pendlebury Scholastic.

6.3 References list/Bibliography

Ordering

- List entries in strict alphabetical order by author name.
- Alphabetize authors’ surnames letter by letter, exactly as spelled in the text. Thus, prefixes such as de, De, van, von count only if one would not refer to the author’s surname without them. Order names starting with M[?], Mc, and Mac literally, and not as if they were all spelled *Mac*. The following list is correctly ordered:

Beethoven, L. von

de Haas, W. J.

DeShazer, L.

Hume-Rothery, W.

MacWilliam, A.

Maugham. W. S.

McAbbot, B.

Van Vleck, J. W.

Vaughan Williams, R.

- Order publications by the same author or group of authors chronologically, by year of publication. Assign letters to works published in the same year by the same author or group of authors: 1977a, 1977b, etc.
- Give all author names in the order listed on the publication. However, if the reference has **six or more authors**, give the names of the first six and then use “et al.” to denote the seventh and subsequent authors.
- Do not include honorifics with author names (Dr, Sir, Ms).
- List periodical articles and chapters within edited books under their individual authors. List the whole journal or book only if the reference in the text is to it alone. In this instance, list the journal alphabetically by its title name, and the edited book under the names of its editor(s), with the abbreviation Ed. or Eds. in parentheses after the last editor’s name.
- Note that for citations for chapters in edited books, the names of the editors are presented in the order of initials and then surname:

Aliem, D. (1995). Guidelines for safe school-yards. In M. N. Manson & R. H. M. Richards (Eds.), *The modern school* (pp. 24–35). Sydney, NSW: Botany Bay Press.

If the editors’ names begin the reference, the usual convention of initials after surnames applies.

6.4 Styling

Publishing houses and organizations differ in how they choose to order, punctuate, and capitalize the elements of bibliographic citations. APA sets out clear guidelines on its preferences. These take time to learn, especially as they can appear idiosyncratic, and even the aid of styling software, such as Endnotes, does not always guarantee exact adherence to this style. Close reference to the APA manual and to references lists and bibliographies styled according to APA preferences will help in this regard.

With APA style, the ordering, punctuation, and capitalization of nonperiodical citations differ in several respects from the ordering, punctuation, and capitalization of periodical citations. For the styling of each, see the examples in the shaded panel under “Some general notes” on pages 41–43.

- If the information in these examples does not “fit” the document you have at hand, refer to the APA manual for guidance. Examples of such documents include (among many others):
 - a newsletter article with no author
 - a report available from of the Educational Resources Information Center (ERIC)
 - an abstract from a secondary source
 - doctoral dissertations

- documents accepted for publication but not yet in printed form
- published proceedings of meetings
- unpublished documents
- personal communications (e.g., letter, email).
- Ensure that each reference citation includes the required set of elements. Do not leave off, for example, page numbers for periodical citations, and the place of publication and name of the publisher for nonperiodical citations.

Some Specific Style Points

- *Abbreviations*: Publication details such as edition number, volume, or whatever should be abbreviated following these examples:
2nd ed.; Vol. 23; Pt. 2
- *Ampersand*: Use this instead of “and” when giving authors’, editors’, and translators’ names in references lists or bibliography citations:
Chester, D. D., & Watson, X. M.
- *Capital letters*: For the titles of nonperiodicals (e.g., book title), use an initial capital letter only for words that begin the title, are a proper noun, or are used within the document with an initial capital. The same rule applies to the titles of chapters within edited books, and to articles within periodicals. The initial letters of the words of a periodical title (e.g., journal) each take a capital except for articles (the, a) and short prepositions (on, at).
- *Commas and full points*: Pay careful attention to the use of full points (periods) and commas in references citations:
 - Commas separate the names of authors even when there are only two authors:
Sutherland, D., & Gregoire, S.
 - The same rule applies to the names of editors and translators if their names begin the citation:
Brownlee, J. E., & Stephanos, S. M. (Eds.), *Cognitive development in neonates*. London: Emerald Press.
 - However, do not use commas to separate the names of two translators or two editors used further into the reference.
Remington, D. N. (2003). Neural pathways. In J. E. Brownlee & S. M. Stephanos (Eds.), *Cognitive development in neonates* (pp. 201–216). London: Emerald Press.
 - Use a full point after abbreviations, except for the abbreviations of numbers (thus, Vol., Ed., 2nd ed.), and note that the period always sits outside the parenthesis enclosing the publication date, thus:
Sutherland, D., & Gregoire, S. (2004). *Teacher talk, student talk ...*

- *Italics*: Italicize the titles of nonperiodicals and periodicals. Do not italicize the titles of chapters and of periodical articles. Italicize the volume numbers of periodicals, but not of books and reports.
- *Page numbers*: Give full page numbers: for example, pp. 712–719, *not* 712–19; pp. 54–58, *not* 54–8. Note that many electronic sources do not give page numbers. If paragraph numbers are visible, use the paragraph symbol and the number (e.g., ¶ 3). If not, give the nearest heading, and then the number of the relevant paragraph under it (e.g., Introduction, ¶ 3). If there is no discernible means of providing a location reference, omit a reference.
- *Place of publication*: It is sufficient to give one location of publication, which should be the first place listed on the title page of the book cited.
- *Publisher*: Give the publisher’s name in as brief a form as is intelligible. Delete terms like “Co.,” “Inc.,” and “Ltd.,” but retain words like “Press” and “Books”.
- *Translations*:
 - Treat a reference in a language other than English the same as you would a book in English, but match the capitalization in all titles (i.e., chapter title, article title, book title, periodical title) to the conventions of the language of the book. Provide a translation in English immediately after each title, placing it in square brackets:

Inhelder, B., & Piaget, J. (1959). *La Genese des structures logiques elementaires* [*The growth of logic in the child*]. Paris: Delachauz and Niestle.
 - Translate bibliographic information. Thus, Vol. *not* *tome* or *Band*; rev., *not* *verb*.
 - Give the place of publication in English form, but the publisher’s name as it appears in the book (but in roman font).
 - For a work that has been translated into English, follow this arrangement:

Noerr, E.R., & Ravellez, M.N. (2002). *Disquiet and displeasure* (E. Jamieson, Trans.). Palo Alto, CA: Watsford Academic Press.

Appendix 1: Examples of spelling conventions

adviser	diagramed
advisory	disc (<i>but</i> disk, computer terminology)
age-mate	dispatch
aging	
analog	e-learning
appendix	encyclopedia
	end point
analyze	enroll
antisocial	enrolling
appendices	extracurricular
artifact	extravert
audiotape	
audiovisual	favor
	feedback
Bachelor of Science, <i>but</i> bachelor's degree	flow chart
baseline	focused
behavior	
bilingual	follow-up
by-product	formulas
	framework
canceled	fulfill
caregiver	fulfillment
caregiving	
caretaker	gauge
catalog	gray
center	guideline
classmate	halfway
coeducation	half-width
collinear	homework
color	
controlled	indices
controlling	inflowing
cooperate	input
coordinate	inservice
counseling	instate
counselor	install
counterclockwise	installment
co-worker	interstimulus
crosshatched	intraspecific
cross-link	
cross-reference	judgment
cross-section	kilometer
crystallize	
cutoff (<i>noun</i>)	labeled
	labor
decision-makers	lead-in (<i>adj.</i>)
decision-making (<i>noun & adj.</i>)	leveling
defense	license (<i>noun</i>)

license (*verb*)
lifespan
lifestyle
lifelong
lifetime
loudspeaker

matrices (*math*)
medieval
meter
microfilm
mileage
misspell
misstatement
modeled
mold
moneys
multiphase

nationwide
nonsignificant
northeast

ongoing
organization
organize
outflow
output
overaggressive

percent
percentage
percentile
posttest

policy-maker
policy-making (*noun and adj.*)
practice (*noun and verb*)
pre-experimental
preschool
pretest
printout
problem-solving (*noun and adj.*)
program
programmed
pseudoscientific
psychometric

re-evaluate
re-examine

reinforced
resensitize
résumé

self-concept
self-image
semidarkness
sensorimotor
side-effect
sizable
socioeconomic
southeast
Southeast Asia
spatial
stepwise
subject-matter
subtest
superordinate
supersede
supraliminal

textbook
threshold
time frame
time lag
tie line
tire
traveling
tunneling

ultrahigh
unbiased
underdeveloped
upper-secondary school
usable
utopia
utopian

vertices

wellbeing
well-defined (*adj.*)
well-known (*adj.*)
while (*not whilst*)
worldwide

x-ray

zeros

Appendix 2: Sample hyphenated and nonhyphenated words and phrases

ability-to-follow-instructions test
above-mentioned examples
all-or-none questionnaire
amino acid compound
anxiety-playing condition

bell-shaped curve
best-fit data
best-known product
body-centered lattice
boundary-value problems

child guidance centers
child-rearing practices
classroom observation techniques
competency-based education
comprehensive high school
computer-assisted learning
criterion-referenced testing
cross-cultural education
cross-linked fibers
cross-reference
culture-free test
cumulative rating scale

day care center
draw-a-man test

early childhood education
elementary school students

family-life education
first-order transition
full-time student

grade point average

high-anxiety group
high-school teachers
higher-level cognition

lead-in
least squares solution
learner-centered approach
left-hand side

long-range order
low-frequency words
low-income groups

machine-readable form
make-up (*noun*)
man-made fiber
mental ability test
middle-class (*adj.*)
multiple-choice test
multiple-response item

non-achievement-oriented students
numerical aptitude test
open-plan school
order-of-magnitude calculation

part-time
primary-school students

role-playing technique
room-temperature experiment

school-leaving age
secondary-school teachers
self-concept
self-image
self-report

semantic differential technique
sensory-motor period
sex-linkage (*noun*)
sex-linked (*adj.*)
short-term memory
sodium chloride solution
spatial ability test
student-centered curriculum
student-paced learning aids

teacher-training college
test-wiseness
time-frame
time-lag
to-be-recalled items
trial-by-trial analysis

two-year course

two-thirds

two-metre pole

two metres

up-to-date (*adj.*)

upper-elementary schools

upper-secondary schools

water-deprived animals

well-defined (*adj.*)

well-known (*adj.*)

well-ordered (*adj.*)

widely used test

working-class (*adj.*)

work-study program

Appendix 3: Recommended abbreviations

All entries marked with an asterisk need not be spelt out at first mention. All others should be. Note that some abbreviations listed with an initial lower case letter may take a capital letter in some instances, such as Vol. (for Volume) in APA-styled bibliographic citations.

American Educational Research Association	AERA
American Psychological Association	APA
amplitude modulation	AM
anno domini*	AD (small even caps)
ante meridiem*	a.m.
antilogarithm*	antilog
approximate (in subscript)	approx
arccosecant *	arccsc
arccosine*	arccos
arccotangent*	arccot
arcsecant*	arcsec
arcsine*	arcsin
arctangent*	arctan
average (in subscript)	av
Bachelor of Arts*	B.A.
before Christ	BC (small even caps)
before present	BP (small even caps)
chapter*	chap.
chapters*	chaps.
cologarithm	colog
Company*	Co.
competency-based teaching	CET
competency-based teacher education	CBTE
<i>confer</i> (compare)	cf.
Corporation*	Corp.
cosecant*	csc
cosine*	cos
cotangent*	cot
cubic	cu
deoxyribonucleic acid	DNA
District of Columbia	DC
Doctor of Philosophy	Ph.D.
editor*	Ed.
edition*	ed.
Educational Resources Information Center	ERIC

electroencephalograph	EEG
European Economic Community	EEC
European Union	EU
English as a foreign language	EFL
English as a second language	ESL
equation*	Eqn.
equations*	Eqns.
<i>et alii</i> (and others)*	et al.
<i>exempli gratia</i> (for example)*	e.g.
experiment(al) (in subscript)	expt
exponential*	e, exp
figure*	Fig.
figures*	Figs.
gross domestic product	GDP
gross national product	GNP
hyperbolic cosecant*	csch
hyperbolic cosine*	cosh
hyperbolic cotangent*	coth
hyperbolic secant*	sech
hyperbolic sine*	sinh
hyperbolic tangent*	tanh
<i>id est</i> (that is)*	i.e.
Incorporated*	Inc.
intelligence quotient	IQ
International Association for the Evaluation of Educational Achievement	IEA
International Bureau of Education	IBE
International Baccalaureate	IB
International Council for Educational Development	ICED
International Critical Tables	ICT
International Development Research Center (Ottawa)	IDRC
International Institute for Educational Planning	IIEP
International Research Center	IRC
International Steering Committee	ISC
less-developed country	LDC
limit*	lim
logarithm*	log
logarithm (natural, base e)*	ln
Master of Arts	M.A.
maximum	max
minimum	min

National Assessment of Educational Progress	NAEP
national research coordinator	NRC
not available	NA
not determined	ND
number*	no.
observed (in subscript)	obs
Organisation for Economic Co-operation and Development	OECD
page*	p.
pages*	pp.
Part*	Pt.
Personalized System of Instruction	PSI
point	pt.
post meridiem	p.m.
Programme for International Student Assessment	PISA
Scholastic Aptitude Test	SAT
secant*	sec
section*	sect.
sections*	sects.
series*	ser.
sine*	sin
socioeconomic status	SES
square	sq
standard temperature and pressure	STP
Stanford International Development Education Center	SIDEC
stimulus-response bonds	S-R bonds
supplement*	suppl.
Système International*	SI
tangent*	tan
Teaching English as a foreign language	TEFL
total (in subscript)	tot
translation*	trs
United Kingdom*	UK
United States*	USA
versus	vs
<i>videlicet</i> (that is to say, namely)	viz.
volume*	vol.
volumes*	vols.

Appendix 4: List of countries (including IEA member educational systems)

Asterisks denote IEA member educational systems.

Note that this list does not include territories, colonies, and dependencies. For a list of these, go to: <http://www.infoplease.com/ipa/A0762461.html>

Afghanistan	Congo (Brazzaville)	Iceland*
Albania	Congo, Democratic Republic of the	India
Algeria	Costa Rica	Indonesia*
Andorra	Côte d'Ivoire	Iran*
Angola	Croatia	Iraq
Antigua and Barbuda	Cuba	Ireland*
Argentina*	Cyprus*	Israel*
Armenia	Czech Republic*	Italy*
Australia*		
Austria*	Denmark*	Jamaica
Azerbaijan	Djibouti	Japan*
	Dominican Republic	Jordan*
Bahamas		
Bahrain	East Timor	Kazakhstan
Bangladesh	Ecuador	Kenya*
Barbados	Egypt*	Kiribati
Belarus	El Salvador	Korea, North
Belgium-Flemish Community*	Equatorial Guinea	Korea, South*
Belgium-French Community*	Eritrea	Kuwait*
Belize	Estonia*	Kyrgyzstan
Benin	Ethiopia	
Bhutan		Laos
Bolivia	Fiji	Latvia*
Bosnia and Herzegovina	Finland*	Lebanon
Botswana*	France*	Lesotho
Brazil*		Liberia
Brunei Darussalam	Gabon	Libya
Bulgaria*	Gambia, The	Liechtenstein
Burkina Faso	Georgia	Lithuania*
Burundi	Germany*	Luxembourg*
	Ghana	
Cambodia	Greece*	Macedonia*
Cameroon	Grenada	Madagascar
Canada*	Guatemala	Malawi
Cape Verde	Guinea	Malaysia*
Central African Republic	Guinea-Bissau	Maldives
Chad	Guyana	Mali
Chile*		Malta
China, People's Republic of*	Haiti	Marshall Islands
Chinese Taipei*	Honduras	Mauritania
Colombia	Hong Kong, Special Administrative Region (SAR)*	Mauritius
Comoros	Hungary*	Mexico*
		Micronesia, Federated States of

Moldova	Qatar*	Tajikistan
Monaco		Tanzania
Mongolia	Romania*	Thailand*
Montenegro	Russian Federation*	Togo
Morocco*	Rwanda	Tonga
Mozambique		Trinidad and Tobago
Myanmar	Saint Kitts and Nevis	Tunisia
	Saint Lucia	Turkey*
Namibia	Saint Vincent and The Grenadines	Turkmenistan
Nauru	Samoa	Tuvalu
Nepal	San Marino	
Netherlands, The*	São Tomé and Príncipe	Uganda
New Zealand*	Saudi Arabia	Ukraine
Nicaragua	Senegal	United Arab Emirates
Niger	Serbia	United Kingdom (UK)*
Nigeria*	Seychelles	(members England and Scotland)
Norway*	Sierra Leone	United States (USA)*
	Singapore*	Uruguay
Oman	Slovakia*	Uzbekistan
	Slovenia*	
Pakistan	Solomon Islands	Vanuatu
Palau	Somalia	Vatican City (Holy See)
Palestinian National Authority*	South Africa*	Venezuela
Panama	Spain*	Vietnam
Papua New Guinea	Sri Lanka	
Paraguay	Sudan	Western Sahara (proposed state)
Peru	Suriname	Western Samoa
Philippines, The*	Swaziland	
Poland	Sweden*	Yemen
Portugal*	Switzerland*	Zaire
	Syria	Zambia
		Zimbabwe

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