## MEMORANDUM

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| TO | : | **The Directors** |
| | | Biodiversity Management Bureau |
| | | Environmental Management Bureau |
| | | Forest Management Bureau |
| | | Mines and Geosciences Bureau |
| | | |
| FROM | : | **The Assistant Secretary** |
| | | Policy, Planning and Foreign Assisted and Special Projects, and The OIC, Office of the Undersecretary for Policy, Planning and International Affairs |
| | | |
| SUBJECT | : | **ASIA-PACIFIC ECONOMIC COOPERATION (APEC) NOMENCLATURE GUIDELINES** |
| | | |
| DATE | : | **3 0 JUL 2024** |

This pertains to the electronic mail dated 18 July 2024 from Asia-Pacific Economic Cooperation (APEC) National Secretariat under the Department of Foreign Affairs, circulating the APEC Nomenclature Guidelines in preparation for the Third Senior Official's Meeting (SOM3) and Related Meetings which will be held in Lima, Peru on 24-25 August 2024.

In view thereof, please be guided of the following, which were excerpted/sourced from the <u>APEC PUBLICATION GUIDELINES (includes Publications Policy, Style Manual and Accepted Nomenclature)</u>[1]:

1) Please do not use flags, emblems or anything which may imply a "political status" of any member economy in all APEC documents.

2) In presentations, avoid maps showing borders between economies.

3) Members of APEC should be referred to as "member economies" or "members" or "economies". Do not use "state", "country", "nation" or "national" as a synonym for an APEC member economy (in most cases the latter can be substituted by "domestic" or "economy-wide").

4) Use only the accepted abbreviations and nomenclature for member economies:
- **AUS** Australia
- **BD** Brunei Darussalam
- **CDA** Canada
- **CHL** Chile
- **PRC** People's Republic of China (China also acceptable)
- **HKC** Hong Kong, China

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[1] Copy attached, and can be accessed thru: https://www.apec.org/docs/default-source/aboutus/policiesandprocedures/2023/apecpubs_guide_aug-2023.pdf?sfvrsn=9a3adb67_2

- **INA** Indonesia
- **JPN** Japan
- **ROK** Republic of Korea (Korea also acceptable)
- **MAS** Malaysia
- **MEX** Mexico
- **NZ** New Zealand
- **PNG** Papua New Guinea
- **PE** Peru
- **PH** or **PHL** The Republic of the Philippines (the Philippines also acceptable)
- **RUS** The Russian Federation*
- **SGP** Singapore
- **CT** Chinese Taipei
- **THA** Thailand
- **US** or **USA** United States
- **VN** Viet Nam

Kindly note that the term 'The Russian Federation' is to be used for all APEC meetings at and above Ministerial level. The informal 'Russia' can be used for APEC meetings below that level and also for publications.

When listing member economies in text, the names should be separated by semi-colons (e.g. Australia; Brunei Darussalam; Canada; etc). **The term 'three Chinas' must not be used**. Always refer separately to the People's Republic of China (also can be referred to as China); Hong Kong, China; and Chinese Taipei.

5) Any listing of APEC economies must also follow the above stated order.

6) Terms:
- The Senior Officials' Meetings or SOMs prepare for the annual Ministerial Meeting, which has been followed by an informal APEC Economic Leaders' Meeting since 1993. The Leaders' Meeting should not be referred to as a 'summit meeting'.
- Leaders should not be referred to as 'Presidents', 'Prime Ministers', or 'Chiefs of State', but as Economic Leaders.
- Please refer to the Chair, rather than the chairman or chairperson.
- The Executive Director heads the APEC Secretariat, They oversee Program Directors (PD) and support staff members of the APEC Secretariat.
- The term 'member economy government' may be used as appropriate.

The compliance to the current APEC style and nomenclature guidelines must be ensured, particularly by the delegates.

For your information and guidance.

**NORALENE M. UY**, *Ph.D.*

**DENR**

*1829*

Undersecretary for Policy, Planning and International Affairs <ouppia@denr.gov.ph>

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# APEC Nomenclature Guidelines

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**APEC PH National Secretariat** <apec@dfa.gov.ph>                    Thu, Jul 18, 2024 at 5:11 PM
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Dear TBAM Colleagues,

In preparation for SOM3 and other Ministerial Meetings, we wish to remind delegates of the following, excerpted/sourced from the APEC PUBLICATION GUIDELINES (includes Publications Policy, Style Manual and Accepted Nomenclature):

1) Please do not use **flags**, **emblems** or anything which may imply a **"political status"** of any member economy in all APEC documents.

2) In presentations, avoid maps showing borders between economies.

3) Members of APEC should be referred to as **"member economies"** or **"members"** or **"economies"**. Do not use **"state"**, **"country"**, **"nation"** or **"national"** as a synonym for an APEC member economy (in most cases the latter can be substituted by **"domestic"** or **"economy-wide"**)

4) Use only the accepted abbreviations and nomenclature for member economies:

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- **NZ** New Zealand
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5) Any listing of APEC economies must also follow the above stated order.

6) Terms:

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- Leaders should not be referred to as 'Presidents', 'Prime Ministers', or 'Chiefs of State', but as **Economic Leaders.**
- Please refer to the **Chair**, rather than the chairman or chairperson.

- The Executive Director heads the APEC Secretariat, They oversee Program Directors (PD) and support staff members of the APEC Secretariat.
- The term 'member economy government' may be used as appropriate.

Please ensure compliance of all delegates to the current APEC style and nomenclature guidelines.

Thank you.

Sincerely,

—

**APEC National Secretariat**
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# I. APEC Publications Policy

**(Approved by SOM, September 1998, updated October 2009)**

## 1. Objectives

### 1.1 Dissemination

The primary objective of APEC publications[1] is to disseminate information.

As an intergovernmental forum aimed at achieving trade and investment liberalization and facilitation and economic cooperation in the region, APEC makes its objectives, activities, and accomplishments as openly available and as widely known and understood as possible. One of the ways that APEC member economies and APEC fora, supported by the APEC Secretariat can do this is through a publication policy aimed at producing and distributing policy information, data and analysis for public dissemination.

APEC's publishing activities are aimed at:

* promoting a better understanding of liberalization, facilitation, and economic and technical cooperation issues;
* sharing APEC's perceptions and experience with government, public and private institutions, researchers, academic and business communities in member economies;
* stimulating broad discussion and participation in APEC's activities; and
* developing and maintaining understanding by the business sector, academics, journalists and the general public of APEC's programs and activities.

### 1.2 Cost Recovery

The APEC Secretariat provides complimentary copies of publications to member economies, APEC fora, libraries, and relevant organizations. As appropriate, however, the APEC Secretariat may charge a price for APEC publications to recover, to the extent possible, costs of production, marketing, and dissemination, based on the perceived value of the product in the market.

## 2. Responsibilities and Roles of the APEC Secretariat, APEC Fora, Project Overseer and Contractor

The APEC Secretariat vets publications for correct usage of the logo and trademarks as well as appropriate nomenclature[2] as agreed by SOM. APEC fora are responsible for approving the content of project publications and ensuring that the final material passed to the Secretariat for the purposes of production and/or distribution are in accordance with the relevant approved project proposal.

**Before printing** – Consult with the responsible Program Director at the APEC Secretariat. The project overseer (PO) [or author] is to send the **final draft** - defined as the document that has been seen and approved by the relevant forum - to the APEC Secretariat's Publishing and Brand Manager via the relevant Program Director for approval before printing a final report (either in print or multimedia format). The Secretariat will then review the design and text for compliance to APEC publication guidelines and nomenclature. Changes, if any will not affect the material's substance. The Secretariat will then return the draft with recommended changes to the PO. It is only at this stage that

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[1] These include all APEC publications intended for public dissemination, including books, research studies, working papers, conference proceedings, and basic information documents such as brochures and newsletters, in electronic or hard copy form. Documents meant for internal purposes according to APEC's access policy and not intended for general public dissemination are not covered by this publication policy.

[2] All APEC fora must comply with the approved style and nomenclature guidelines of the *APEC Publications Guidebook*.

printing can then take place. **Note that failure to adhere to the APEC Publications guidelines will delay disbursement of project funds.**

## 2.1 Checklist: Publication Production Done Outside the APEC Secretariat

Please refer to the 'APEC Style Manual and Accepted Nomenclature' (see page 6) for further details on the requirements for publication production. The following checklist summarizes the requirements to be met in publication production done outside the APEC Secretariat:

1. All covers shall carry the APEC logo, title of the conference, date(s) of the conference and of publication, and name of the APEC fora issuing the report.
2. The spine of the book shows the publication's title and year of publication.
3. The back cover should have the APEC publication number and, if required, International Standard Book Number (ISBN).
4. The names and logos of co-sponsoring organizations may appear on the cover, as appropriate, as long as they conform to the agreed APEC nomenclature.
5. The finalised text shall also conform to the accepted APEC style and nomenclature guidelines. The text should be expertly and thoroughly edited by the appropriate APEC forum. It should be sent to the Secretariat for review before it goes to print. The Secretariat reserves the right to make textual amendments to ensure it conforms to the accepted APEC style and nomenclature guidelines.

## 2.2 Checklist: Publication Production Assisted by the APEC Secretariat

The APEC Secretariat can assist APEC fora in producing their publications using relevant project funds provided from APEC Funds. In such cases, where the production is done by the APEC Secretariat, the following **additional** requirements must be observed:

1. The APEC fora or project should submit requests to their relevant Program Directors at the APEC Secretariat. Each Program Director will then consult with the Director (Communications and Public Affairs) or Publishing and Brand Manager, who is responsible for the creative development, editing and print production; assignment of catalogue numbers (ISBN/ISSN and APEC publication numbers); and submission to the library collection.
2. The Program Directors will be responsible for correspondence with the authors or coordinators for compiling of documents, budget, and distribution (mailing of the publications to the fora's contact list).
3. Final text must reach the APEC Secretariat in both hard and electronic copies at least 30 days before the intended date of publication. To ensure accuracy label electronic files with document name, version and date.
4. The finalized text should be accompanied with a complete list of copyright sources and/or acknowledgement in those instances where materials are obtained for the publication; for example, quoted passages, diagrams or tables taken from other sources. A style sheet, any photographs, figures, etc to be used in the publication must also be included with the finalized text.
5. The APEC fora will retain responsibility for the content of its publications; the APEC Secretariat will consult with the Project Overseer if any changes must be made.

A more detailed publication procedure can be found in *ANNEX 3. ANNEX 4* includes the "Guidance on Preparing Project Final Reports" [Contracting Forms & Resources, http://www.apec.org/Projects/Forms-and-Resources.aspx]

Other important considerations are listed below.

## 3. Financing of APEC Publications

- Contracting for publications are subject to APEC Financial Guidelines as contained in the Project Guidebook.
- APEC fora are responsible for the content of their publications. The Secretariat assumes that all text submitted for review by the Secretariat for correct APEC nomenclature has already been approved by the PO, and the relevant APEC fora. As noted in the standard contract and the Project Guidelines in the instance of a dispute for whatever reason the Secretariat reserves the right to retract any publication, or to decline further payments to a project.
- Publications should comply with the approved style and nomenclature guidelines of the *APEC Publications Guidebook.* **Note that failure to adhere to the APEC Publications guidelines will delay disbursement of project funds.**
- Publications will be financed by the funds approved for allocation for such publication, or financed under the budgets of the relevant APEC fora or APEC Funds.
- For APEC-funded publications, the sum approved for publications cannot be exceeded unless prior authorization has been obtained.
- All unspent funds for publications will be returned to the APEC funds.
- All revenues from publication sales must be returned to the APEC funds. Unless a prior sales agreement has been reached with publishers and distributors, and cleared with the APEC Secretariat, revenues generated by the sale of publications may not be used to defray production costs.

## 4. Translations

One objective of the APEC publication policy is dissemination. Although the official working language of APEC is English, APEC recognizes that it is useful for non-English speaking users to have access to our publications in their native language. In line with this policy, we encourage efforts by member economies to translate APEC publications into other languages. Therefore, member economies have the ability to translate and publish them as separate documents within their own economies, provided that such publication and distribution are non-profit-making.

Member economies should individually bear the cost of, and otherwise be responsible for, any such translation and distribution. Should there eventually be any profit or royalty from the sale of the publication, that profit or royalty shall be returned to the APEC Funds. Profit in the case of publications is defined as a sum exceeding the cost of production and distribution.

Each translation will require a written agreement from the APEC Secretariat. With this agreement, APEC member economies may obtain the right to make a faithful translation, with no omission or addition into a language other than English and to print a pre-arranged number of copies. No abridgments or editing of the text shall be permitted without the prior written agreement of the APEC Secretariat. For translations of APEC accepted nomenclature (e.g. the names of APEC members), the translated term should be accompanied by the English term. The APEC Secretariat reserves the right to verify the quality of all translations of APEC publications. In the event of any dispute of the meaning of the translated text, the English meaning will be referred to.

**Acknowledgements and Disclaimers** At the beginning at each translation, the following text should be printed in both English and the translated language:

*The original language of the official document [insert title of APEC publication, APEC publication number] is English. It has been translated into [insert language(s)] by [insert name of person or organization responsible] in [insert month and year], and is reproduced with the permission of the APEC Secretariat. APEC does not assume responsibility for any errors contained herein."*

All translations must also contain a statement to the effect that the publisher and/or the translator takes full responsibility for the accuracy of the translation. APEC does not assume any liability for the translation or its use. In case of any dispute, parties must note that APEC considers the text in the English language to be the final and true version.

The text shall appear on the inside (verso) of the title page of the translated edition.

The APEC style guide should apply to the translated documents from APEC publications either APEC-funded or self-funded projects.

**Dissemination** Three to five hard copies of the translated publication shall be provided free of charge to the APEC Secretariat for its archives. The translated versions will be uploaded to the APEC website if they are approved deliverables of APEC projects.

# 5.   Production of APEC Publications

APEC publications will be published in close cooperation with a commercial publisher or other such organizations. Every effort shall be made to be consistent with professional standards: the use of new technology in desktop publishing, photocopying, and electronic publishing, and all efforts shall be made, to keep the cost of printing as low as possible.

Given the distance between the APEC member economies and the highly technical nature of many of the working groups, it is sometimes desirable and cost-effective to publish some titles outside Singapore.

## 5.1   Dissemination: Print Run
APEC fora, in consultation with the APEC Secretariat, should estimate the market for their publication. As a guide please refer to the *Distribution Plan form in Annex 5*. It aims to gauge a sufficiently large print run that will account for inventory to meet estimated public demand as well as distribution to member economies, APEC study centers and ABAC.

In addition, APEC fora should also deposit **five hard copies and one electronic copy** of all publications with the APEC Secretariat for its archives. The Secretariat's Information Manager will store the publications in hard copy. Publications will eventually be electronically retrievable by APEC reference numbers. The Publishing and Brand Manager will archive the publications in Adobe Portable Document Format (PDF) in the APEC online publications database and APEC website.

The APEC Secretariat may work directly with commercial distributors, and through member economies and APEC fora, indirectly, to disseminate APEC publications.

## 5.2   Marketing and Advertising
APEC fora and APEC officials in member economies, in consultation with the APEC Secretariat, should promote the publication in relevant sectors or member economies, especially by developing a distribution network for publications, both those for sale and those distributed gratis. The Secretariat will also work together with distributors directly to establish sales agreements to promote sales/dissemination to reach the networks in different APEC economies and non-APEC countries. All revenues from publication sales must be returned to APEC funds.

# 6.   Copyright of APEC Publications

The APEC Secretariat will hold the copyright for APEC publications produced under APEC projects – this includes both APEC-funded and APEC self-funded projects. APEC is to be credited if anyone wants to quote any part of an APEC publication. The APEC Secretariat will take appropriate steps to protect and strengthen its rights to decide how work produced by APEC fora will be published, including its copyright in such materials. The rights of external

publishers with respect to an APEC publication and royalties from co-published books will be negotiable. Whenever necessary, externally published material will carry a disclaimer that the views expressed and the conclusions reached are those of the author and not necessarily the consensus view of APEC member economies.

Under the **APEC royalty policy**, that is when commercial publishers are charged a small fee for usage of APEC publications when they will be profiting from such an exercise, the following guidelines should be observed:

a. The royalty policy is meant for APEC-funded projects.
b. The publisher will be charged a flat payment rate of 25 percent of the total amount being paid out of the APEC Funds in carrying out the work. For example, a consultant is paid US$10,000 to write a report for an APEC project. Thus, if a publisher wants to reprint the report, the publisher must pay APEC Secretariat US$2,500 as a royalty payment, which will be returned to the APEC Funds.
c. In the case of reprinting through electronic means, the case will be dealt with differently in view of the nature of reproducing APEC's work as the cost will be charged towards client users for the information. A royalty payment of 35 percent of the net revenue will be made towards the APEC Funds.
d. It will be a non-exclusive right, giving the APEC Secretariat the rights to grant similar approval for other competing publishers who wish to reprint the same publication.
e. The current APEC style and nomenclature guideline apply and should be adhered to.
f. No advertisements are allowed in the commercial publication, with exception of the company logo. The company logo shown must not be bigger than ¾ of the APEC logo's size.
g. The publisher must make an acknowledgement to the APEC Secretariat to recognize APEC's contribution towards the publication.
h. The Executive Director of the APEC Secretariat reserves the right to exercise or waive the royalty payment for APEC member economies and non-profit organizations to reprint APEC's work.

# II. Style Manual and Accepted Nomenclature

(Approved by SOM, September 1998, updated October 2009, February 2012)

## 1. Definition of APEC Publications

APEC publications -in electronic or printed copy form- include books, research manuals, research studies/reports, working papers, conference proceedings, and basic information documents such as brochures and newsletters. Documents meant for internal purposes according to APEC's access policy and not intended for general public dissemination are not covered by the APEC Publication Guidelines.

APEC publications, which are outputs of APEC projects, under APEC Funds (Operational, TILF and Support Funds) in full or in part, are to comply with the APEC Style Manual and Accepted Nomenclature and Publications Policy (as noted in the APEC Publication Guidelines).

This manual and the guidelines herein are intended for all persons involved in the design and production of APEC publications to ensure that APEC publications are presented with a consistent style. Materials submitted to the APEC Secretariat for publication may, in consultation with the Project Overseer (PO) and/or author, undergo adjustments to ensure conformity

## 2. Cover Designs

**A) Report Covers, Title Page, and Verso – Printed Publications**

- All APEC publications are to have a title page and table of contents.

- **FRONT COVER** - It must have the title of the publication, the year of publication, the volume (if applicable), the APEC logo and the name of the APEC forum. The names and logos of co-sponsoring organizations, if any, may also appear on the cover, but they must conform to accepted APEC nomenclature and should be in smaller print (at least four points smaller) than the APEC acronym and logo. The **APEC logo** is available from the Publishing and Brand Manager at the APEC Secretariat in Singapore. The logo artwork and guideline files can also be downloaded from the APEC website (http://www.apec.org/About-Us/About-APEC/APEC-Logo-Use.aspx).

- The minimum elements that need to be included on a **front cover** are as follows: *(see ANNEX 1)*
    - ☑ Title of the publication
    - ☑ Month and year of publication
    - ☑ APEC logo
    - ☑ Name of the APEC Group

- **TITLE PAGES –**
    - Front Title Page – it must show the title, author (committee, working group and, if applicable, sub-group, and other APEC fora), the year of publication, and the publisher. The title page has no page number. *(see ANNEX 1)*
    - Back of the Title Page (verso) – It must contain: *(see ANNEX 1)*
        - ☑ year of publication
        - ☑ APEC publication number
        - ☑ ISBN/ISSN (not required if the report is photocopied and bound)
        - ☑ APEC Secretariat copyright rights

    ☑   Name of publisher for APEC (the author(s) who prepared the report)
    ☑   APEC Secretariat contact address

- **BACK COVER** – It must have the following minimum elements *(see ANNEX 1):*
  - ☑    APEC publication number
  - ☑    ISBN/ISSN (not required if the report is photocopied and bound)
  - ☑    APEC Secretariat copyright information.
  - ☑    Name of publisher for APEC (the author(s) who prepared the report)
  - ☑    APEC Secretariat contact address

- **SPINE** – Where possible it should show the publication's title, APEC forum and year of publication.

- **APEC PUBLICATION NUMBER AND ISBN/ISSN** – APEC publications should <u>at least have the APEC publication number</u>. The International Standard Book Number (ISBN) is also required if the report is printed by publishers or design houses. The application for both numbers is done through the Publishing and Brand Manager at the APEC Secretariat in Singapore. To expedite the process, applicants should fill-in "Annex 2 - Request for APEC publication number and International Standard Book Number (ISBN) application form". Then e-mail it with the draft report(s) to the Secretariat. Processing of the application for the ISBN/ISSN takes at least three working days. *(ANNEX 2)*

  The assignment of the *APEC Publication number* is based on seven broad categories:
  1. Special Reports, Research Studies, Surveys, Annual Reports
  2. Directories, Inventories
  3. Handbooks, Guides, Manuals
  4. Proceedings of Seminars, Conferences, Workshops, Meetings, etc.
  5. Basic Information Documents (e.g. Brochures, Newsletters)
  6. Translations of APEC Publications
  7. Multimedia (in video or CD-Rom)

## (B) Compact Disc (CD)/DVD Labels- Electronic Publications

Some APEC publications are produced in CD/DVD format. There are two broad types of CD-Rom/DVD production:
1. APEC publications which are *only* available in electronic files. <u>Guidelines in the above section A apply.</u>
2. APEC publications that involve self-executable files or media files which require to be reproduced in CD or DVD format.

The following points should be noted when preparing the CD/DVD case covers and faces:

- **CASE COVER** - It should have the title of the publication, the year of publication, the APEC logo and the name of the APEC forum. The names and logos of co-sponsoring organizations, if any, may also appear on the cover, but they must conform to accepted APEC nomenclature and should be in smaller print (at least four points smaller) than the APEC acronym and logo. The APEC logo is available from the Publishing and Brand Manager at the APEC Secretariat in Singapore. The APEC publication number and ISBN/ISSN (if applicable) should also be printed.

- If the publication is only reproduced in CD/DVD format *(see ANNEX 1)*, the minimum details that should be printed are:
  - ☑    the title of the publication
  - ☑    the year of publication
  - ☑    the APEC logo
  - ☑    the name of the APEC group
  - ☑    the APEC publication number and, if applicable, the ISBN or ISSN
  - ☑    the Contact details of the APEC Secretariat

- If the CDs/DVDs are replicated in-house and not professionally by vendors, an ISBN/ISSN is not required.

## (C)  Design Templates

There are two kinds of cover design templates *(see ANNEX 1)* for project use:

- covers done by printers or publishing houses
- covers done in-house (e.g. by word processing)

Artwork files for all cover designs can be obtained from the Publishing and Brand Manager at the APEC Secretariat in Singapore. Kindly email rbt@apec.org quoting your APEC project number as reference.

# 3. APEC Style Guide

A general principle in APEC publications is that style and formatting should be applied consistently within articles, though not necessarily throughout a publication. Consistency within articles promotes clarity and cohesion. Important nomenclature to note are marked with asterisk (*).

### Accepted Abbreviations and Nomenclature for Member Economies *

When using members' names in text and at meetings they MUST be listed in the following order in lists, tables and graphs or when organizing seating around the table or). The following names, and where applicable, abbreviations are to be used:

| | |
|---|---|
| AUS | Australia |
| BD | Brunei Darussalam |
| CDA | Canada |
| CHL | Chile |
| PRC | People's Republic of China (China also acceptable) |
| HKC | Hong Kong, China |
| INA | Indonesia |
| JPN | Japan |
| ROK | Republic of Korea (Korea also acceptable) |
| MAS | Malaysia |
| MEX | Mexico |
| NZ | New Zealand |
| PNG | Papua New Guinea |
| PE | Peru |
| PH or PHL | The Republic of the Philippines (the Philippines also acceptable) |
| RUS | The Russian Federation* |
| SGP | Singapore |
| CT | Chinese Taipei |
| THA | Thailand |
| US or USA | United States |
| VN | Viet Nam |

* *The term 'The Russian Federation' is to be used for all APEC meetings at and above Ministerial level. The informal 'Russia' can be used for APEC meetings below that level and also for publications.*

When listing member economies in text, the names should be separated by semi-colons (e.g. Australia; Brunei Darussalam; Canada; etc).

The term 'three Chinas' must not be used. Always refer separately to the People's Republic of China (also can be referred to as China); Hong Kong, China; and Chinese Taipei.

**In paragraphs and sentences.** When using member economy names in a sentence instead of saying – *People enjoy visiting Philippines/US* **USE** – *People enjoy visiting the Philippines or the USA*. The following errors are often made:

| INCORRECT TERM ✘ | CORRECT TERM ✓ |
|---|---|
| Hong Kong | Hong Kong, China |
| South Korea | Korea |
| Philippines | The* OR the* Philippines |
| Taiwan | Chinese Taipei |
| United States (US or USA) | The** OR the United States (the US or the USA) |
| Vietnam | Viet Nam |
| Hanoi | Ha Noi |

*\* When to use an upper case T vs a lower case t. For example use of 'The' or 'the' in front of the phrase United States or Philippines depends on the context; if it is used in a sentence (You are visiting the United States) then lower case "t" is used.*

## Acronyms and Abbreviations *

The following abbreviations should be used when referring to the following APEC Groups:

**Committees**
SCE       SOM Steering Committee on Economic and Technical Cooperation
CTI       Committee on Trade and Investment
BMC       Budget and Management Committee
EC        Economic Committee

**CTI Groups**
AD        Automotive Dialogue
BMG       Business Mobility Group
CD        Chemical Dialogue
ECSG      Electronic Commerce Steering Group
GOS       Group on Services
IPEG      Intellectual Property Rights Experts' Group
IEG       Investment Experts' Group
MAG       Market Access Group
LSIF      Life Sciences Innovation Forum
SCCP      Sub-Committee on Customs Procedures
SCSC      Sub-Committee on Standards and Conformance

**EC Group**
CPLG      Competition Policy and Law Group

**SCE Working Groups**
ACTWG     Anti-Corruption and Transparency Experts' Working Group
ATCWG     Agricultural Technical Cooperation Working Group
CTWG      Counter-Terrorism Working Group
EWG       Energy Working Group
EPWG      Emergency Preparedness Working Group
EGILAT    Experts Group on Illegal Logging and Associated Trade
HRDWG     Human Resources Development Working Group
HWG       Health Working Group
OFWG      Ocean and Fisheries Working Group
SMEWG     Small and Medium Enterprises Working Group
TELWG     Telecommunications and Information Working Group
TPTWG     Transportation Working Group
TWG       Tourism Working Group

**Policy Partnerships**
PPWE      Policy Partnership on Women and the Economy
PPFS      Policy Partnership on Food Security
PPSTI      Public Partnership on Science, Technology and Innovation

**SOM Task Group**
MTF      Mining Task Force

**Other Groups**
CSAE      Chief Science Advisors and Equivalents
FMP      Finance Ministers' Process
HLPDAB      High Level Policy Dialogue on Agricultural Biotechnology
SD      Sustainable Development

**Advisory Group**
ABAC      APEC Business Advisory Council

**Acronyms** should be expressed in all upper case letters with <u>no</u> periods (full stops) between letters. If many are used, please include a glossary at the end of the document.

*Write* out both the full version and the abbreviation at first occurrence. If terms or acronyms are used and they do not appear in a Standard English dictionary, they should be defined at first use. If many are used, please include a glossary at the end of the document.

*Acronyms* that can be pronounced will be in upper lower case.

*Acronyms* and initials are generally not separated by <u>full stops</u> (periods) or blank spaces

*Periods* are not used in units of measurement. Whenever possible, abbreviations of units do not carry the plural form: **54km** not kms, **6pp** (pages). When used with figures, these lower-case abbreviations should follow immediately, with no space (**11am, 15kg, 35mm, 80km**)

**<u>Accent marks</u>**

Not necessary for foreign words accepted in English, e.g., cafe. Use them for foreign words to avoid ambiguity.

Accents and diacritical marks are omitted in headlines and graphics.

**<u>all right</u>** never alright

**<u>Apostrophes</u>** should not be used with acronyms, nor should they be used with numerals. For example,
     in the 1990s not in the 1990's
     LEDs not 'LED's'
     1s and 2s not 1's and 2's
Do not use the apostrophe in titles of organisations:
     Singapore Teachers Union

**<u>Ampersands</u>** (&) should be used when they are part of the name of a company (e.g., AT&T, Proctor & Gamble)
     in R&D and other similar abbreviations
     in addresses
     when two names forms one unit (e.g., Lee & Lee)

## Books, films, ships

Titles of books, films, plays and names of ships to be U/L case without quotations. Italics are necessary.

*The Ghostbusters*
They printed the *Economic Outlook 2012.*

## Brackets

If a whole sentence is within brackets, put the full stop inside.

Square brackets should be used for interpolations in direct quotations: "Let them [the poor] eat cake." To use ordinary brackets implies that the words inside them were part of the original text from which you are quoting.

## Capitalisation

Use upper case sparingly. Captialise words only when necessary.

## Captions

Avoid use of left or right to indicate position of pix referred to. They should be placed close to the pix in such a position that the reader is sure which picture it is referring to. If more than one person appears in the picture, they should be identified with the words "(from left)".

## Commas

Use commas as an aid to understanding. Too many in one sentence can be confusing.

Do not put a comma before *and* at the end of a sequence of items unless one of the items includes another and. Thus "The chair requested a pen, a scrapbook and a cup of coffee." But "He received a pencil, a blue and yellow colored notebook, and a pot of tea. "

Do not put commas after question-marks, even when they would be separated by quotation marks: "May I have a free room upgrade?" he asked.

## Dashes

Use a dash to introduce an explanation, amplification, paraphrase, particularisation or correction of what immediately precedes it.

Never use a dash with a colon, as in :-; the dash is unnecessary.

## Dates

When expressing dates numerically please use day followed by month and then year—DDMMYYYY. Thus 12.2.93 represents 12 February 1993. Do not use 12th May or May 20, 1998. Use 20 May 98 or 20 May 1998.

## Footnotes

Footnotes may be placed at the bottom of the page if there are only one or two; otherwise, list at the end of the document.

## Font Type and Size

The preferred font type is Arial or Times New Roman with *minimum* font size of 10 point for the main (body) text.

## Full Stops

Do not use full points after contractions: 'Dr', 'Mr', 'Mrs', 'St' or 'Ltd', for example.

Full points are used in cases where the last letter of the abbreviation is not the last letter of the word as in initials, 'Mr J. B. Priestley'. They are also used after 'cont.' (continued), 'p.' (page) and 'pp.' (pages).

Do not use full stops in abbreviations.

## Grammar

For the sake of readability of the final documents, overuse of brackets, colons and lists should be avoided. Sentences should be kept relatively short while paragraphs should not exceed ten lines.

## Headlines

To use the lower case letters in auxiliary verbs and prepositions –
  *Progress of Alignment in APEC Priority Areas*

## Hyphens

In general aim for consistency using as little hyphenation as possible, and be consistent. Only hyphenate those words that would otherwise be ambiguous or unpleasant, for examples:

| | |
|---|---|
| 'realign' not 're-align'<br>'microcomputer' not 'micro-computer'<br>'interrelated' not 'inter-related'<br>'coordinate' not 'co-ordinate'<br>'cooperate' not 'co-operate' | 'co-routine' not 'coroutine'<br>'meta-level' not 'metalevel'<br>'half-tone' not 'halftone' |

Hyphens should be used in compound adjectives to clarify the meaning, for example,
  '4-pin plug'      'deep-blue sea'
  'two-year-old children' (which obviously means something different from two year old children).

## Numbers

*Spell out* from one to nine, except in references to pages; in percentages and in sets of numerals, some of which are higher than ten (e.g., in the past four years, the GDP was 3%, 4% and 6%).

Use Arabic numerals from 10 onwards.

Never start a sentence with a figure; write the number in words instead.

Do not compare a fraction with a decimal (so avoid, The rate rose from 1½% to 3.9%).

## Paper Size

The standard paper size is **A4 (8.27" x 11.69")**.

When submitting documents to the APEC Secretariat in Singapore, please format for A4 paper size even if the accompanying hard copy is on paper of a different size.

## Parentheses

A full point should come before the closing parenthesis if the whole sentence is in parentheses, otherwise after the closing parenthesis.

## Paragraphs

When preparing a manuscript, choose only one paragraph style to ensure consistency. There are several variations for paragraphing:
A.  First line of each paragraph is indented. So there is no line spacing between paragraphs.
B.  The first line in the First paragraph is not indented. Subsequent paragraphs are indented and no line spacing between paragraphs.
C.  No indents in all paragraphs. One line spacing between paragraphs.

## Plural
**bacteria** is the plural noun of **bacterium.**
**criteria** is the plural of **criterion.**
**data** is the plural of **datum.**
**graffiti** is the plural of **graffito.**
**media** is the plural of **medium.**
**referendums** is the recommended plural of **referendum**, not *referenda.*
**strata** is the plural of **stratum.**
None of these should be used with a singular verb.

## Terms *

The **Senior Officials' Meetings** or **SOMs** prepare for the annual Ministerial Meeting, which has been followed by an informal **APEC Economic Leaders' Meeting** since 1993. The Leaders' Meeting should not be referred to as a 'summit meeting'. Leaders should not be referred to as 'Presidents', 'Prime Ministers', or 'Chiefs of State', but as Economic Leaders.

Please refer to the **Chair**, rather than the chairman or chairperson. The **Executive Director** heads the **APEC Secretariat**, They oversee Program Directors (PD) and support staff members of the APEC Secretariat.

**Members of APEC** should be referred to as 'member economies' or 'members' or 'economies'. The terms 'nation', 'national' or 'country' MUST NOT BE used as a synonym for an APEC member economy. The term 'member economy government' may be used as appropriate.

## Upper Case Letters

The use of upper case letters should be confined to Standard English use, that is, for proper nouns such as **APEC Secretariat** or the **Human Resources Development Working Group** but not common nouns, the **working group** or the **secretariat**. See also acronyms and abbreviations.

References in the text to chapters, appendices, sections exhibits, tables and figures should be spelt out in full and capitalized if followed by a number, but lower case otherwise. For example:
'... in Chapter 5 ...'
'... in this chapter ...'
'... in Section 2.1 ...'

## Use of Bold and Italic Letters

Use bold for headers or titles; for first definition of terminology, where appropriate.

Use italics (sparingly) for emphasis, for the titles of books and journals and for non-anglicized foreign phrases: *ad hoc, et al.* and so on.

## Seasons

Because APEC spans both hemispheres, the use of Spring, Summer, Winter, and Autumn is inappropriate and references should always be to the calendar month rather than the season. References to quarters should also be avoided where possible since not all economies use the same financial or fiscal reporting year. If quarters must be used then please define at first use.

## Semi-colons

Semi-colons should be used to mark a pause longer than a comma and shorter than a full stop. Please do not overdo them.

Use them to distinguish phrases listed after a colon if commas will not do the job clearly.

## Spacing

Leave only one point spacing between two sentences and not double.

## Spelling

Either British English or American English is acceptable. Use only ONE standard throughout the passage for consistency.

When using -ise, -isation (realise, organisation), please maintain it throughout.

## Website Address or E-mail Address

When listing the website or e-mail addresses, keep the format consistent throughout the document. Such as:

Listed as www.sg OR http://www.sg/ OR http://www.sg '
EITHER info@yahoo.com.sg OR info@yahoo.com.sg

# III. Annexes: Forms

# Annex 1: **Format and Style for Report Covers**

## Report Covers (In Printed and Electronic Copy)

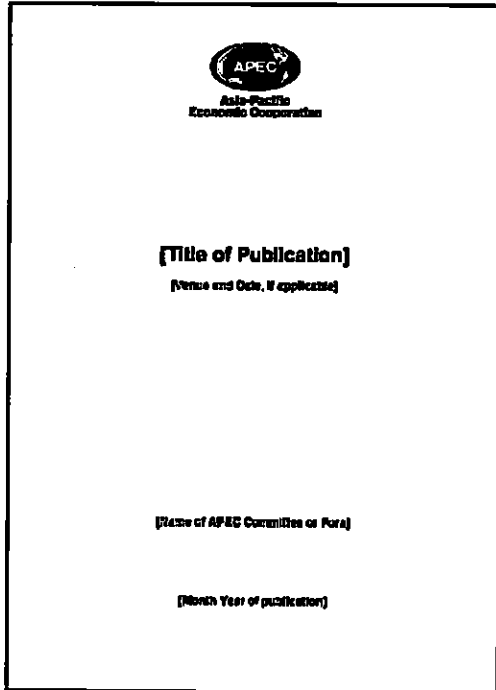*Figure 1: The minimum elements required for front cover and front title page (inside front cover).*

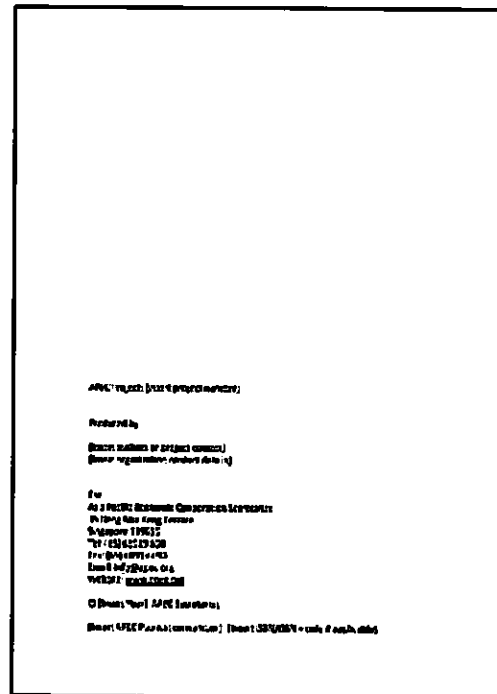*Figure 2: The minimum elements required for back cover and back title page.*



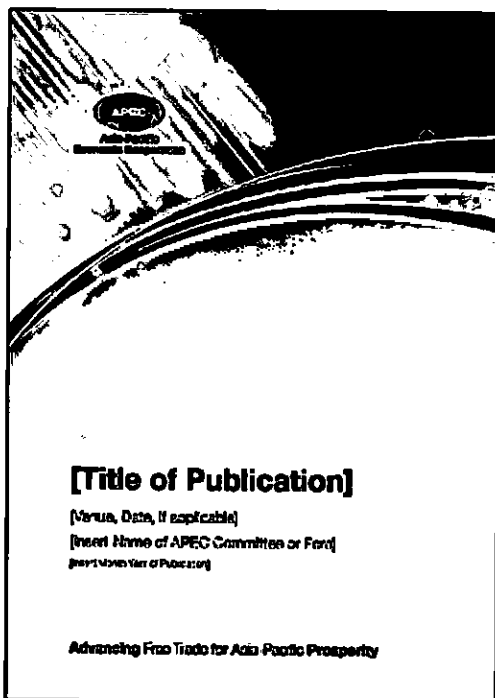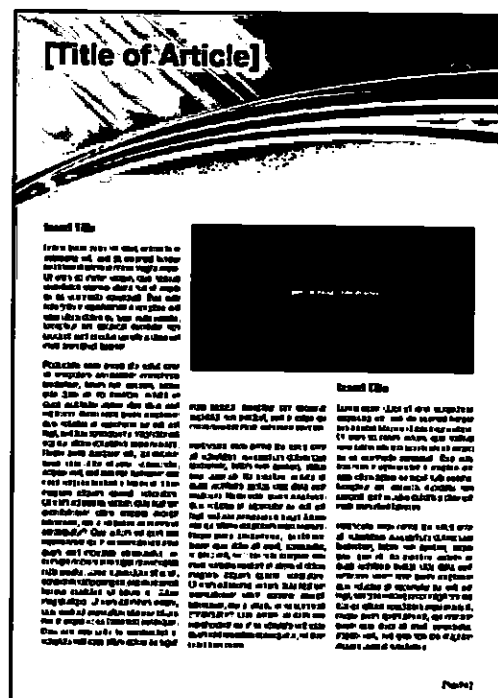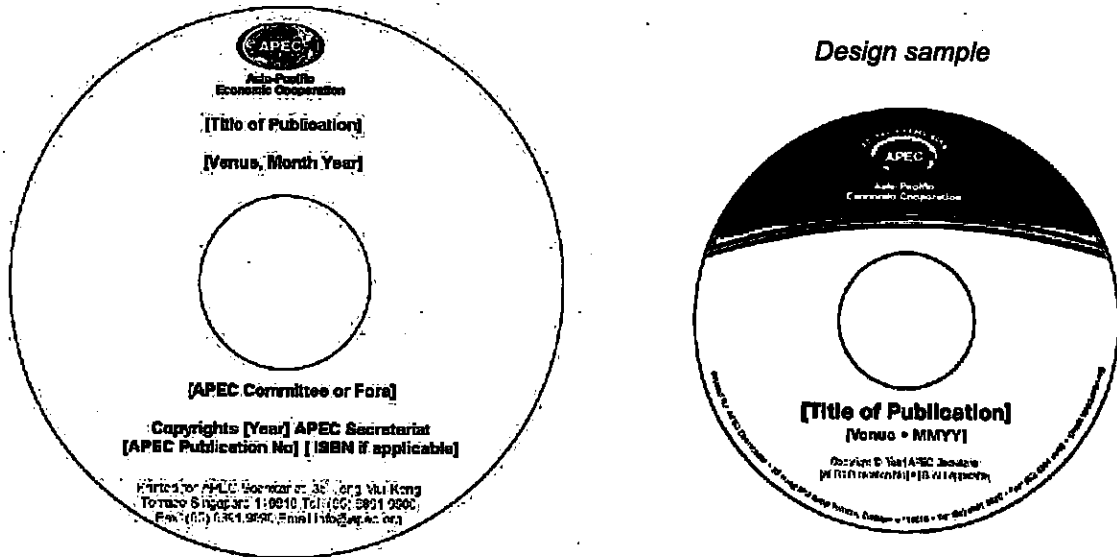*Figure 3: Cover design template sample*



*Figure 4: Content design template sample*

## Compact Discs (CD-Rom) and DVD Labels Designs

*Figure 5: Minimum elements required when printing on the CD-Rom cover or CD face.*



*Design sample*

Artwork files can be requested from either the respective APEC group's Program Director or the Publishing and Brand Manager at the Secretariat.

## Annex 2: APEC Publication Number and ISBN Application Form

The electronic file can be downloaded from:
http://www.apec.org/About-Us/About-APEC/Policies-and-Procedures.aspx

**REQUEST FOR APEC PUBLICATION NUMBER AND**
**INTERNATIONAL STANDARD BOOK NUMBER (ISBN)**
**APPLICATION FORM**

Asia-Pacific
Economic Cooperation

Notes to APEC members, project overseers contractors:

**Scope of Review:**
The APEC Secretariat reviews report covers and final text for compliance of APEC Logo and APEC nomenclature. All final text submitted are assumed to have its substance approved by its respective project overseer, and if applicable, its APEC fora.

**Where to print the catalogue numbers?**
Print the APEC Publication Number, and the ISBN (if any), on the reverse side of the title page And at the right bottom of the back cover of the book.

**When is the ISBN required?**
The inclusion of the APEC publications number is mandatory, but an ISBN is required only when either the 'paperback, VCD or DVD publication*' format is selected. Please allow about three working days of processing time before an ISBN is issued.

**To expedite application, please submit copies of draft covers and final text with the application. Please email to your respective Program Director/Program Executive. You will be informed by e-mail.**

| | |
|---|---|
| APEC Project No (leave blank if not applicable): | Committee/Working Group/Task Force/Subfora: |
| Project Overseer / Author(s) Name: | |
| Project Overseer / Author(s) Address: Telephone: Fax: | |
| The APEC publication number, and ISBN (if applicable), will be sent to this e-mail: | |
| **Details of publication** | |
| Title: | |
| Estimated date of publication (mm/yyyy): | Print Run (for print/handheld): |

Please indicate the format (s) in which the contents will be published in *:
**Print/Handheld**
☐ Paperback (ISBN will be also be applied)
☐ Photocopied and bound
☐ CD-ROM publication
☐ DVD-ROM publication

☐ VCD publication (ISBN will be also be applied)
☐ DVD publication (ISBN will be also be applied)
☐ Other format (Please specify) : _____

**Digital**
☐ PDF publication on APEC PubDB website

☐ Other format (Please specify) _____

Please indicate the type of contents will be published:
☐ Project report, findings, surveys, annual reports, etc
☐ Directories, inventories, etc
☐ Handbooks, guides, manuals
☐ Proceedings of seminars, conferences, meetings
☐ Brochures, compilations, or Translations
☐ Other types (please specify): _____

* Please refer to page 2 for explanatory notes

\* Explanatory notes on format:

| | |
|---|---|
| Paperback – | This refers to materials printed by a publisher/printing company. |
| Photocopied and bound – | This refers to materials printed, photocopied and bound together before distribution. |
| CD-ROM or DVD-ROM publication – | This refers to materials in electronic files replicated in CDs or DVDs. |
| VCD or DVD publication – | This refers to materials that involve self-executable files or media files that need to be reproduced in VCD or DVDs. |
| PDF publication on APEC PubDB website – | This refers to materials published as a PDF file (s) on the website (http://publications.apec.org) |

This form can be downloaded from http://www.apec.org/About-Us/About-APEC/Policies-and-Procedures.aspx
For queries, please contact: publications@apec.org

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**Annex 3: APEC Fora and Project Publications: Production Procedures in the Secretariat**

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## Initial Planning

Notification of any publications that are to be produced by or on behalf of APEC fora or APEC-funded projects should be provided by Program Directors to the Director (Communications and Public Affairs) and/or the Publishing and Brand Manager as early as possible to enable the Secretariat to make recommendations on proposed production budgets and distribution and marketing requirements. Possible co-publishing or other commercial arrangements should also be discussed in this initial stage when applicable.

## Liaison

**Program Directors (PDs) and their Program Executives (PEs)** are responsible for correspondence with their respective fora or project overseers to coordinate and compile manuscripts, sourcing of illustrations and graphic content; and dissemination of the completed publication through agreed distribution points. Project overseers and authors must ensure the substance of their work and must adhere to the APEC guidelines for printed materials, multimedia and websites. The *APEC Publication Guidelines* and *APEC Logo Guidelines* provides the references for the policies and references for graphic/artwork design, Style Manual and Accepted Nomenclature for print and web applications. PDs and PEs will act as liaison points between APEC fora/groups/project overseers under their charge and the Secretariat. PDs are responsible for reviewing all draft project publications for personal data.

**The Publishing and Brand Manager** is responsible for overseeing the publishing process: including obtaining tenders and quotes; liaison with designers, editors, proofreaders, printers and co-publishers; management of artwork production and typesetting through to final printing. Other duties include: cataloguing, completion of inventory and legal deposit requirements and exploration of marketing and promotional opportunities. The Publishing and Brand Manager will act as the liaison point between the designers, printers, commercial distributors and the Secretariat.
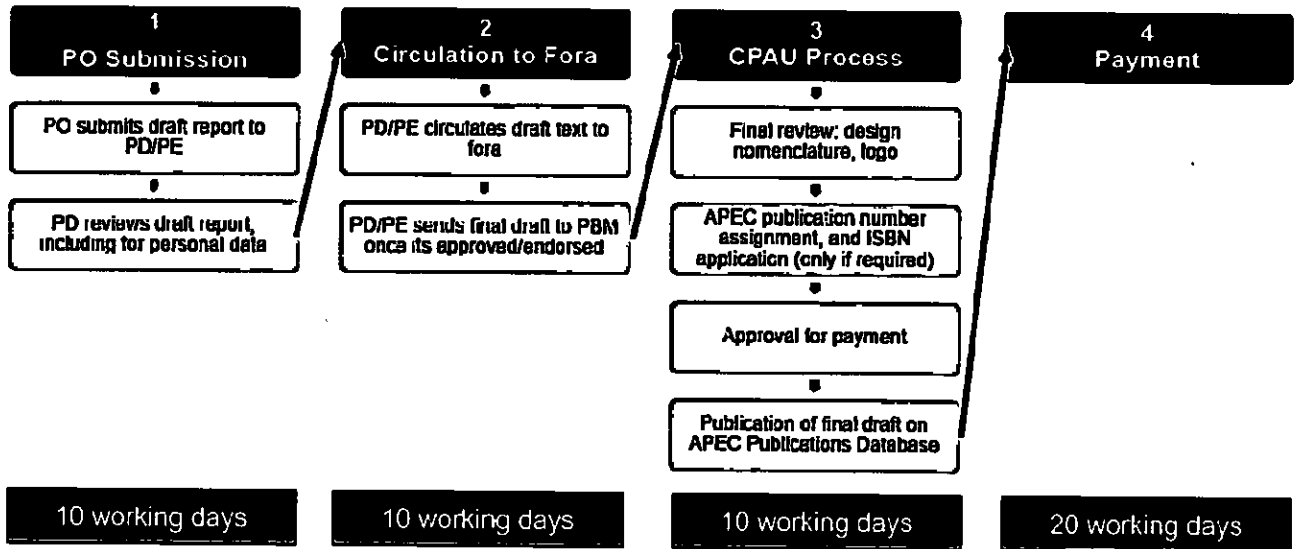
## Types of Publications (Includes Multimedia)

There are two main categories of publications: **major publications or reports** and **routine or limited-run publications**.

*Major publications* include publications that require a budget separate from the project fund, or that have a potential for wider readership. For these publications the Secretariat has a role in overseeing compilation, editing, creative development, typesetting, printing and distribution e.g. Annual Committee/Working Group Reports and other major publications of interest to industry, business or academic audiences.

*Routine and limited-run publications* include reports produced by fora or as part of a project that have narrower audiences or are of interest predominantly to those working within the APEC process. These publications require less emphasis on creative development and usually require only typesetting services or production to camera-ready format (for direct electronic or hardcopy reproduction) e.g. conference proceedings and study reports.

Figure 1: APEC Project Publications Process

| 1 PO Submission | 2 Circulation to Fora | 3 CPAU Process | 4 Payment |
|---|---|---|---|
| PO submits draft report to PD/PE | PD/PE circulates draft text to fora | Final review: design nomenclature, logo | |
| PD reviews draft report, including for personal data | PD/PE sends final draft to PBM once its approved/endorsed | APEC publication number assignment, and ISBN application (only if required) | |
| | | Approval for payment | |
| | | Publication of final draft on APEC Publications Database | |
| 10 working days | 10 working days | 10 working days | 20 working days |

## Time Frame

It is important that all text be expertly edited by APEC fora or other relevant parties before being presented to the Secretariat, for review for APEC publication number assignment; creative development; and/or print production. The following are some indicative production timelines for publications depending on the level of input required from the Secretariat.

| Stage | Task | Timeframe |
|---|---|---|
| 1 | PO submits draft report to PD/PE<br><br>PD reviews draft report for personal data. If the draft text does not contain personal data, PD/PE circulates to fora.<br><br>If the draft contains personal data, PD will return draft to PO for revision. PO addresses feedback and sends revised draft to PD. | 10 working days |
| 2 | PD/PE circulates draft text to fora<br><br>PD/PE then sends **final draft** to PBM once its approved/endorsed | 10 working days |
| 3 | PBM processes final draft for publication. This includes:<br>• Final review (review for design, nomenclature and logo)*<br>• APEC publication number assignment**<br>• If required, ISBN application (ISBN is processed externally within 3 working days)**<br>• Approval for payment<br>Publication of final draft on APEC Publications Database | 10 working days |
| 4 | Finance processes payment | 20 working days |

* All final text are assumed to have its substance approved by its respective project overseer and if applicable its APEC fora.

** To expedite application, copies of the draft covers and text should be submitted with the Publication number application form *(ANNEX 2)*.

## Budget

Publications budget approved as part of APEC projects should include all print production costs, including design development, editorial, print and distribution costs.

## Publication Process

APEC fora publications (under Project Accounts) printed by the APEC Secretariat:
- In consultation with the Director (Communications and Public Affairs) and the Publishing and Brand Manager, the PD of the fora will provide necessary details of the publication including release details, writing and production timeframe, target audiences, distribution and marketing channels and promotional arrangements.
- PDs will provide the manuscript, the account numbers and specifications for the publication.
- Based on the specifications agreed for the publication(s), The Publishing and Brand Manager will obtain tenders for the project. Normally the lowest bid will secure the project. However, a higher bid may be chosen for quality or work efficiency.

- Fora and project overseers are fully responsible for the content of their publications. All mark-ups of any grammatical changes will be provided to the PD.
- Editorial and creative/design development will normally take place concurrently. The final text of proofread manuscripts, cover designs, text layout and final artwork will be endorsed by the Director (Communications and Public Affairs) and the PD at each stage.
- Where applicable, the Publishing and Brand Manager will request ISBN/ISSN from the National Library Board and assign APEC Publication numbers before proceeding to print.
- Please refer the indicative timelines in the paragraph above.

## Final Delivery

- The Publishing and Brand Manager will inform the respective PE when the books arrive at the Secretariat. PE will distribute the books according to the distribution list *(ANNEX B)* agreed between the PD and the Project Overseer/Coordinator.
- The Secretariat will provide assistance with sale and marketing of publications according to agreement reached with the PD and Project Overseer/Coordinator at the start of the project. The current pricing formula is: *Cost of Print* divided by *Print-Run* multiplied by 2.5 times. Revenues generated from the sale of publications are returned to the APEC Funds.
- Two copies of the publication will be sent to the Singapore National Library Board.
- Two to three hard copies will be given to Publishing and Brand Manager for archival purposes.
- The electronic copy will be given to Publishing and Brand Manager for listing in the APEC website.

For more information, please contact Mr Muhammad David, Publications and Brand Manager, APEC Secretariat at md@apec.org or (65) 8054 0892.

> **Annex 4: Guidance On Preparing Project Final Reports** [see Contracting Forms & Resources, http://www.apec.org/Projects/Forms-and-Resources.aspx]

## 1. Background

Currently APEC does not have any guidelines on how final project outputs such as Final Project Reports should be prepared and what these documents should contain. This note provides some basic guidance on the content and the structure of the documents to ensure that basic quality requirements are met and a standard approach established across the board for key project deliverables. Reports are still required to observe the APEC Publications and APEC Logo Guidelines.

The Final Reports are not to be confused with the **Project Completion Report** – the latter is a BMC requirement. The Completion Reports aim to seek specific information on a range of issues to satisfy the requirements of APEC's monitoring and evaluation framework approved by BMC in 2010. Information on Project Completion Reports (CR) is contained in the Project Guidebook under **Chapter 7** of the Project Guidebook and CR templates are at Appendix H of the 8th Edition of the Guidebook on APEC projects.

## 2. The Purpose

The Final Report is a final output or a deliverable submitted upon the completion of an APEC activity. This is in some cases prepared in addition to any technical reports, research/field study reports, special study reports, survey reports, guidebooks, or compilations of workshop/seminar proceedings as agreed and specified under a project-specific contractual agreement.

It serves the needs of Project Overseers, Fora members, the APEC Secretariat and participants by documenting the outcomes of the activity, project achievements and any lessons learned. This should complement the information contained in the CR. Where relevant POs should be encouraged to append the Final Report to the CR.

The document should contain a basic level of detail about the project scope, objectives and achievements (outputs and outcomes). Some reports can be technical in nature and in these cases, the scope and length of the document will vary. The actual content will be determined by the relevant Project Director or working groups/sub-fora based on the specific requirements of the group and the particular topic.

It is expected that a standard format will be followed to ensure that **consistency** is maintained between all Final Reports relating to APEC activities and that value for money is achieved. The following provides a **basic guide** on the format and content required.

## 3. Format and Contents

i. A Title Page containing the activity name and fora details *(Please refer to Annex 1)*
ii. Table of Contents, Glossary, List of Acronyms **if relevant**
iii. Basic data[3] – information on activity location, key dates of implementation, fora details, participant details, information on experts, summary of management arrangements, information on contracting arrangements if relevant. This section should also contain the basic information from the original project proposal on relevance, objectives and the scope of the project.
iv. Key outputs – research reports, surveys etc
v. Key outcomes compared with activity objectives as well as achievements against strategic priorities. This include information on the likelihood, the magnitude and the nature of the anticipated benefits for key stakeholders outlined in the original proposal.
vi. Overall Impact and lessons learned; and
vii. Conclusions and information on next steps.

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[3] note that the agenda, participant list, and any presentations should be appended to the main document

## Annex 5: Distribution Plan: Worksheet Sample

Size of print run                                                                 Total        _____

Free Distribution

Free Distribution to member economies: _____ * 21 =        _____

Required for archives and library use:                                                      5

Free distribution by Secretariat:                                                         _____

Others:
        Indicate to whom _____                            _____

                                                Free Distribution SUBTOTAL     _____


COPIES FOR SALE = Total – Free Distribution Subtotal                        _____


**Issues**

- If copies of publications are to be made available for sale (or more than 20 copies for free distribution), target audiences/markets must be specified and sales projections and sale methods agreed prior to the start of the project.
- As part of the above process, input should be provided by the publication's author and the fora lead shepherd/chair for market contacts and estimates of likely publication sales. For example, if a specific industry would be interested in the book, names and contact information should be supplied for the industry associations in member economies.

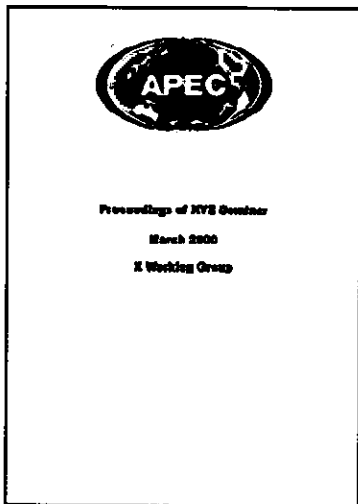# Annex 6: Incorrect Uses of the APEC Trademarks

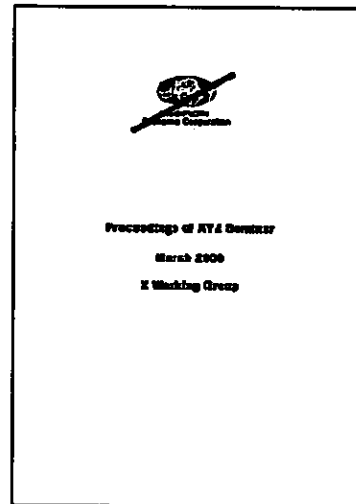*See* APEC Trademarks Guidelines (for Logo Guidelines and artwork files)
*http://www.apec.org/About-Us/About-APEC/APEC-Logo-Use.aspx*
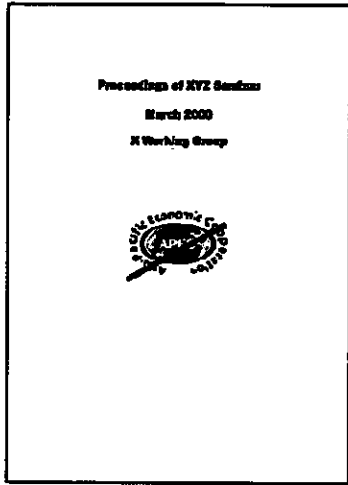


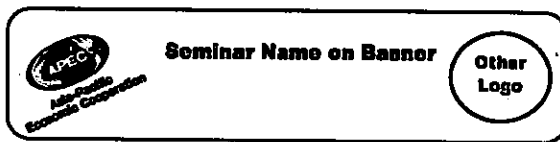**Do not alter the relationships**
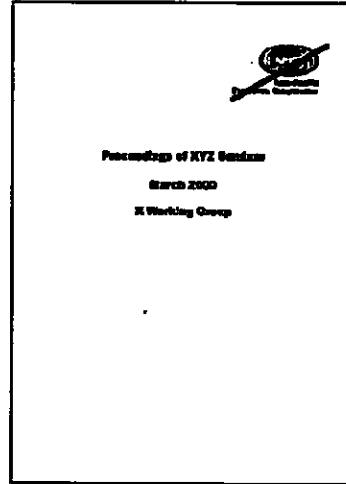


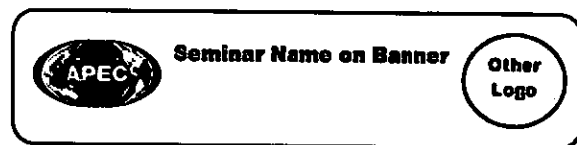**Do not alter the typeface**



**Do not separate the typeface from the symbol**



**Do not alter the colour, proportions or modify the logotype**



**Do not rotate the APEC Logo**



**Do not separate the typeface from the symbol**

## Annex 7: APEC Publications Toolkit: Standards for Content Development, Data Visualization and Quality Control

*See* APEC Publications Toolkit: Standards for Content Development, Data Visualization and Quality Control