CHAPTER 2

Standardisation and the South African editing industry

2.1 INTRODUCTION

The need to develop standards for the South African editing industry is becoming increasingly imperative, particularly against the background of the recent expansion in research dealing specifically with the professionalisation of the editing industry, at a local and global level. The development of standards is of great importance for any industry, as standards contribute directly to the regulation, and indirectly to the professionalisation of the industry. However, the formulation of standards is not a simple task. Standards development is a process that entails extensive research and consultation, focusing on diverse factors and role-players.

The literature survey presented in this chapter provides an overview of the status of the South African editing industry in order to contextualise the potential effects of standardisation on the industry. The development of standards will therefore require an investigation into the various components of the industry. This chapter thus focuses primarily on the contextualisation of relevant issues pertaining to the professional regulation and standardisation of the South African editing industry. In Section 2.2, the professional status of the South African editing industry is discussed. Specific reference is made to editor training, prominent organisations representing the interests of editors, and research dealing with the professionalisation of the South African editing industry. Section 2.3 motivates the need to standardise the South African editing industry and discusses the processes involved in and the purposes of the development of standards. Section 2.4 contains three case studies that illustrate the progress made towards the regulation of the editing industry in other countries, while Section 2.5 pays attention to examples of regulation and standardisation in other fields of language practice that may be useful for the purposes of this study.

2.2 THE PROFESSIONAL STATUS OF THE SOUTH AFRICAN EDITING INDUSTRY

The professional status of any industry is strongly linked to the level of professionalism practised by the members working within the industry. This level of professionalism is, in turn, linked to the degree of control imposed on the work of the industry members. Séguinot (2008:1) states that the term "profession" embodies a sense of "(1) a collective, (2) restricted membership and (3) standards or expectations". From this definition, it is possible to deduce that the professional status of an industry relies greatly on the competence of the practitioners

working within the industry, but also on the consistent and standardised regulation of the industry.

The process of professionalisation varies from industry to industry. However, a number of models and theories have attempted to define both the process of professionalisation and the prerequisites for a profession. Séguinot (2008:3) outlines one recent analysis of the process of professionalisation:

> In the field of organisational studies, research into the formation of professions shows that when training migrated to universities, the standards got higher, the training got longer, and there was a move to hire full-time instructors. The next step in the professionalisation process was found to be the creating of professional associations, and after an explicit attempt to separate competent practitioners from the incompetent. Codes of ethics followed, and then an attempt at some form of legal recognition in the form of limiting the right to use a professional title or the more restrictive practice of licensing.

This analysis of the process of professionalisation emphasises three key elements of a profession: training, regulation and exclusive knowledge. If these three characteristics are indicative of a profession, then it appears that the editing industry in South Africa is in the process of being professionalised.

In recent years, an increasing amount of research focusing on the professionalisation of the South African editing industry has been published (see Kotze, 1997; Kruger *et al.*, 1998; Du Plessis & Carstens, 2000; Blaauw, 2001; Kruger, 2007, 2008; Law & Kruger, 2008; Carstens & Van de Poel, forthcoming). Scholars and practitioners have become aware of the need to professionalise and regulate the industry. This is reflected in the increasing number of research reports dealing specifically with the clarification of the role of the editor, the professional status of the industry, and the need to establish some sort of regulation of its practices that have been published.

While the intentions of these research reports have been to highlight the need for professionalisation, very little progress seems to have been made in terms of establishing practical measures that will contribute to the eventual professionalisation of the South African editing industry. According to Webb (2007:4), this is because, at governmental level, nothing contributing to the professionalisation of the language industry has happened since 2003. Against this background, the aim of this chapter, then, is to analyse the status of the South African editing industry in terms of the processes for establishing a profession (as pointed out by Séguinot, 2008), as this might indicate some problems associated with attempts to professionalise the editing industry.

2.2.1 Training

As in many of the language professions, a shift from in-house training to formal training for editors in South Africa appears to be taking place (see Du Plessis & Carstens, 2000; SAQA, 2005; Kruger, 2007, 2008; Carstens & Van de Poel, forthcoming). This shift is due largely to the fact that most publishing houses make use of freelance editors, and as a result there are fewer in-house editors available to take on training functions (Kruger, 2007:6). This has led to a change in the availability of training opportunities for editors. In the qualification detail report for a national diploma in text editing and document design, issued in 2005, the South African Qualifications Authority (SAQA, 2005:27) has recognised many of the issues outlined here, "Currently there are fewer opportunities for in-service training than in the past. Moreover, in-services training has focused on learners' attaining practical experience and has not included sufficiently underpinning theory."

The national diploma in text editing and document design (SAQA, 2005) falls under the subfield of communication studies and is a level-8 qualification in the National Qualifications Framework (NQF). The aim of the qualification is to "enhance the quality of education and training in text editing and document design by ensuring that both practical and underpinning theoretical components are incorporated" (SAQA, 2005:26). To this end SAQA (2005:27-30) has articulated the following exit level outcomes for the diploma:

Fundamental and core

- use information sources in the editing process,
- adapt text structure and sequence for the intended medium, audience and purpose,
- adapt language, style and presentation for intended medium and audience,
- correct language errors in a particular language,
- ensure accuracy and consistency in text based on specific requirements,
- ensure acceptability of language in terms of social and cultural context, medium and audience,
- select editing method and strategies appropriate for specific contexts,
- check proofs in page layout form against design specifications, and
- design documents for intended purpose, media and audience.

Elective (achievement of one outcome is required to qualify)

- write specialised information for specific audiences,
- contextualise information in specialised text,
- analyse technical information in text, and
- edit language usage in text in a second language.

These outcomes clearly take cognisance of the many roles that an editor has to fulfil, and incorporate a number of key skills. Perhaps the most significant aspect of this qualification is its emphasis on the fact that editor training needs to be standardised as a step towards professionalisation. SAQA (2005:27) highlights the importance of standardising editor training: "There is a need for the improvement of standards in text editing in South Africa, where the application of these competencies in a professional capacity will ensure that qualifying learners are market-ready and productive as soon as they qualify."

However, there are a number of concerns regarding this diploma. The diploma and the skills associated with obtaining it were developed using the standards for editors in Canada as a basis (SAQA, 2005:31). It should be noted that these standards were extensively adapted by the Translating, Interpreting and Language Editing Standards Generating Body (TILE SGB), which comprises groups of South African language practitioners. Despite this, there is cause for concern because of the fact that standards for the industry in any country are context-specific, and are developed to accommodate the industry within that country. As discussed in Chapter 1, the situation in South Africa presents a number of challenges for standards development because of the multilingual context in which the editing industry exists. Kruger (2007:5) asserts that the training of editors needs to be looked at pragmatically "particularly considering the South African context, where the need for language professionals in various languages and domains is growing fast, and training opportunities are not necessarily keeping up". This is a significant point, as the training of editors in South Africa needs to be based on skills appropriate for the South African editing industry.

Another problem with the diploma is that it appears to be somewhat limited in its coverage of aspects of the editing process, focusing on language editing, structural editing, stylistic editing, document design, and the publishing process. These skills are central to the role of the editor, but they do not necessarily encompass other aspects of editing that also form part of an editor's job, such as project-management skills, computer and technological skills, and personal and interpersonal skills.

Editing has been incorporated into tertiary training programmes at a number of South African tertiary institutions. According to PEG (2010a), the following institutions offer some form of editor training:

- The North West University's (NWU) Vaal Triangle Campus offers a BA, BA Hons, MA and PhD in Language Practice.
- The University of Johannesburg (UJ) offers a BA in Language Practice, and a BA Hons, MA, and DLitt et Phil in Linguistics and Literary Theory with specialisation in Translation, Editing and Interpreting.

- The University of the Witwatersrand (Wits) offers a BA Hons in Publishing Studies, and a course in Advanced Sub-editing for journalists, which is presented by the Graduate Journalism Programme.
- The University of Pretoria (UP) offers a B IS (Information Science) in Publishing, a three-year undergraduate degree course and a two-year Honours programme.
- The University of the Free State (UFS) offers a BA in Language Practice, a Postgraduate Diploma in Language Practice, and an MA and PhD in Language Practice.
- The University of KwaZulu-Natal (UKZN) offers an Introduction to Editing and Publishing course which is offered by the University of KwaZulu-Natal Press.[1]

According to Kruger (2007:3-5), there seems to be a general agreement among language professionals that training needs to take place within a formal tertiary context, particularly since (in South Africa specifically) the need for language professionals in various languages and domains is growing fast. This is reiterated by the findings of a survey by Law and Kruger (2008:485), who found that most editors (in South Africa) feel that the skills required to be an editor are most successfully acquired at tertiary institutions, and that the training of editors should be part of dedicated programmes or degree courses in publishing or language practice.[2] However, the training of editors at tertiary institutions is far from standardised or regulated. For example, both UFS and UJ offer a BA in Language Practice, yet the curricula for these degrees differ significantly in terms of their structures and outcomes.

UFS offers a three-year undergraduate degree in language practice. According to UFS (2010, 98-99) the curriculum for this degree is compiled as follows:

1. Compulsory modules for each year of study (96 credits):
    a. Modules in Language Practice (48 credits)
    b. Modules in Linguistics (16 credits)
    c. Modules in two languages (32 credits)
2. Limited-option modules for each year of study (32 credits):
    a. At least 72 credits in a recommended field, spread over three years
    b. At least 24 credits in basic general skills modules spread over two years.

[1] In 2008, PEG listed the various universities of technology (DUT, TUT, CUT) as offering training for language practitioners. However, the information in PEG's list has since changed.

[2] In 2007, Law and Kruger conducted a study into the feasibility of professionalising the South African editing industry. Questionnaires were distributed as part of the data-collection process. The questionnaire listed a number of statements dealing with issues of professionalisation, accreditation, training and standardisation. The conclusions drawn in terms of training are based on the following results: 94.5% of the respondents to the questionnaire agreed that "Editors are professionals who need to undergo some form of formal training"; 91% of respondents agreed that "the training of editors should be done at tertiary institutions".

According to UFS (2010:99-102) the compulsory modules (and majors) in language practice taken over the course of the degree are:

First year

- The professional language industry,
- Introduction to translation theory,
- Introduction to language practice,
- Language policy and language rights,
- Terminology, and
- Introduction to language and speech technology.

Second year

- Document design,
- Computer-assisted translation,
- Copywriting (theory and practice), and
- Professional, cultural and sociolinguistic aspects of interpreting.

Third year

- Translation theory,
- Language editing (theory and practice),
- Translation practice, and
- Interpreting (theory and practice).

UJ also offers a BA in Language Practice (called BA Language Practitioners). According to UJ (2008:50) the curriculum for this degree is compiled as follows:[3]

First year

- Linguistics and literary theory,
- Two languages,
- Production and reception of texts,
- Cross-cultural communication, and
- Two ancillary subjects (Communication, Journalism and Audio-Visual Communication).

[3] UJ also offers a BA Honours, MA and PhD in Translation Studies specifically, but these degrees, which are geared specifically towards the fields of translation, interpreting and editing, are postgraduate degrees.

Second year

- Linguistics and literary theory,
- Two languages, and
- Two ancillary subjects or two additional languages.

Third year

- Linguistics and literary theory, and
- Two languages.

The differences between the curricula for BA degrees in Language Practice offered at UJ and UFS demonstrate that the training of language practitioners (and by implication editors) at South African universities is far from standardised or regulated. This means that the training of editors differs from institution to institution, and as result, editors enter the industry with similarly titled degrees, but vastly different sets of skills.

Of course, the differences between curricula in language practice at different universities may obviously be linked to the relative novelty of degrees in language practice. According to a survey by Law and Kruger (2008:483) most currently practising editors hold general degrees in languages or linguistics rather than in language practice.[4] This may be attributed to the fact that degrees in language practice are a relatively new development, and were not available in the past (Law & Kruger, 2008:485).

The development of degrees focused on the language professions (such as translation, interpreting and editing) may also be attributed to the fact that in 2002 and 2003, the Department of Arts and Culture (DAC) took significant steps towards the professionalisation of the language industry. This is evident in the National Language Policy Framework (NLPF) (see Section 2.2.4 for a more detailed discussion). The NLPF takes cognisance of the importance of editor training and the growing need to develop and standardise training at tertiary institutions. In 2003, the then Minister of Arts, Culture, Science and Technology, Dr Ben Ngubane said, "it is important to note that the implementation of the Language Policy Framework will increase the demand for translation and editing work and interpreting services... The growing need for the services of professional language practitioners will create a demand for further training and educational resources" (Ngubane, 2003).

[4] In a study dealing with the feasibility of professionalising the South African editing industry conducted by Law and Kruger in 2007, 49% of the respondents (practising editors) indicated that they held degrees in Languages and Linguistics, while only 22% of the respondents indicated that they held degrees in Language Practice (Law & Kruger, 2008:483).

However, in order for this process to be successful the industry needs to establish standards for training and practice that will act as a guideline in developing and promoting the training of editors at tertiary institutions. Kruger (2007:7) reiterates this point:

> Before developing a course for the training of editors, it is important to determine what knowledge, skills, values and attitudes the course needs to facilitate, instil and develop. This is important particularly to ensure that the course is focused, that it is relevant to the industry, that it conforms to learners' expectations, that it adheres to standards for quality, and that it conforms to the requirements of the South African educational system.

The importance of standardising the training of editors in South Africa is clearly a matter that needs to be addressed, particularly considering the difference in curricula for editors at various training institutions. This issue, however, is largely dependent on the development of standards for editing practice. Only when the industry has a set of guidelines to develop and facilitate training and practice, will it be possible to take further steps towards the professionalisation of the industry. Furthermore, the continuous regulation and control of people entering the industry is dependent on the establishment of a professional association and the standardisation of the South African editing industry.

2.2.2 Professional associations

Currently, the two most prominent associations for South African editors are the South African Translators' Institute (SATI) and the Professional Editors' Group (PEG).

SATI was founded in 1956 by a group of translators whose aim was to "give the translator professional status and pride and to ensure an honourable position for the translation profession among other professions" (SATI, 2007a). Fifty-four years later, SATI has become the main regulatory body for translators in South Africa, and has expanded its membership to accommodate other language professions, such as sworn translation, interpreting, language editing, and terminology development. SATI endeavours to protect language professionals, and outlines the following objectives in its constitution (SATI, 2007a):

- To promote the interests of the translation profession
- To undertake and promote research in the field of translation and to make the results of such research available
- To obtain appropriate publicity in newspapers and magazines and through other media and to publish and control a journal of its own

- To obtain the co-operation of experts and interested persons from universities and other organisations and of associations and bodies both in this country and abroad and to promote common interests and action
- To compile language and translation guides or to have them compiled
- To collect and utilize funds for the achievement of its objectives
- To introduce a professional code for translators and to work to ensure that members comply with it
- To work towards the establishment of proper training facilities for translators
- To introduce examinations with a view to admission to membership of the Institute

SATI offers six categories of membership: honorary member, founder member, member, accredited member, student member, and corporate member (including language agencies and language offices) (SATI, 2007d). Membership of SATI is voluntary. Language professionals are in no way forced to join SATI, but membership with and accreditation through SATI is becoming increasingly recognised in the industry.

In terms of support for its members, SATI offers an array of activities. These activities include forums and meetings, email communications and publications, bulletins, *Muratho* (a publication that contains articles and information on industry developments and news), accreditation (see Section 2.2.3), a code of ethics for individuals and corporates, advice for freelancers, and a database of members that is available to clients and users of language services.

While SATI certainly contributes significantly to the status of the language professions in South Africa, its focus is spread amongst all the language professions, and it is therefore not exclusively aimed at editors. PEG, however, is aimed specifically at editors. PEG was launched in 1993 and is an interest and support group for copyeditors, proofreaders and other practitioners in the South African publishing industry, in corporate communications and in the media (PEG, 2010b). PEG offers three types of membership (student member, associate member, and member) and is planning to introduce two additional types of membership, namely accredited member and advanced member. The introduction of these two types of membership will aid in the differentiation between new editors (designated associate), qualified editors (designated student or member) and experienced editors (designated accredited or advanced) (PEG, 2010c).

PEG offers support to its members in the form of electronic discussion forums; e-mail communication of meetings, events and job opportunities; a quarterly publication that covers the latest news and trends within the industry; and a directory of members' services that is circulated nationwide to publishers and other employers of freelance workers (PEG, 2010b). In addition, PEG offers the PEG Proofreading and Copy Editing training programme that is

designed to introduce newcomers to the profession and to provide current members with the opportunity to refresh their skills (PEG, 2010d). According to PEG (2010f), during 2009/2010 the Continuing Professional Development (CPD) programme will be launched. This programme allows members to earn points for "undergoing training, attending workshops and certain meetings and seminars, subjecting themselves to testing and obtaining references from regular clients" (PEG, 2010f). The CPD programme will award members points for each of these activities, and rank their professional status according to graded levels (PEG, 2010f). Although this form of regulation is still in the development-phase, it suggests that PEG is transitioning from an informal support group for editors, to an organisation that could contribute towards the regulation of the industry.

While SATI and PEG are associations that offer language practitioners, and more specifically editors, various forms of support, and, increasingly, also attempt to regulate their members, neither is recognised as a professional association at a legislative level, and they therefore have very little control over the training of editors and the regulation of the industry. However, some steps to form such a legally recognised professional association have been taken. In 2000, the South African Language Practitioners' Council (SALPC) Bill[5] was drafted. The aim of the bill is to establish the Language Practitioners' Council of South Africa (DAC, 2000:1). The council forms part of the NLPF, an initiative of the DAC to promote multilingualism in South Africa.[6] As indicated by the name, the council will represent all South African language practitioners, including translators, interpreters, editors and lexicographers. According to the DAC (2003:14) the objective of the council is "to raise the status of the profession and safeguard the quality of products. It will also protect members of [the] public who make use of language services". The purpose of the council is therefore to protect the rights and interests of language professionals and the users of language services. In terms of achieving this, the NLPF highlights the following functions of the council (DAC, 2003:15):

> The Language Practitioners' Council of South Africa will manage the training, accreditation, and registration of language practitioners in an effort to raise the status of the language profession and the quality of language products by setting and maintaining standards. The Council will cooperate with the National Qualifications Framework (NQF) training programmes and South African Qualifications Authority (SAQA).

[5] For more information on the SALPC Bill see www.dac.gov.za/bills/bills26303.pdf.

[6] The NLP will be discussed in further detail in Section 2.2.4.

At the time of writing, no information regarding the progress of the bill is available.[7] However, it is envisioned that when the bill is passed the South African language industry will undergo processes leading to the eventual professionalisation of the industry. This will mean that all language practitioners in South Africa will be required, by law, to register with the council and undergo the accreditation and regulatory processes established by the council.

2.2.3 Regulation: accreditation and codes of ethics

Accreditation and regulation are vital for the professionalisation of any industry (see Halmos, 1973; Larson, 1979; Langenhoven & Daniels, 1980; Carmichael & Pomerleano, 2002; Frost, 2007; Wadensjö *et al.*, 2007). Accreditation is, arguably, the most efficient way to determine whether the practitioners within an industry are competent. The accreditation of South African editors is pivotal for the professionalisation of the editing industry. However, a number of challenges need to be addressed before a generally accepted and/or legally enforceable form of accreditation can be established.

In 2007, Law and Kruger (2008) conducted a study to determine the feasibility of establishing some form of widely accepted accreditation for South African editors. The study yielded a number of meaningful findings regarding the accreditation of editors. Possibly most significant is the finding that many South African editors are in favour of accreditation; however, most seem to be concerned about how accreditation is achieved.

Traditionally accreditation is achieved through an examination, but this poses a number of problems for the editing industry, since a significant number of skills associated with editing are not easily or accurately demonstrated within an examination environment (Law & Kruger, 2008:491). Another problem with accreditation through examination is that it might not precisely reflect the editor's ability, as stressful examination environments could cause editors to make mistakes that they do not make in practice. This is supported by studies dealing with the link between test anxiety and academic performance. According to Cassady and Johnson (2001:272) cognitive test anxiety (or worry) is composed of "individuals' cognitive reactions to evaluative situations, or internal dialogue regarding evaluative situations, in times prior to,

[7] On 16 March 2010, Judge Ben du Plessis ruled in the High Court in Pretoria that the government had not complied with its obligation under the constitution to regulate and monitor the use of the eleven official languages. Judge du Plessis ordered the Minister of Arts and Culture (Ms Lulu Xingwana) to comply with the obligation within two years (Anon, 2010). This means that the government has been ordered by the High Court to implement measures to ensure the regulation and use of the eleven official languages, which could impact the professional status of South African editors.

during, and after evaluative tasks". Cassady and Johnson (2001:272) state that individuals dealing with high levels of cognitive test anxiety often have thoughts that centre on:

- comparing self-performance to peers,
- considering the consequences of failure,
- low levels of confidence in performance,
- excessive worry over evaluation,
- feeling unprepared for tests, and
- loss of self-worth.

These thoughts have a negative impact on an individual's performance during an examination. Sarason (1984:930) says that experimental studies on test anxiety have provided evidence that cognitive interference is an important factor in lowering the performance of highly test-anxious people. This suggests that people who have to indicate their competence by way of an examination might perform poorly during the examination due to anxiety, which could result in an incorrect representation of their abilities.

All of the above means that the editing industry needs to devise innovative ways of establishing a system of accreditation that assesses all the tasks and skills associated with the daily working life of editors. In terms of the accreditation of South African editors, Law and Kruger (2008:491) conclude that the use of a portfolio submission may provide an alternative (or supplement) to the more traditional accreditation exam:

> [T]he idea of obtaining accreditation through the submission of a portfolio has many advantages. Most importantly, the work submitted through a portfolio is a true representation of an editor's abilities and skills as they are realised in the working world, and the editor does not have to deal with the anxieties created by an artificial examination environment.

Clearly, the accreditation of editors in South Africa is a process that will require extensive research and prudent implementation. A number of key issues and challenges need to be addressed and resolved before any feasible and acceptable form of accreditation can be established. However, for now most South African editors can obtain voluntary accreditation through SATI and PEG in co-operation with SATI.

In 1990, SATI introduced a system of accreditation for language professionals. The introduction of this system was part of an "effort to improve the standing of language practitioners in the community and to assure clients of a certain level of competence in the language practitioner they employ" (SATI, 2007e). Accreditation was initially offered only to translators, but has since been expanded to incorporate other fields of language practice, such as language editing and

interpreting. The accreditation offered by SATI is in no way enforceable; however, many employers of language practitioners list accreditation by SATI as a recommendation for language-related positions. This is an important step forward for the professionalisation of the language profession, as it indicates that the employers of language practitioners believe that accreditation is an index of competence.

While SATI's attempts to impose some form of regulation on practising language professionals are necessary and important, there appear to be some difficulties and shortcomings associated with the accreditation offered for editors. SATI represents the interests of a number of different language professions, and therefore its focus is not exclusive to one particular field. Furthermore, SATI is an organisation that is geared primarily towards translators and interpreters (although it should be noted that SATI uses the term "translation" in its widest, most comprehensive sense). Both these aspects may negatively affect the availability (and quality) of support for editors that the organisation may offer.

Another possible shortcoming of the accreditation for editors offered by SATI is that it is focused more on the linguistic dimension of editing, and not necessarily on other aspects of the editing process. SATI does make this explicit by naming this form of accreditation "Language editing accreditation", and therefore indicates that SATI's accreditation for editors does not intend to test dimensions of editing other than the linguistic. However, while the ability to correct language is certainly a crucial part of the editor's job, editors fulfil a number of roles and require a range of extra-textual skills (Mackenzie, 2004:1), such as skills relating to management and liaison, critical thinking, juggling personal and interpersonal relationships, and the effective use of technology (see Kotze, 1997; Du Plessis & Carstens, 2000; Kruger, 2007, 2008; Law & Kruger, 2008).

According to SATI (2007b), the accreditation for editors is run along similar lines as the accreditation for translators. The accreditation exam for editors comprises six texts on a variety of subjects and of differing types (SATI, 2007e). Accreditation candidates are expected to make corrections on the hard-copy exam script only, and are not allowed to complete the test online. This in itself is problematic as online (or electronic) editing is becoming increasingly prevalent in the industry (see Mackenzie, 2004; Butcher *et al.*, 2006), yet the accreditation examination does not test skills associated with electronic editing.

Experienced language editors then mark these scripts on a double-blind basis. Unlike the accreditation for translators and interpreters (which allows for language combinations in all eleven official languages, including French, German, Dutch, Italian, Spanish, Portuguese and Russian) (SATI, 2007e), the accreditation for editors is currently available only in English and

Afrikaans. This means that there is a limited choice of languages for the examination.[8] However, SATI is in the process of making the accreditation examination available in the remaining nine official languages (SATI, 2007e).

A further difficulty relating to the accreditation offered by SATI is that there are no standards for editors in South Africa in place to facilitate this form of accreditation. SATI does have a framework for marking language-editing accreditation examinations. According to SATI (2007b), assessors of the accreditation examination check for "sense and style, consistency, logic, language usage, and grammar, spelling and punctuation". The marking grid for the examination of scripts is based on the marking grid used for translators, which suggests that the form of assessment for the language-editing accreditation examination is based on the indicators of competency from a different field of language practice. SATI indicates that errors are classified into two groups, namely major errors and minor errors. SATI (2007b) classifies major errors and minor errors as follows:

> Major errors: text that is misleading or unclear; amendments that change the meaning of the original; deletion of vital information; inserting information without a basis or that changes the meaning; errors of grammar or syntax; spelling errors that would not be picked up by a spell checker (e.g. *form* for *from*); inconsistencies; non-adherence to accepted conventions.
> Minor errors: missed errors or improvements that render the text slightly less elegant but do not affect its message; minor spelling errors that would generally be picked up by a spell checker.

In addition to classifying the types of errors in an examination paper, SATI indicates that "candidates will fail the editing examination if: there are five or more major errors in the paper as a whole, or two or more major errors in a single question; there are more than ten minor errors in the paper as a whole or more than five errors in a single question" (SATI, 2007b).

This is potentially problematic, as the guidelines for the assessment of the examination scripts and the classification of errors may be regarded as both limited and unclear in outlining what is tested. The guidelines are therefore insufficient in their indication of what amounts to competence. In contrast to this, countries such as Canada and Australia have a set of clear, well-structured standards in place to facilitate the setting of accreditation examinations and to assist accreditation candidates in their preparation for the examination.[9]

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[8] This is most likely because there is limited demand for accreditation in the nine other official South African languages.

[9] The *accreditation* for editors in Canada and Australia will be discussed in further detail in Section 2.4.

While SATI does not have a set of standards for editors, it does have a code of ethics to which all of its members are required to subscribe. There are two main codes of ethics published by SATI: one for individual language practitioners and one for language services agencies. SATI strongly recommends that its members subscribe to the code of ethics and encourages clients making use of SATI members' services to provide feedback on their professional conduct, by emailing or otherwise notifying the SATI office of any unprofessional conduct. However, the code of ethics for SATI members appears to apply to language practitioners in general, and as such does not take into account the unique nuances of each field within language practice. In fact, SATI's code of ethics for individuals makes explicit reference to translators, and not to other fields of language practice such as editing, interpreting, and terminology development.[10] For example, the second and ninth points of the Code of Ethics for Individual Members of SATI (2007c) state:

> 2. To accept full responsibility for their translations and to bring unresolved problems to the attention of their clients/employers
> 9. Always to uphold the highest ethical and moral standards in their dealings with their clients/employers and in the practice of their occupation as translator.

Although the code is intended for all fields of language practice, the specific reference to translation implies that the code may not take sufficient cognisance of the differences between the various fields of language practice (such as interpreting, editing and terminology development). A more focused code of ethics, geared specifically at the editing industry might prove more beneficial for editors than the current code.

PEG has a code of conduct to which its members subscribe (PEG, 2010e). This code of conduct has been developed with editors in mind and is therefore geared specifically towards the work and professional role of the editor. In addition, PEG has also outlined disciplinary rules and procedures for members who do not comply with the code of conduct. A disciplinary committee, comprising the PEG executive and chaired by the PEG chairperson, presides over all disciplinary matters (PEG, 2010e). Disciplinary steps include an oral warning, a written warning, a request for an apology to the complainant, measures to rectify the results of the member's conduct, the removal of the member from any official position within PEG, withdrawal of the respondent's membership of PEG, and publicisation of the offence and outcome (PEG, 2010e). This suggests that PEG's intent is to exercise strict control over its members as far as adherence to the code of conduct is concerned, in order to ensure professionally acceptable behaviour.

[10] However, as stated previously, SATI uses the term "translator" in its broadest sense to incorporate other fields within language practice, such as interpreting, editing and terminology development.

Codes of ethics are important in establishing boundaries for professional conduct, and should be developed based on extensive research and consultation with industry role-players. While PEG does have a code of conduct for its members, no official, legally recognised code of ethics for all South African editors exists. Blaauw and Boets (2000) and Blaauw (2001) have conducted research regarding a code of ethics specifically for editors. This research was conducted in consultation with text editors and with specific reference to codes of ethics used in other fields of language practice. These codes of ethics include the SATI code of ethics for translators; the final version of the code of ethics for interpreters in the health sciences; the professional code of the Belgian Chamber of Translators, Interpreters and Philologists; the International Federation of Translators (FIT) Translator's Charter; the code of professional conduct for individual members of the UK institute of Translators and Interpreters; and FIT's code of conduct for court interpreters (Blaauw, 2001:30). Blaauw (2001:62) emphasises that the main purpose of the research was to "on the one hand *design a code of ethics for text editors*, and on the other hand to do so by *involving text editors themselves in the process*, thus gaining greater acceptance of the code".

The research conducted by Blaauw (2001) is significant, as it focuses not on the larger and more general field of language practice, but on editing specifically. In addition to this, the code developed by Blaauw (2001) represents the responsibilities and interests of editors by taking into account the opinions of practising editors. However, it appears that this code is not generally used within the industry, and for now, most editors subscribe to the codes of ethics associated with SATI and PEG.

Ethical regulation of the editing industry is vitally important for promoting the professional status of the industry. While accreditation provides a point from which competence can be measured, a code of ethics acts as an internal measure of control and is an indispensable form of self-regulation (Blaauw, 2001:11). A generally accepted code of ethics, specifically for editors, is vital for the consistent regulation of the editing industry in South Africa. However, codes of ethics, alone, cannot ensure the regulation of practice and it is therefore vitally important to develop a set of standards for editors, which could act as a guide for practice to be used alongside codes of ethics.

2.2.4 Legal recognition

Language practitioners in South Africa generally work within an exceedingly unregulated and undervalued industry (Du Plessis & Carstens, 2000:62). This is due largely to the fact that, until recently, the industry and the services it provides have had little legal recognition and standing. Towards the end of the 1990s, much research was published dealing with the feasibility of

establishing some form of legal recognition for language practitioners. Most of this research concluded that it would be impossible to implement measures to regulate and protect language practitioners at a legislative level (Combrink & Blaauw, 1998; Kruger *et al.,* 1998). Blaauw (2001:8) explains that this is because "the most important consideration in the granting of a charter by legislation is whether unprofessional conduct in carrying out the relevant activities or services may pose a threat to the life or livelihood of a user of a service".

In 2002, the DAC published the final draft of the NLPF that was approved by Cabinet in 2003 (DAC, 2007:3). The policy framework is "fundamental to the management of diverse language resources and the achievement of government's goal to promote democracy, justice, equity and national unity" (DAC, 2002:3). Essentially the policy framework takes cognisance of the fact that the Constitution recognises eleven official languages, and that all South African citizens have the right to access information in a language of their choice. The implementation of the NLPF is closely linked to the professionalisation of the language professions, since language practitioners contribute directly to the achievement of the policy's aims.

The policy is based on Section 6 of the Constitution, which provides for a legal framework for multilingualism and the development and protection of indigenous languages (DAC, 2002:7-8). The importance of the policy is motivated in the following statement (DAC, 2002:5-6):

> To date management of linguistic diversity in post-apartheid South Africa has been made problematic by the lack of clearly defined language policy, leading to the use of English and Afrikaans as the most dominant languages in the socio-economic and political domains of our society... South Africans have to respond to their linguistic and cultural diversity and to the challenges of constitutional multilingualism, hence the introduction of this National Language Policy Framework.

The policy therefore emphasises the need to implement structures that will facilitate the sustained development of the official languages spoken in South Africa. This has significant ramifications for the language professions, since the services offered by language practitioners will contribute to ensuring the success of the policy. In fact, in order for the policy to be effectively implemented, the industry needs to be professionalised, training needs to be standardised, more training opportunities need to be made available, and a professional association that regulates the work of language practitioners needs to be established. To achieve this, the implementation plan for the policy states that "in addition to the existing PanSALB language infrastructure, the structures that must be established to manage the implementation of the Language Policy are language units, a National Language Forum and the South African Language Practitioners' Council" (DAC, 2003:11).

As mentioned in Section 2.2.2, the establishment of the South African Language Practitioners' Council will be a significant step forward for the industry. More specifically, the passing of the SALPC Bill will immediately have the effect of establishing legal recognition of the language professions. According to the DAC (2003:26) the council should have been established between October 2003 and 2004; evidently this has not happened. According to Boers (2007), the bill was supposed to be submitted to serve before the National Assembly between late 2006 and early 2007. This also appears not to have taken place. Perhaps the DAC underestimated the time it would take to implement the National Language Policy (NLP) and its structures, but what remains clear is that the future of the language professions is strongly dependent on the successful establishment of the South African Language Practitioners' Council.

The four aspects of the editing industry (training, professional association, regulation and legal recognition) discussed in this section are areas of the industry that will, if managed appropriately, greatly contribute to professionalisation. However, this is dependent on the establishment of a set of standards. Standards for the industry and practice will assist in the regulation of training and professional conduct, and will provide important foundations for the establishment of a legally recognised professional association.

2.3 STANDARDS DEVELOPMENT AND THE NEED TO STANDARDISE THE SOUTH AFRICAN EDITING INDUSTRY

Standards are of vital importance in any industry and serve a number of important functions: they provide clear boundaries for practice; set expectations for clients and users of the industry; establish guidelines from which curricula for training are set; and are used as a point from which to differentiate competent practitioners from incompetent practitioners. Standards are clearly central to the regulation and professionalisation of an industry. However, standards are not easily developed, since it is difficult to determine which standards are vital for the efficient regulation of an industry: What counts as a standard and what does not? The International Organisation for Standardisation (ISO) (ISO/IEC, 2004:3) defines a standard as:

> A document, established by consensus and approved by a recognized body, that provides, for common and repeated use, rules, guidelines or characteristics for activities or their results, aimed at the achievement of the optimum degree of order in a given context... Standards should be based on the consolidated results of science, technology and experience, and aimed at the promotion of optimum community benefits.

The development of standards is a complex process that needs to be conducted in consultation with experts, scholars and practitioners, and should accommodate the uniqueness of the

context in which the standards will function in order to meet the specific requirements of the industry users and service providers to promote "optimum community benefits".

Currently there are no comprehensive and generally accepted standards for the South African editing industry. SATI and SAQA have guidelines facilitating their forms of regulation, but clearly these guidelines do not conform to the definition of a standard outlined above. The lack of a comprehensive set of standards presents a number of challenges for editors, and has significant ramifications for the industry. Furthermore, the editing industry has struggled to achieve recognition for the important role that it plays within the community. This is mostly due to the fact that not many people outside the industry are sure what exactly the role of the editor entails. For example, many regard the role of the editor as limited to the correction of spelling and grammatical errors. This misperception makes it difficult for editors to gain recognition and sometimes even sufficient remuneration for their work. Such misperceptions are exacerbated by the fact that editors work within a largely unregulated industry. Du Plessis and Carstens (2000:62) assert that because the editing industry is unregulated, any person (regardless of competence) can work as an editor. This places enormous pressure on editors, as qualified and competent editors have to compete with incompetent and unqualified editors for work in an industry where clients are often inclined to simply settle for the lowest price – without any way of assessing the quality of work they receive at a particular price. Also, unqualified and incompetent editors lower standards and clients' expectations, which have the potential effect of undermining the perceived importance of having documents edited professionally.

Partially as a result of these misperceptions, the editing industries in a number of countries (such as Australia, Britain and Canada) have identified the need to standardise editing practice, and have subsequently developed standards specific to their industries. The development of editing standards in these countries has proved to be beneficial in raising the professional status of the industry and establishing regulatory measures that have normalised expectations as well as practice. However, the development of these standards in the various countries suggests that standards cannot simply be replicated and applied to the same industry of a different country.[11] Instead, each country has addressed what the particular needs of its industry are, and incorporated these needs into a set of standards tailor-made for its context.

The need to standardise the South African editing industry is becoming increasingly pressing, particularly when the lack of professional status accorded to editors is taken into consideration (Kruger *et al.,* 1998; Blaauw & Boets, 2000; Du Plessis & Carstens, 2000; Blaauw, 2001). More importantly, the invaluable role that language practitioners play within the multilingual South

[11] The differences in the standards developed for editors in different countries will be discussed in further detail in Section 2.4.

African context is being brought to the fore by the implementation of the new NLP. Now more than ever, the editing industry needs to be standardised, as a step towards the success of the NLP.

This success is directly linked to the development of standards, as the NLP has the potential to increase the number of jobs available to editors, particularly in languages other than Afrikaans and English. Consequently, more editors will need to be trained, and guidelines for practice will have to be set. In addition to this, the NLP envisions professionalising the industry by regulating and limiting entry into the industry. These steps will certainly contribute greatly to the professionalisation of the editing industry; however, none are possible without standards to guide these processes.

The outline for the process of professionalisation provided by Séguinot (2008) clearly delineates the various stages that an industry goes through in order to implement systems for professionalisation. According to Séguinot (2008:3) these stages are:

1. training is formalised in tertiary environments,
2. standards for practice are set and/or get higher,
3. professional associations representing the industry are established,
4. regulatory measures in the form of accreditation and codes of ethics are established and set, and
5. legal recognition is obtained through limiting the right to use a professional title or licensing members of the industry.

The analysis of the professional status of the South African editing industry, compared with the stages of professionalisation discussed by Séguinot (2008), suggests that there are some shortfalls in the attempts to professionalise the industry. Most significant is the absence of clear standards, which impacts on the various stages of professionalisation.

The training of editors in South Africa has, at least to some degree, moved to universities, and degrees specialising in editing and language practice have been developed. However, these degrees and the skills associated with obtaining them are not regulated, and so the structure and outcomes for each degree varies from institution to institution.[12] This could be attributed to the fact that currently there are no standards for editorial practice in South Africa.

[12] See Section 2.2.1 for an example of the differences between two degrees in Language Practice offered at two South African universities.

Professional associations have been established (such as SATI and PEG). However, as discussed above, there are some difficulties that these associations will need to overcome if they are to play their potential role in the professionalisation process optimally. In terms of regulation, a system of accreditation for editors has been established through SATI, but this system of accreditation does not test the full range of skills associated with an editor's job and is not based on a clearly delineated set of standards formulated specifically for the needs of South African editors. SATI also has a code of ethics, but this code is aimed broadly at the field of language practice (with a strong focus on translation) and consequently is not geared specifically towards editors. PEG is currently developing its own system of regulation, but it remains to be seen what this system will entail and on which guidelines this form of regulation will be based. PEG also has a code of conduct and rules for disciplinary procedures. The steps that PEG is taking toward some form of regulation of its members, suggests that PEG now finds itself in a transitional phase, and is becoming more than an informal support group for editors. The establishment of the South African Language Practitioners' Council through the NLPF is a significant step forward for editors and would go some way towards contributing to the professionalisation and legal recognition of the industry, but this council is yet to be established.

The analysis of the professional status of the South African editing industry has demonstrated that there is still some way to go until the industry is sufficiently regulated and professionalised. However, it must be noted that the steps towards professionalisation, taken by institutes such as SATI and PEG, suggest that various forms of regulation, albeit self-regulation and informal accreditation, are becoming increasingly important for the South African editing industry. The important role that standards may play in contributing to the professionalisation of the industry should not be underestimated, as the presence of standards in an industry is a milestone for implementing and sustaining regulation processes. This is evident in the progress made towards the professionalisation of the editing industries in countries such as Canada, Britain and Australia.

2.4 CASE STUDIES: THE DEVELOPMENT OF EDITING STANDARDS IN CANADA, BRITAIN AND AUSTRALIA

The situations in Canada, Britain and Australia offer good examples of progress made towards the development of a set of professional editing standards. The Editors' Association of Canada (EAC), the Institute for Professional Editors' in Australia (IPEd) and the Publishing Training Centre (PTC) in Britain have all established a set of editing standards that are recognised within their respective industries. Furthermore, all of these organisations have been successful at establishing some form of nationally recognised regulation, standards and accreditation.

2.4.1 The Editors' Association of Canada

EAC is the most prominent association for editors in Canada. Previously known as the Freelance Editors' Association of Canada, EAC is incorporated federally as a not-for-profit organisation and is governed at a national level by an executive council (EAC, 2008). Membership of EAC is voluntary, and it therefore serves a similar purpose for editors in Canada as SATI does for translators in South Africa. However, the association is aimed exclusively at editors.

The association fulfils a number of roles within the industry, some of which include sponsoring professional development seminars, promoting and maintaining high standards of editing and publishing in Canada, establishing guidelines to help editors secure fair pay and good working conditions, helping both in-house and freelance editors to network, and cooperating with other publishing associations in areas of common interest (EAC, 2008). In addition, EAC also offers its members Professional Indemnity and Commercial General Liability coverage which is designed to assist and protect editors "against claims brought by third parties for compensatory damages" (EAC, 2009a).

Over the years EAC has played an important role in raising the professional status of editors in Canada. In 1991, the Freelance Editors' Association of Canada published their *Professional Editorial Standards* (PES). These standards were revised in 1999 and more recently in 2009 by EAC, and have since been republished. EAC (2009b) explains the reason for the development of these standards:

> *Professional Editorial Standards* is a pivotal document for EAC and for the editing profession. It sets out what editors do when performing various stages of editing. It tells employers what to expect from the editors they hire. It shows new editors the range of skills and knowledge they should aspire to. It helps EAC, post-secondary institutions, and other training providers design material, seminars, and courses on editing. And it's the foundation on which EAC's professional certification of editors is built.

The standards for editing developed by EAC list skills that are necessary for all editors on the basis that the fundamental tasks and skills associated with all forms of editing are the same. In the 2009 revision of the standards, EAC categorises these fundamental tasks and skills into five standards: The Fundamentals of Editing, Structural Editing, Stylistic Editing, Copy Editing, and

Proofreading (EAC, 2009b).[13] The standards document further categorises the tasks and skills subsumed by each standard.[14] These categories are listed as follows:

A. The Fundamentals of Editing

- Knowledge
- Practices

B. Standards for Structural Editing

- Assessment
- Organisation
- Content
- Communication

C. Standards for Structural Editing

- Clarity
- Flow
- Language
- Communication

D. Standards for Copy Editing

- Correctness
- Consistency
- Accuracy and completeness
- Communication

E. Standards for Proofreading

- General practices
- Error correction
- Judgement
- Communication

[13] For more information on the standards contained in Professional Editorial Standards see www.editors.ca.

[14] PES 2009 differs from the 1999 edition in a number of ways. Firstly, the standards have been revised and reworded to reflect current technologies. Secondly, PES 1999 combined the standards for structural and stylistic editing. PES 2009 separates structural and stylistic editing into two individual standards. Lastly, PES 1999's Standards for Elementary Knowledge of the Publishing Process has been changed to The Fundamentals of Editing, and is now the first standard in PES 2009.

EAC (2009b) emphasises that the standards are based on the Canadian editing industry, and that certain tasks and skills not included in the document might play a more significant role in the editorial working environment in other countries. In addition, EAC emphasises that these standards reflect the capabilities of all editors and therefore represent the essential tasks and skills associated with all types of editing, although they may be of more or less significance depending on the type of editing work being done. The standards were developed specifically for the editing of English-language media (EAC, 2009b), thus excluding editors working in French, the other main language spoken in Canada.

The development of these standards for Canadian editors has contributed significantly to the steps taken to establish a system of accreditation. The standards formulated in 1999 were incorporated into a series titled *EAC Certification: Study Guides and Exemplars* (EAC, 2008). There are four study guides in total, each dealing specifically with one of the four standards outlined in the previous version of PES. The study guides contain information pertaining to the application of the standards, and provide examples of how the standards are tested in the accreditation examinations. According to EAC (2009c), new study guides for PES-2009 will be phased in over three years with the guides for copyediting[15] and proofreading being released in June 2010, stylistic editing in 2011 and structural editing in 2012.

The system of accreditation for editors offered by EAC is available to both members and non-members of EAC. Accreditation is obtained through a written examination, and is offered at various levels. Based on PES-2009, five types of credentials will be offered (EAC, 2009d):

Credential	Required tests
Certified Structural Editor	Structural Editing
Certified Stylistic Editor	Stylistic Editing
Certified Copy Editor	Copy Editing
Certified Proofreader	Proofreading
Certified Professional Editor (CPE)	Structural Editing, Stylistic Editing, Copy Editing and Proofreading

Table 2.1: Credentials for editors offered by EAC

The various forms of accreditation offered by EAC are in no way enforceable, and it is up to editors to decide whether the accreditation offered is valuable or not. According to Aalto (2008),

[15] The spelling of the term "copyediting/copyeditor" in the literature is highly variable. Some authors refer to "copy editing", while others prefer "copy-editing" or "copyediting". As this is largely a matter of preference, this study will use the spelling "copyediting" and its derivatives.

since the launch of the accreditation examination in 2006, EAC has accredited 23 certified proofreaders and 11 certified copyeditors. In addition, twice as many people registered for the certification examination in 2008 compared to in 2007. EAC clearly plays a meaningful role within the Canadian editing industry, as it currently has over 1800 members (EAC, 2008).

The Canadian situation demonstrates that a system of accreditation greatly relies on the development of standards. However, it seems that the accreditation of editors (in certain contexts) does not need to be enforced at a legal level if members of the industry and the users of the service deem the available accreditation sufficient in establishing competence.

2.4.2 The Publishing Training Centre in Britain

In the 1980s, the British government required all industry sectors to establish a representative body. These representative bodies were required to establish standards for the industry (PTC, 2005). These standards would act as guidelines for practice for employers and employees. Book House Training Centre, the National Training Organisation (NTO), and the representative body for the publishing industry established the National Occupational Standards for publishing.

PTC, previously known as Book House Training Centre, is an educational charity dedicated to the pursuit of excellence in publishing (PTC, 2008a). PTC is the best-known publishers' association in the United Kingdom, and works with overseas associations as well. Predominantly a training centre focusing on core editorial skills for book and journal publishing, PTC also offers a number of open courses covering a complete range of publishing skills, which include IT and electronic publishing. Some other activities of the centre include education and publishing partnerships, the development of National Occupational Standards, and representation to government (PTC, 2008a).

In 1992, Book House Training Centre published the first National Occupational Standards for Publishing. Since then, the standards have been reviewed three times. PTC published the latest edition of the standards in 2005. These standards are recognised within the industry, and are used by employers and employees to assess performance. PTC encourages the employers of editors to assess editor performance: one of the most valuable uses of the Occupational Standards is for the assessment of a person's performance in a particular job. Because the standards are based on the industry's requirements for abilities, skills and knowledge, they provide an objective and directly relevant measure for employers and employees alike (PTC, 2008b). This form of assessment is entirely up to individuals, and is guided by the standards

listed in the National Occupational Standards for Publishing. This means that accreditation is not required; rather, assessment reports provide details about an editor's competence.[16]

The standards involve eight main categories of skills that apply to the publishing industry, with the different categories being of greater or lesser importance to the various role-players in the industry. Each category contains a number of units, which are further categorised into elements. The elements each contain two sets of criteria, one describing what the role-player should do, and the other describing what knowledge the role-player should have. PTC (2005) categorises the standards into the following units:

Commissioning and acquisitions

- UNIT 1 Identify and evaluate markets, publishing priorities and resources
- UNIT 2 Develop publishing proposals
- UNIT 3 Develop and maintain a plan of publishing
- UNIT 4 Collaborate with authors, contributors, developers and providers of material for publication

Rights

- UNIT 5 Establish potential for rights sales
- UNIT 6 Sell primary rights prior to publication
- UNIT 7 Sell secondary and subsidiary rights after publication
- UNIT 8 Negotiate rights agreements
- UNIT 9 Administer and monitor rights agreements

Contracts

- UNIT 10 Review and prepare contracts
- UNIT 11 Control internal administration of contracts
- UNIT 12 Advise on legal and contractual matters

Design (visual)

- UNIT 13 Formulate and present visual design proposals
- UNIT 14 Produce a visual design specification
- UNIT 15 Implement visual design specifications

Editorial management of print and electronic publishing projects

- UNIT 16 Manage editorial projects
- UNIT 17 Manage editorial budgets
- UNIT 18 Control editorial quality

[16] For more information on the assessment of editor performance in Britain see www.train4publishing.co.uk/occstd/assess.

Design (structural)

- UNIT 19 Formulate and present structural design proposals
- UNIT 20 Produce a structural design specification
- UNIT 21 Implement structural design specifications

Editing

- UNIT 22 Edit text
- UNIT 23 Edit tables, academic apparatus and indexes
- UNIT 24 Edit images
- UNIT 25 Proofread text and collate corrections

Production

- UNIT 26 Estimate and control production costs
- UNIT 27 Estimate and control electronic publication costs
- UNIT 28 Create and control production and publication schedules
- UNIT 29 Control new title production
- UNIT 30 Control reprints
- UNIT 31 Purchase print and materials
- UNIT 32 Control electronic publications

Marketing and direct sales

- UNIT 33 Investigate opportunities for publishing
- UNIT 34 Plan marketing for publishing products
- UNIT 35 Create appropriate marketing tools for publishing products
- UNIT 36 Organise publicity and public relations for publishing
- UNIT 37 Organise and run a direct marketing campaign for publishing products
- UNIT 38 Organise marketing events to promote publishing products
- UNIT 39 Direct sales and customer care and support.[17]

Clearly the National Occupational Standards for Publishing is comprehensive in its outline of knowledge and skills associated with the publishing industry in Britain. This is evident in the following statement by PTC (2008c):

> Occupational competence is not just concerned with the ability to carry out publishing functions: it includes requirements such as the ability to organise and manage workflow; to set priorities and meet deadlines; to identify clearly the problems that arise and use personal initiative to solve them; to establish and maintain good working relationships; and to be able to operate in a same environment.

[17] For more information on the standards contained within the National Occupational Standards for Publishing see www.train4publishing.co.uk.

However, as mentioned previously, these standards serve the broader publishing industry, and therefore, only certain units apply directly to the work of an editor. Perhaps the most valuable aspect of the PTC's standards document is that it provides a comprehensive explanation of the activities and knowledge required to perform and meet the standard. For example, Unit 22 deals with editing text, and contains eight elements. PTC (2005) lists these elements as:

22.1 Assess text
22.2 Website software
22.3 Copy-edit text
22.4 Prepare preliminary pages
22.5 Prepare explanatory, navigational and descriptive content for electronic publishing
22.6 Ensure text conforms to legal requirements
22.7 Mark up text for typesetting externally or page make-up internally
22.8 Encode and structure content for electronic publications.

Each element is further defined by two sets of criteria: the skills the editor should possess, and the type of knowledge the editor must have in order to meet the requirements of the element. For example, PTC (2005) lists the following skills and types of knowledge as key for element 22.1, *Assess text*:

You must be able to:

- check that the material, its metadata, encoding, mark-up and/or structure complies with specifications and notify the appropriate individuals of any deviation
- identify missing items or content elements and take appropriate action to obtain them
- ensure that folios are numbered consecutively throughout the script
- ensure that files or content elements are named in accordance with the agreed naming conventions
- ensure all assets (including files and content elements) are supplied and present and supply a list of files
- establish overall extent accurately
- check that material is in a format suitable for the production processes being used, and the hard copy matches the electronic version, if supplied
- assess whether you can complete the editorial work to the required standard in the time allocated, and take appropriate action if the schedule is not feasible.

You need to know:

- the contractual specifications of extent, content and level
- the production processes being used, including electronic processes

- common editorial problem errors encountered when editing on screen, e.g. character and font substitution, character sets, special sorts, special or non-printing characters, non-text items, etc.
- the agreed guidelines on naming, formatting, structuring, encoding and marking up text and indexing files on disks, in electronic file repositories, in content management systems, management information systems or XML solutions
- the distinction between and implications of working on manuscripts and typescripts to be keyboarded for typesetting, working on hard copy produced from a disk or electronic file that is intended to be used for typesetting externally or page make-up internally, and working on screen, and take steps in the process to ensure high editorial quality regardless of the procedure or tools used
- the nature and requirements of the market(s) for which the work is intended
- the house style of the organisation and the specific style of the project, including accessibility, usability, interactivity and metadata guidelines for electronic publications
- what templates and stylesheets should be applied to the text, as necessary, and/or generic coding or mark-up
- what file management procedures and techniques are appropriate, including working with current files, making and keeping back-up copies, and when to delete obsolete files
- the schedule, the implications of slippage, and when and with whom to discuss schedule problems.

The distinction between ability and knowledge is a useful way of demonstrating that editing involves a number of skills, but also requires specialised knowledge. Furthermore, the way in which the distinction between ability and knowledge is delineated implies that there is a strong relationship between practice and theoretical knowledge.

The British example demonstrates that standards are a prerequisite in determining the competence of an editor's work. Well-formulated standards may act as a benchmark for practice, and will assist in determining competence. Furthermore, the standards used in the British publishing industry guide an individual form of continuous assessment that may replace a system of accreditation.

2.4.3 The Institute for Professional Editors in Australia

Australia has made much progress in terms of professionalising and standardising its editing industry. This progress includes the publication of editing standards and the development of a nationally recognised accreditation scheme. In 2001, the Council of Australian Societies of Editors (CASE) published the first edition of Australian Standards for Editing Practice (ASEP). The standards were compiled by the CASE Standards Working Group.

The Standards Working Group was founded in 1998, and was tasked with the responsibility of developing a set of standards for Australian editors. In consultation with EAC, the Canberra Society of Editors, and various members of the Australian Societies of Editors, the Standards Working Group drafted the ASEP document, which was endorsed and published by CASE in 2001 (CASE, 2001:i). CASE (2001:i) motivates the importance of ASEP for the industry in the following statement:

> These standards have been developed for editors to use; as a basis for judging the comprehensiveness of their own knowledge and skills, [and] when promoting themselves and the editing industry generally. They will also help publishing clients understand the range of services editors provide, and guide educational institutions in developing editing courses.

One of the aims of ASEP is therefore to promote the professional status of editors in Australia. Also, ASEP is unique in the sense that it takes cognisance of the various roles that editors fulfil, and foregrounds the array of skills required to be an editor in any sector of the industry. The Society of Editors (South Australia) (2001:1) says the following in this regard:

> The standards depart from the traditional division of editing into structural or substantive editing, and copy editing and proofreading; instead they emphasise the place of the editor's work in the context of the entire publishing process. The scope of the standards recognises that the practice of editing is not confined to working with a manuscript in isolation.

The fact that these standards conceptualise the role of the editor as involving multiple functions is significant, echoing research exploring the multiple functions and roles of the editor (see, for example, Kotze, 1997; Du Plessis & Carstens, 2000; Blaauw, 2001; Law & Kruger, 2008; Carstens & Van de Poel, forthcoming).

ASEP contains five main standards, with each section outlining a number of related sub-standards. For each main standard a brief description of the importance of the standard is given, while each sub-standard provides a summarised list of the tasks and skills associated with each standard. A brief summary of ASEP (CASE, 2001) is provided below, indicating the comprehensive range of skills covered:

A The publishing process, conventions and industry practice

- A1 Overview
- A2 Editing and proofreading
- A3 Legal and ethical concerns

- A4 Design, typography and formatting
- A5 Technology relevant to editing practice
- A6 Reproduction

B Management and liaison

- B1 Project definition
- B2 Project documentation
- B3 Monitoring

C Substance and structure

- C1 Appraisal
- C2 Techniques

D Language and illustrations

- D1 Clarity
- D2 Voice and tone
- D3 Grammar and usage
- D4 Spelling and punctuation
- D5 Specialised and foreign material
- D6 Illustrations and tables

E Completeness and consistency

- E1 Integrity
- E2 Tools and procedures
- E3 Text
- E4 Illustrations and tables
- E5 Format, layout and reproduction.[18]

The development of ASEP proved to be an important milestone in the professionalisation of the Australian editing industry, as it led to the establishment of a unique accreditation process. In 2001, after the publication of ASEP, CASE launched the Accreditation Working Group (AWG). The AWG comprised representatives from all the states and territories, and was tasked with the job of investigating why the accreditation of editors is necessary and which principles should underlie any accreditation system (CASE, 2002:1). The point of departure for the implementation of an accreditation system was that it would provide a number of benefits for the editing industry. These potential benefits are listed by CASE (2002:1-2):

[18] For more information regarding the standards outlined in ASEP see www.editors-iped.org and Mackenzie (2004).

> The development of ASEP means that the profession has an agreed upon level of performance, and an accreditation system would establish a recognised process to support that standard; an accreditation system will provide some assurance of a satisfactory level of performance; accreditation will raise the prestige of the profession in the industry and more generally; and, accredited editors could expect improved rates of remuneration – rates genuinely commensurate with the skills deployed.

The AWG began its investigation in 2002, and eventually (through extensive consultation with various role-players) established that the accreditation process would be best served by two different types of accreditation. The proposed accreditation scheme involved accreditation through an examination and accreditation through the submission of a portfolio. Furthermore, the AWG also suggested that in order for the accreditation of editors to be managed successfully a body governing the professionalisation of the editing industry had to be founded. This led to the establishment of IPEd.

IPEd is a national organisation that is concerned with all matters of interest to Australian editors and endeavours to protect and promote the editing industry in Australia. IPEd was established in October 2005, at a national conference in Melbourne, and in May 2007, members of all the state and territory societies voted on and passed a proposal to establish IPEd, a company limited by guarantee (Society of Editors (SA), 2008:1). The functions of IPEd include the administration of a national accreditation process, the review and maintenance of editorial standards, interactions with educational institutions, and initiatives such as a biennial conference (IPEd, 2007).

IPEd played an active role in the development of an accreditation scheme, and in 2007 all editors' societies in Australia voted on a proposal for a revised accreditation scheme. According to the Society of Editors (SA) (2008:1) the motion stated that "the national accreditation scheme will have two levels: Accreditation, achieved by examination, and Advanced Accreditation, achieved by portfolio". The accreditation board scheduled the first accreditation examination for 18 October 2008.

The situation in Australia proves to be a valuable example for the South African editing industry. It not only demonstrates that steps can be taken to promote the professional status of editors, but, more importantly, it suggests that the development of standards for the editing industry is valuable as it contributes directly to the process of professionalisation, and serves as a point from which other structures, such as accreditation, can be implemented. In addition, the Australian example demonstrates that a two-pronged approach to accreditation may have several advantages, such as the fact that it reflects the editor's skills and abilities as they evidence in actual practice. However, it is important to note that for this type of approach to

accreditation, the two dimensions (accreditation through examination and accreditation through portfolio submission) are mutually dependent and equally indispensible.

The three case studies in this section suggest that the editing industry, globally, is in the process of being professionalised, although none of these organisations are statutory bodies: IPEd is a company limited by guarantee and is subject to the Corporations Law of Australia (IPEd, 2008); EAC is an association incorporated federally as a non-profit organisation and is governed at a national level by a executive council (EAC, 2008); and PTC is an education charity that occasionally liaises with the British government (PTC, 2008a). The three case studies also demonstrate various possibilities for the development of standards. Each organisation has employed a different method of regulating language practitioners in its country, and each has developed unique ways of establishing some form of regulation within their industries. This clearly demonstrates that there are a number of ways to develop and use standards, and establish accreditation processes that suit the needs and requirements of the industry's practitioners and service users. Despite these differences, it is also clear that the formulation of standards has, in each instance, contributed significantly to promoting and regulating the editing industry. These examples reveal that while each country is unique in terms of the management of its editing industry, the development of standards for practice is universally regarded as vital in establishing regulatory measures such as accreditation and registration.

The three case studies discussed in this section have provided good examples of what is happening in terms of regulation in the editing industries of other countries. However, an analysis of regulation in other fields of language practice may also prove beneficial for this study, as it might provide useful insights and possibly alternative views on how this process is being managed in these industries.

2.5 REGULATION IN OTHER FIELDS OF LANGUAGE PRACTICE

Translation and interpreting are two of the language professions that have received much attention in terms of professionalisation at a national and international level. Much research has been conducted on the professionalisation of translation and interpreting (see, for example, Mikkelson, 1999; Abraham & Weston, 2004; Valero-Garcés & Taibi, 2004; Orban 2008) in addition to the numerous practical steps that have been taken to ensure the raised professional status of these industries. A brief discussion of this may suggest some requirements and benefits for the regulation of the editing industry in South Africa.

The International Federation of Translators (FIT) is a good example of the professional collaboration of translators and interpreters at a national and international level. FIT is a non-political international federation of translators' associations that represents the moral and material interests of over 60 000 translators (FIT, 2010a).[19] FIT (2010a) has the following objectives:

- To bring together associations of translators and to promote interaction and co-operation between such associations;
- To sponsor and facilitate the formation of translators' associations in countries where they do not already exist;
- To establish links with other organisations devoted to translation or other aspects of interlingual and intercultural communication;
- To develop and maintain among all member organisations such harmony and understanding as will promote the interest of translators;
- To provide member organisations with such information and advice as may be useful to them;
- To promote training and research;
- To promote the harmonisation of professional standards;
- To uphold the moral and material interests of translators throughout the world, advocate and advance the recognition of their profession, enhance their status in society and further knowledge and appreciation of translation as a science and an art.

In addition to this, FIT has a number of specialised committees (for example, the FIT committee for Information on the Status of the Translation and Interpreting Profession) that conduct and publish research dealing with various issues surrounding the industry.

FIT therefore serves an important role in the translation and interpreting industry globally, and has contributed significantly to the professionalisation of the industry, most notably through the adoption of the UNESCO Recommendation on the Protection and Improvement of the Legal and Social Status of Translations and Translators in Nairobi in 1976 (FIT, 2010a), and the adoption of The Translator's Charter, which was approved by the FIT Congress at Dubrovnik in 1963 and later amended in Oslo on 9 July, 1994 (FIT, 2010b).

Some national associations for translators and interpreters that are members of FIT and that have made progress towards the professionalisation and regulation of the translation and interpreting industry are the American Translators' Association (ATA) of the United States of

[19] FIT uses the term "translator" to refer to those "persons who practise translation in all its forms, written or spoken, including those specialising in one of the elements of translation process or in research or education" (FIT, 2010a).

America (USA), the National Accreditation Authority for Translation and Interpreting (NAATI) and the Australian Institute for Interpreters and Translators (AUSIT) of Australia, and SATI of South Africa.

ATA is a professional association for translators and interpreters that is based in the USA but makes its membership available in over 90 countries. ATA endeavours to "advance the translation and interpreting professions and foster the professional development of individual translators and interpreters" (ATA, 2008a). ATA is not a statutory body, and its membership and certification are not a prerequisite for entry into the translation and interpreting profession. However, according to Mikkelson (1999) the regulation of court interpreting was initiated by the legislatures at the federal and state levels.

In addition, ATA's certification programme is well structured and enforces a system of continuous education. Certification is initially obtained through an open-book written examination. Once a candidate has been certified by ATA, s/he needs to maintain his/her certified status by accumulating 20 points of continuing education credit over a three-year period (ATA, 2008b).[20] What is significant about ATA's system of accreditation is that it is not supplemented by a recognised set of standards, suggesting that candidates do not have standards to guide their preparation for the examination. ATA does, however, make practice tests available, although this is less useful than an explicit set of standards that may be used to benchmark competence. In addition, ATA (2008b) does provide a list of categories of errors that is used by graders when marking the examination scripts, and suggests that candidates for accreditation study these categories of errors. To some degree, the descriptions of these categories do provide some indication of the standards used in assessment, even if these standards are not made explicit.

While this classification of errors is useful for preparation, it is not a list of prescriptive standards and is limited in its delineation of errors. The low overall pass rate for ATA's accreditation examination, which is below 20% (ATA, 2010), may possibly be ascribed to the fact that standards for practice do not exist or are not made available. This, again, suggests that while the industry is cognisant of the importance of regulation, standards guiding this regulation process have not always been established. Despite the fact that no clear standards for ATA's accreditation exist, it is notable that the system of certification places emphasis on the idea of continuing professional development, forcing its members out of complacency and ensuring that certified members continue to maintain, hone and expand their skills.

[20] For more information on ATA's certification programme, see www.atanet.org.

Overall, it seems that ATA is very similar to SATI. Both institutes are not recognised at legislative level, and both offer accreditation examinations that do not appear to be guided by an explicit set of standards. Both, however, do offer legally recognised accreditation for more specialised forms of translation (such as court interpreting for ATA and sworn translation for SATI).

NAATI and AUSIT of Australia have made much progress in terms of professionalising the translation and interpreting industry of that country. NAATI is the generally accepted national standards body for the translation and interpreting profession in Australia (NAATI, 2007:2) and coordinates and administers accreditation and professional recognition. Although NAATI strongly recommends that translators and interpreters become accredited, it is not required by law.

NAATI offers four main types of accreditation per field (that is translation or interpreting): paraprofessional, professional, advanced, and senior (NAATI, 2007:3).[21] NAATI accreditation can be obtained by passing the NAATI test, by successfully completing a course of studies in translation and interpreting at an Australian institute as approved by NAATI, or by providing evidence of specialised qualifications in translation or interpreting obtained from a recognised training institution overseas or membership of a recognised international professional association (NAATI, 2007:14). As with ATA, NAATI does not have explicit standards that guide the accreditation process; although NAATI does provide a somewhat limited outline of what is expected of practitioners at each accreditation level (NAATI does refer to this outline as standards).[22]

In the case of the translation as well as the interpreting industry much research has been conducted on the professionalisation, standardisation and regulation of the industries. In addition, the existence of international associations such as FIT, and national associations such as ATA and NAATI, who support and promote the translation and interpreting industry, demonstrates that this industry has achieved similar levels of success in terms of professionalisation as other fields of language practice (such as the field of editing). Despite the advances made by these organisations with regard to accreditation, none of the organisations investigated in this section have an explicit set of standards that guides the accreditation process. This is an interesting finding, as it suggests that the translation and interpreting profession in the countries investigated is not guided by a set of standards, while the editing industry in some of these countries (e.g. Australia) is. The analysis in Section 2.4 suggests that the editing industry in other countries recognises the importance of standards for an industry,

[21] See NAATI (2007) for the definitions of the credential categories for translators and interpreters.

[22] For more information on NAATI's standards for translation and interpreting, see www.naati.com.

not only to serve as guidelines for practice, but also to provide a point from which competence can be measured.

2.6 CONCLUSION

The primary purpose of this chapter has been to discuss the issues surrounding the standardisation of the South African editing industry and to investigate the impact of standardisation on the professional status of editors in South Africa and internationally. The discussion in this chapter found that in order for the South African editing industry to best implement appropriate training and accreditation processes, standards for South African editors will have to be established.

The need to develop professional standards and the impact that they will have on the industry have been discussed, with specific reference to four dimensions in which the development of professional editing standards may prove to be particularly beneficial. These dimensions include the training of editors, the establishment of professional associations, the regulation of editors in terms of accreditation systems and codes of ethics, and legal recognition for qualified editors. According to Séguinot (2008:3), these four dimensions are the most important for the professionalisation process. The analysis of these dimensions has indicated that the South African editing industry is in the process of being professionalised, but that any further progress is dependent on the development of an accepted set of standards. The overview of these dimensions of the industry has revealed that degrees dedicated to the field of language practice are now offered at a number of higher-education institutions, but these degrees are far from standardised and so editors receive different training at different institutions, and therefore enter the industry with varying sets of skills.

In terms of professional organisations, SATI and PEG are the two most prominent associations for editors in South Africa. Both organisations offer some form of regulation by way of codes of ethics and accreditation (or continued professional development programmes for PEG), but this is not enforceable and is therefore just a form of self-regulation. In addition, the accreditation offered by these two associations is not supplemented by a set of clear standards, indicating that the accreditation processes are limited in their approach to determining competence.

Three case studies of the editing industry in Canada, Britain and Australia have demonstrated that each of these countries' editing industry is well regulated (although not at a legal level). Each industry has developed standards that underpin accreditation processes, indicating that standards for editors are essential for the professionalisation and regulation of the industry. In addition, the analysis of each of these countries' editing industries has demonstrated that

standards are unique to the industry's context, and that there are various ways in which standards may be developed, implemented and used to establish accreditation or regulatory processes.

Finally, examples of regulation in other fields of language practice, particularly translation and interpreting, have been discussed, with the aim of highlighting the professionalisation process. A key point of these case studies is the suggestion that the editing industries of other countries are far more advanced than the translation and interpreting industries, particularly with regard to the development of standards. Nevertheless, the discussion of the examples of regulation in other fields of language practice has demonstrated that the language professions are working towards professionalisation, specifically with regard to ensuring that accreditation processes are in place.

The following chapter delineates the various sectors of the South African editing industry, and analyses the tasks and skills for editors associated with each sector. Chapter 3 therefore seeks to identify which tasks and skills are central to the editor's job and will form the basis of the empirical research.