



ISO TC 46
"Information and documentation"

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ISO/TC 46/SC 9 Secretary and TC 46/SC 9/WG 7 Convenor responses to the claims in the AFNOR appeal (ISO/TC 46 N2224)

COMMENTARIES/ DECISIONS

This document is ISO/TC 46/SC 9 responses to AFNOR appeal submitted by AFNOR to the ISO/TC 46 Secretary last 29th September 2009 (see ISO/TC 46 **N2224**) against ISO/DIS 26324 "Information and documentation - Digital object identifier system" developed by ISO/TC 46/SC 9 (see ISO/TC 46 **N2225**).

This zip contents two documents:

- **"091106_Response to AFNOR appeal.pdf"** is TC 46/SC 9 Secretary and TC 46/SC 9/WG 7 Convenor responses to the claims in the AFNOR appeal
- **"SC9 initial Response to AFNOR appeal.pdf"** is a letter from Todd Carpenter to TC 46 Secretary associated to the answer above mentioned.

This document is to be read in liaison with the following documents:

- **N2232 AFNOR SUP DOCUMENTATION regarding AFNOR appeal on ISODIS26324**. This document is AFNOR supplemental documentation in order to clarify AFNOR requests, following TC 46/SC 9 Secretary proposal that *"prior to a formal appeal to TC 46 Pmembers, an effort be made among the interested parties to find some possible resolution to these issues short of the formal appeals process"* (cf. second pdf in the zip above mentioned).
- **N2233 FollowUp on AFNOR appeal against ISODIS26324**. This document refers to ISO/TC 46 Secretary explanations in order to proceed to the vote and get TC 46 members position on AFNOR appeal and define following step.

FOLLOW UP

For information regarding the Committee Internal Balloting on AFNOR appeal open until 22th January 2010

SOURCE

ISO/TC 46 Secretary
Document from ISO/TC 46/SC 9 Secretary

From: Todd Carpenter, Secretary TC 46/SC 9
To: Katel Geugen, Secretary, TC 46
Date: November 6, 2009
RE: AFNOR Appeal of ISO appeal on ISO/DIS 26324
CC: Françoise Pelle, Chair, TC 46
Sam Oh, Chair, TC 46/SC 9,
Norman Paskin, Convenor, TC 46/SC9/WG 7

Dear Mrs. Geugen,

We have received the notice you distributed last week to TC 46 members of AFNOR's desire to appeal the movement from CD to DIS 26324. I suggest that prior to a formal appeal to TC 46 P-members, an effort be made among the interested parties to find some possible resolution to these issues short of the formal appeals process. To that end, a number of the members of the working group, the convener, and I have prepared detailed documentation of the consensus process activities as a response to some of AFNOR's claims, which we hope that AFNOR will consider prior to pushing forward an appeal.

We all can appreciate the difficulty of coming to consensus on this or any other work project. However, we note in particular, quoting from the ISO/IEC Directives, Part 1, Section 2.5.6, that

“Within ISO, in case of doubt concerning consensus, approval by a two-thirds majority of the P-members of the technical committee or subcommittee voting may be deemed to be sufficient for the committee draft to be accepted for registration as an enquiry draft; however every attempt shall be made to resolve negative votes.”

A neutral review of the claims made by AFNOR in the appeal letter will highlight several factual inaccuracies at the core of several points raised. The dossier of background information provided includes documentation of the efforts at addressing the concerns of AFNOR, those of the MOU/MG group, the efforts of the Working Group to reach consensus, as well as calling out a number of substantive textual changes made to the recently released DIS, which were incorporated specifically to address AFNOR's comments on the balloted CD. It is our firm belief that based on a review of the timeline and documentation, there is a clear pattern of sincere and diligent efforts undertaken to resolve the comments from AFNOR throughout this process.

Given the fact that DIS balloting has begun, I would also ask that the response by SC 9 to the factual errors in the appeal be distributed to the P-members of TC 46. Beyond the correction of factual inaccuracies, the convener and several members of the Working Group would like to refute the claims regarding duplication of scope, and the technical rationale for the decisions that were taken in the preparation of the DIS. Given that the draft standard is out for ballot, these group members believe it important to explain their perspective about the decisions that were taken by the majority of the group so that the P-members can make informed decisions about the text at ballot. There is a feeling among

many members of the group that the distribution of the AFNOR appeal document may bias SC 9 members against the draft without an opportunity to respond to the issues by the Working Group.

We strongly encourage a dialogue be initiated examining the concerns of AFNOR. Furthermore, while it is obvious that unanimity on the text of the draft does not exist, it cannot be said that consensus does not exist or that the group has not worked diligently to accommodate the diverse views of the Working Group. At this stage, we believe it is appropriate for the P-members of SC 9 to have their opportunity to review the draft and to contribute their voices through the balloting and commenting process.

We ask that the documentation of the SC 9 response be passed onto the appropriate AFNOR representatives and to the P members of ISO/TC 46.

With kindest regards,

A handwritten signature in black ink, appearing to read 'Todd Carpenter', with a long horizontal flourish extending to the right.

Todd Carpenter
Secretary, TC 46/SC 9

From: Secretary TC 46/SC 9 and Convenor TC 46/S C9/WG 7
To: Secretary TC 46
Date: 6 November 2009
Re: Response to AFNOR appeal on ISO/DIS 26324
CC: Chair TC 46

In light of the AFNOR appeal received by TC 46, the Secretary of TC 46/SC 9 and Convenor TC 46/SC 9/WG 7 have compiled a response to the claims in that appeal. It is our firm belief that the objections outlined by AFNOR are inaccurate and should be rejected by TC 46 P-members.

Claims made in AFNOR appeal

The claims made in the appeal from AFNOR are summarised as:

1. Objections made by France on the NWIP and CD have not been taken into account.
2. Contrary to the convenor's affirmation the consensus of the working group was not reached.
3. Scope has not been adequately defined in relation to existing SC9 identifier schemes.
4. Scope must be limited to areas where no other identifier operates, in the interests of commercial implementations.
5. The consideration of resolution of an identifier is outside the scope of SC9.
6. The MOU/MG group (an ISO/IEC/ITU/UN co-ordination meeting) has a relevant resolution 7/20 which requires action.
7. International identifiers already exist for "most any" type of document; there is no need for another identifier.
8. The contents of the DIS may be detrimental to the reputation of ISO

Process for adjudication

As noted in the attached letter to this document, it is our desire to pursue a resolution short of a formal appeal. However, if that is not possible, given the amount of time between the AFNOR appeal and the next plenary meeting in Korea next May 2010, we expect that this appeal will be handled promptly via a letter ballot to ensure the broadest possible member participation in the process. We also note that AFNOR has appealed to TC46 – a body where the Chair and Secretary are AFNOR nominees or members. In the interests of reaching a fair ruling it would be expected that representatives of AFNOR, who have been engaged in the work of WG 7, recuse themselves from adjudication on this appeal, as protagonists must be excluded from managing a ruling on their own appeal.

Response

There are a number of factual inaccuracies in the claims made by AFNOR in the proposed appeal. The following documentation provides a concise response, followed by a supporting narrative of the timeline of this project, and give reference to the SC 9 N documents that provide evidence. We are also prepared, if necessary, to expose the full archive of the WG deliberations and documents, including the email archive for the discussion list used by WG7 for examination by appropriate bodies.

AFNOR presented most of the arguments contained in its September 29 appeal at various stages during the course of the Working Group's deliberations. These arguments were carefully considered by the Working Group before it decided to report out its recommendation for vote. To permit AFNOR to upset the voting process in order to provoke a fruitless re-examination of issues that have already been disposed of would completely undermine the integrity of the Working Group's processes and improperly and unnecessarily delay the submission of this valuable standard for DIS vote. AFNOR's appeal must therefore be rejected.

Response to claim 1

Objections made by AFNOR at each ballot stage are clearly shown and answered in the relevant Disposition of Comments documents as a matter of record; further these objections have also been addressed extensively and repeatedly in meetings and other documents—see Timeline below. Significant changes to various drafts have been made in response to AFNOR input, after deliberation by the WG to reach a position that fairly takes account of all views.

Response to claim 2

The balloting on ISO CD 26324 generated a great deal of comment and suggestion about improving the draft. However, there were initially only two negative votes out of 20 votes cast – excluding abstentions (See TC 46/SC 9 N489). Subsequently, one of those negative votes was changed by Canada to affirmative. See the Timeline summary below in the section “consensus” for detail on this matter.

According to the ISO Directives, Part 1, Section 2.5.6 “Within ISO, in case of doubt concerning consensus, approval by a two-thirds majority of the P-members of the technical committee or subcommittee voting may be deemed to be sufficient for the committee draft to be accepted for registration as an enquiry draft; however every attempt shall be made to resolve negative votes.” The CD Ballot having surpassed this level of approval, with all but one member (95% approval) in support of advancing the document to enquiry stage, it can reasonably be stated that consensus was achieved in the CD ballot. Furthermore, as noted above, several changes were made in an attempt to address AFNOR’s comments.

The statement made by AFNOR, must, taken at face value, call into question the integrity of the convenor in managing the WG and in reporting the results of its deliberations. Contrary to AFNOR’s assertions, the facts show that the convenor correctly and faithfully reported the Working Group’s conclusions. Again, see the Timeline summary below. To protect his reputation, the Convenor therefore reserves all rights and remedies he may have against AFNOR and its principals in any and all jurisdiction where such false assertions have been disseminated.

Response to claim 3

The issue of scope and “overlap” was dealt with from the outset of ISO work on the DOI project in 2004. The AFNOR interpretation of “overlap” ignores all the work of the WG, and this continues to be asserted despite this being pointed out many times. The position can be analogized in brief as: “My passport does not replace, substitute or compete with my Amex card, though they both have the same referent (me)”.

That multiple ISO standard identifiers can be assigned a single object cannot be disputed. In particular within the standards of TC 46/SC 9, an example is that there has long been established a system by which monograph publications issued as part of a series can be assigned both an ISBN **AND** an ISSN. The reason for this is that, despite being the same object, the object is used in different contexts by different parts of the supply chain of information. That there is overlap in uses of the same object in the distinct contexts is the reason that where serial identification is required, the ISSN is used, and in the book supply chain, the ISBN is used. There has not been, to our knowledge, any complaint lodged, any problems experienced, or any appeals from the SC 9 community generated in the several decades since this overlapping use of identifiers has been applied in this situation.

Furthermore, quoting from the *ISSN Manual* (http://www.issn.org/files/issn/Documentation/ISSN-MANUAL_JAN09.pdf) “Individual monographs, technical reports, sound and video recordings, printed music publications, audiovisual works and musical works have their own numbering systems and are not specifically mentioned in this manual. Such items may carry an ISSN in addition to their own standard numbers when they are part of a continuing resource.” This can only be interpreted as an acknowledgement of overlap of scope within SC 9 identifiers and that the community accepts this as a matter of course without calling into question the integrity of the identification systems as a whole or the value of each respective identifier.

Other examples showing the expression of SC9 identifiers within the framework of another system are the various URN schemes for SC9 identifiers (see under claim 5 below), and the long accepted use of the ISBN within ISO/IEC 15416 GS1 bar codes. Mechanisms for expression of SC9 identifiers within the DOI System, as per the DIS, have already been agreed by ISBN, ISSN and ISRC.

Scope is addressed very prominently as the very first point in the DOI DIS paragraph 1, and Annex A. The WG prepared a detailed document submitted with the DIS in June 2008, (N 489) which outlines the principles agreed as the only fair basis of dealing with any supposed "overlap". Some identifier RAs wish to collaborate with DOI; others do not. N 489 and the DIS clearly articulate how *those RAs who wish to do so may do so, and that those who do not wish to do so have no obligation to do so*. Any identifier RA which has a requirement for any functionality which DOI supplies is free to develop applications for its user community using other technologies if it wishes; and presumably will do so if the community it serves wishes this. As an illustration of DOI collaboration see the implementation of an existing TC46SC9 identifier, ISBN, used with DOI: <http://www.doi.org/factsheets/ISBN-A.html>. The general principle of working with other identifiers is clearly laid out in the documentation of the standard.

Response to claim 4

The proposal that scope be limited because of potential "competition" with Registration Authorities flies in the face of the fact that the aim of DOI is to enable interoperability.

Interoperability can be discussed at several levels - (a) syntactic, (b) semantic and (c) community or business relationships. In the DIS, (a) and (b) are provided as technical options in the DIS; discussion of (c) business relationships and commercial models is outside the scope of the standard per se. Furthermore we note that an understanding or arrangement dividing the markets for persistent identifiers would currently raise concerns under Article 81(1)(b) of the European Community Treaty and comparable provisions of the laws of EU member states, the United States and other countries. Such an arrangement should form no part of an ISO standard.

However, we point out that since the DOI System's inception in 1998, and the allocation of over 40 million DOIs, no approach has ever been planned or made by a DOI registration agency to supplant registration or services offered by existing SC9 identifiers; on the contrary, the International DOI Foundation has been vocal in its support for new SC9 identifier registries (ISNI, ISTC) since they meet different needs, and has published documentation on this point (e.g. <http://www.doi.org/factsheets/DOIIdentifiers.html>). The International DOI Foundation has offered dialogue with any existing or proposed RA that wishes to assure itself of this.

The example of ISBN is one where the case of "same referent" has been implemented – at ISBN's instigation, and as this example shows, the DOI in such cases is assigned *by the ISBN agency itself, not a competing body*, and forms an integral part of its service offering: that is, the DOI System offers a tool for adding value. If RAs of SC9 standards feel that their communities can benefit from resolution and structured metadata tools and services, they are free to introduce these to their communities (without necessarily using DOI) far easier than any potential "competitor".

Response to claim 5

Based on the experience of many SC 9 identification systems, the proposition that the review of resolution of an identifier is outside the scope and competence of SC9 does not accord with actual work being done by SC 9 registration authorities. Several existing SC9 identifiers have long had resolution schemes associated with them. All digital networks use resolution. The DOI option of using an existing identifier in the framework of another scheme is essentially the same model as the use of existing SC9 identifier registries with resolution mechanisms such as URN: ISSN (IETF RFC 3044); ISBN (RFC 3187); and ISAN (RFC 4246). These do not preclude other uses in URIs, nor do they "compete" with the existing SC9 scheme: they are merely ways of expressing for a particular internet application. In response to the agreed changes noted at CD stage, details of the DOI resolution mechanism are now omitted from the DIS, allowing any resolution technology to be used in implementation.

The inclusion of the word System in the title of the Standard does not imply that this standard could fall under the scope of TC 46 / SC 4. The word "identifier" alone is often ambiguous (it may be used to refer to syntax, specification, infrastructure or implementation). Section 3 "Terms and definitions" describes how the word System is used to minimise ambiguity and refer to the component functions of the DOI scheme.

It is obvious that there is a market requirement for resolvable and persistent identifiers, to overcome the problems associated with reference as URLs, and the DOI has proven itself as a useful tool for doing so.

Response to claim 6

This claim is erroneous because AFNOR fails to note that the MOU/MG resolution 7/20 has been withdrawn.

Incorrect information was disseminated at the 19th MoU/MG meeting, without TC46/SC9 being consulted, informed that the discussion was taking place, or offered an opportunity to respond (contrary to article 4 of MoU/MG's own Operating Procedures): resolution 7/20 resulted. This was subsequently corrected at the 20th meeting, where a presentation on DOI was made by the WG7 convenor; it was agreed at the 21st meeting that Resolution 7/20 was inappropriate and it was cancelled. Parties with an interest or concerns were invited to review the DOI materials.

DOI has already been discussed extensively with ISO/IEC JTC1 and other bodies including ITU and GS1. The Chair of MoU/MG has confirmed (in an email from Oct 8 2009) in response to seeing the AFNOR appeal that the MOU/MG "consider [the issue] closed from the MoU/MG standpoint". Further, the MoU/MG Operating Procedures, Annex B of MoU/MG document 46, state that "the MoU/MG shall not represent an additional layer of bureaucracy in the standardization process" and that "each organization retains its own decision making process". (http://isotc.iso.org/livelink/livelink/fetch/2000/2489/Ittf_Home/MoU-MG/MoumgDocs.html)

Response to claim 7

Of the 40 million DOI names assigned to date, the vast majority are to entities where no existing ISO SC9 scheme applies. This refutes the proposition that that "international identifiers already exist for most any type of documents". The proposals for additional identifiers within SC9 such as ISNI, ISTC, etc also refute this proposition. The NWIP was introduced with majority support, which further refutes the proposition.

The purpose of an identifier registry is to manage a given collection of identifiers; the primary purpose of the DOI System, on the other hand, is to make a collection of identifiers actionable and interoperable, where that collection can include identifiers from many other controlled collections, with selected coverage, flexible scope and extensible granularity (<http://www.doi.org/factsheets/DOIIdentifiers.html>.)

Response to claim 8

The claim that the contents of the DIS may be detrimental to the reputation of ISO is rejected, and entirely unsupported by evidence.

Timeline

Origin TC46/SC9 invited the DOI Foundation (IDF) to consider submitting the DOI (already an existing system, and a U.S. National syntax specification standard ANSI/NISO Z39.84-2000) for ISO standardisation in October 2004. The International ISBN Agency had been one of the initial partners in the development of the DOI System and was instrumental in making this connection. IDF were aware of the difference in scope and coverage of the DOI System compared to other SC9 identifiers, but also its potential relevance, and specifically noted this. The presentation made at the 28 October 2004 TC46 meeting in Washington addressed this: slides 2,5,10,11,12,13 (fully 45% of the presentation 041028ISOTC46DOI.ppt) explicitly draw attention to this point and explain it in detail; the topic was also discussed in the following Q&A. Following this SC9 then voted at the October 2004 meeting to accept DOI for further development as a new work item.

Input Working Draft The SC9 secretariat worked with the International DOI Foundation in late 2005 to produce an initial working draft which was discussed at the SC9 meeting in Chang Mai Feb 2006 (where again issues of scope and resolution were extensively discussed): it was agreed to submit this as a new work item proposal.

NWIP Voting on the New Work Item Proposal (working draft) ended on July 20, 2006. There was one negative vote (AFNOR): their objection was similar to the current appeal and ignored the comments on this point made in the earlier discussions. The NWIP was approved for acceptance into committee and a WG formed. The WG (operating by web conference, teleconference, e-mail reflector and physical meetings) met from Sept 21 2006 onwards. Thirteen versions of a draft were produced in succession by this WG. Scope and relation to other identifier schemes were key issues discussed at each meeting. At the WG meeting held in London on 5 Dec 2007 a CD and Disposition of WD comments were approved to go forward; the Disposition of Comments on the WD included a section on "*Common issues. This section provides answers to a number of questions and issues common to several of the national body comments, or which have been discussed during the WG meetings. The WG feels it would be helpful to have these available for consideration with the final draft of the standard.*" Once again, these documents addressed issues of scope.

CD Voting on the CD (25 Jan – 25 April 2008) produced two negative votes (France and Canada), on very different grounds. Canada commented: "If the changes proposed in our technical comments are accepted, Canada will change its vote to positive". This suggestion of Canada to simplify the standard (by omitting implementation technology) was discussed at the Stockholm SC9 meeting (May 2008) and accepted unanimously. The France objection was again similar to the current appeal.

Preparation of DIS In June 2008 the WG agreed a revised DIS version for submission to the ISO CS for review. Because scope and relation to other identifiers issues had yet again been raised, the WG spent most of its time on this issue and prepared an agreed detailed document submitted with the DIS in June 2008, setting out the principles which the WG had agreed in arriving at its consensus [*WG7 Convenor's Report on the Disposition of Comments (DoC) on the CD*] with in particular section "G3. DOI system in relation to other identifiers for content entities" (N489)]. After delayed review by ISO CS, this was converted to a DIS submission (responding to editorial changes received from ISO/CS in March 2009) by the WG in April 2009. Approval was sought on the final wording from the WG by a deadline and *no changes were requested* (see detailed discussion of this point under "Consensus" below).

The DIS proposal was discussed at the SC9 meeting in Nairobi (May 2009) where in the absence of the convenor, or even a majority of the WG members, allegations similar to the current appeal were made, and rejected by some members of the WG who were present. Those allegations were subsequently rebutted by the convenor, with documentary evidence, in a clarification to SC9 secretariat and the ISO CS (10 June 2009). At Nairobi the report N489 presenting the principles agreed on issues on scope and relation to other schemes appears to have been ignored. The Nairobi meeting produced a Resolution 4: "*SC 9 instructs the convenor of WG 7 to consult with the Working Group to review the final editorial changes made by ISO Central Secretariat*". On receipt of this, the convenor obtained confirmation from the SC9 secretariat and ISO CS that the remit of the resolution was as stated, and not to revisit the already agreed consensus - no new material had been brought forward. The convenor prepared a draft including the required changes (consequently maintaining the principles already agreed on scope and relationship to other identifiers); approval was sought from the WG by a deadline and no changes were proposed (see detailed discussion of this point under "Consensus" below). The DIS was forwarded to ISO/CS for processing. Finally, as a more discursive background document intended to further clarify any remaining questions, the International DOI Foundation produced a factsheet on the issue of scope in relation to other identifier schemes (<http://www.doi.org/factsheets/DOIIdentifiers.html>): this was sent to the Registration Authority representatives of all the other ISO TC46 SC9 identifier schemes, with an invitation to contribute any revisions, corrections or changes: none has been received.

DIS balloting. The DIS ballot has been opened, and closes on 05 March 2010. We consider that the time and place to make any objections is as part of the balloting phase. However we would hope that AFNOR avoid raising objections that have already been dealt with exhaustively and repeatedly in the period 2004-2009.

Consensus. The voting report with the committee's response to the earlier CD comments was distributed to the SC9 membership on August 25th, 2008 (document SC9 N489). In particular the document "*WG7 Convenor's Report on the Disposition of Comments (DoC) on the CD*" (080627_DoC_WG_CD26324_DOI) circulated as part of N489 contains discussion in sections G3 of DOI system in relation to other identifiers for content entities. *As this*

document is key to this issue, we attach a further copy for convenience. That wording was agreed by the WG: no claims to the contrary have been made. The CD and DIS reflected this consensus on scope and relation to other identifiers reached in 2008. A revised draft including responses to the CD comments was submitted to the SC9 secretariat on 27 June 2008.

On 11 March 2009, the convenor posted to the WG list a draft of comments in response to receipt of the ISO Technical Editor's review on the draft. Quoting from that message: "I [i.e., the convener] propose to draft a new version [of the DIS] incorporating the required considerations or a response, and aim to circulate that to the WG in the next two weeks if possible. Please let me have before then your constructive comments on the issues marked." No objections were received, so this was accepted and again confirmed to the list on April 2 2009, with a further opportunity for final objections. Once again, no objections were received. No clearer demonstration of consensus can be provided than a complete lack of stated objections. Twice, a request for comments was sent to the group; in each case, all WG members saw messages on the list from those who did comment, and had only to submit a simple comment if they felt their views were not clear. It is not acceptable for WG members to claim that their response has not been considered when no response has been made.

At the Kenya meeting it was falsely stated that no such deadline had been provided to the group and that some objections had not been considered. The promulgators of this view have since been asked several times on the WG list why no comments had been made in the March/April call and why this false claim was made. We have received no response from them.

Following the Nairobi resolution (above) the changes proposed in response (minor, being mainly editorial in nature at the behest of ISO/CS) were circulated to the list for approval on 15 July 2009. A deadline for responses of 31 July was given. The only response from the current objectors was to ask for more time to re-open the discussion on scope. After exchanges on the list, where a majority of comments strongly objected to this, the convenor summarised the position and sent the DIS and documents to the secretariat after an extended deadline on 7 August. The rationale for this decision by the convenor, taken after consultation with the SC9 secretariat, was based on:

- the inaccurate representation of the March/April events noted above;
- changes to be considered were restricted to responses to the CS edits;
- no new matters of substance had been presented;
- the WG had already been in existence for three years to consider and sustain any objections;
- the majority of WG comments were that consensus had been reached despite minority claims to the contrary, and the matter should now go to ballot;
- scope had already been fully dealt with in the CD;
- TC46 had voted in overwhelming majority (95% excluding abstentions) at CD stage for the DOI work to proceed based on this scope and the principles in N489;
- many WG members viewed this request as a time wasting manoeuvre;
- further exchanges on the list did not offer any new material relevant to the issue but merely sought to re-open consideration of the existing consensus.

The discussion now seems to be whether we have consensus that there was a consensus. We strongly affirm that there was consensus; but if objectors still maintain that this is not the case then after three years of WG activity this must be viewed as an unresolvable disagreement, to be resolved by the draft going forward for ballot - as is the current course of action