

**Final Report
Customer Standing Committee
Effectiveness Review**

Prepared by the Customer Standing Committee Effectiveness Review Team
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Executive Summary

The Customer Standing Committee (“CSC”) was established on 1 October 2016 and was an important element of the package of recommendations supported by the US Government as part of the IANA Transition process. The CSC performs the operational oversight, and monitors the performance of, the Internet Assigned Names Authority (“IANA”) naming functions and its mission is to ensure the continued satisfactory performance of the IANA functions for the direct customers of the naming services. The role the CSC performs is very important and cannot be overstated.

In accordance with Section 17 of the ICANN Bylaws and the CSC Charter, the effectiveness of the CSC is to be reviewed two years after its first meeting, and then every three years, using a method determined by the ccNSO and GNSO. In September 2018, the ccNSO and GNSO Councils adopted a Template to conduct the first Effectiveness Review. In August 2021, the ccNSO and GNSO Councils adopted the Terms of Reference for the second CSC Effectiveness Review, using the same template as the first review supplemented with a question on whether the recommendations of the first review had been implemented and were effective. Both the ccNSO and GNSO Council appointed two representatives of their respective SOs to conduct the review (hereafter referred to as the Team).

Consistent with the findings of the first CSC Effectiveness Review, the Team found that the CSC is operating effectively and in accordance with the CSC Charter. In addition, the CSC continues to have an excellent working relationship with PTI. The Team assessed the effectiveness of the CSC against fourteen (14) metrics and concluded that eight (8) were achieved, three (3) were not applicable, and three (3) were not achieved. With respect to the implementation of the recommendations of the first review, the Team concluded three (3) of the four (4) recommendations were fully implemented, and one (1), was not. The Team believes that the metrics that were not achieved can be easily remedied and, accordingly, have recommended actions to be taken by the CSC to address the issues.

The Team agrees with the conclusion of the first review that much of the CSC’s effectiveness is primarily related to the caliber and dedication of the CSC members and liaisons. Even though the current CSC team had not had the opportunity to meet in person due to COVID, it is evident to the Team that the CSC works well together and is well-guided in performing its duties. During the review the Team identified several issues that may impact the effectiveness of the CSC in the longer term. For example, the work of the CSC has become routine and there is a concern that this may be to the detriment of the CSC being able to find suitably qualified volunteers in the future. In addition, the requirement for geographic diversity in team composition and associated time zone challenges, can mean that quorum is not met and decisions are deferred. The Team has made recommendations to address these issues to ensure the CSC remains effective in the performance of their role in the longer term.

1. Introduction

The Customer Standing Committee (“CSC”) was established as one of the post IANA Transition entities, and conducted its first meeting on 6 October 2016. The CSC performs the operational oversight, which was previously performed by the U.S. Department of Commerce’s National Telecommunications and Information Administration, related to the monitoring of the performance of the IANA naming functions, which are currently performed by Public Technical Identifiers (PTI) under contract with ICANN. The CSC’s mission is to ensure the continued satisfactory performance of the IANA naming function for the direct customers of the naming services.

According to the CSC Charter (Included as Annex D) and Section 17.3(b) of the ICANN Bylaws:

(b) The effectiveness of the CSC shall be reviewed two years after the first meeting of the CSC; and then every three years thereafter. The method of review will be determined by the ccNSO and GNSO and the findings of the review will be published on the Website.

In August 2021, the ccNSO and GNSO Councils adopted the Terms of Reference for the second CSC Effectiveness Review (included as Annex C). The Councils agreed that the most practical and efficient path forward was for the ccNSO and GNSO to:

1. Follow the same methodology used for the first CSC effectiveness review;¹ and
2. Appoint two members each to conduct the CSC Effectiveness Review.

In September 2021, Donna Austin, Jonathan Robinson, Maarten Simon, and Jens Petur Jensen (the “Team”) were appointed by the GNSO and ccNSO, respectively to conduct the CSC Effectiveness Review. In January 2022, Jens Petur Jensen was replaced by Sean Copeland.

In addition, the CSC appointed Brett Carr as a liaison to the Team, and ICANN org provided staff support. Additional expert advisors from both PTI and ICANN org assisted the Team by providing necessary factual background and information. The list of members, liaisons, and expert advisors and support staff is included as Annex E. The Team had an email list and wiki space, which can be found here: <https://community.icann.org/display/ER>.

While conducting the review, the Team identified additional topics for consideration and discussion.

¹ The first review was considered by all interested parties to be successful in terms of methodology, duration, and results. In addition, using the same methodology would allow for a longitudinal comparison of the effectiveness of the CSC.

2. Purpose, Scope, and Method of the Review

Purpose of the Review

The Team is tasked with considering the effectiveness of the CSC in carrying out its mission as defined in the CSC Charter.

Scope of the Review

While the scope of the review was initially restricted to measuring the effectiveness of the CSC against requirements in the CSC Charter, using the method developed by the Review Team that conducted the first review. The Team also agreed to assess whether the recommendations from the first CSC Effectiveness Review had been implemented. Finally, the Team added seven (7) additional topics for consideration, which are directly related to the future effectiveness of the CSC. These additional topics were added due to the conversations with the CSC, PTI and PTI Board.

Out of Scope of the Review

According to the Template if, in the course of its review, the Team identifies issues that are considered out of the scope of the CSC Effectiveness Review, but could be relevant for the proper functioning of the CSC, the Team is expected to inform the ccNSO and GNSO Councils.

The Team discussed the fact that the CSC is only responsible for monitoring IANA's performance as it relates to the naming functions and that IANA has other similar structures in place for the numbering functions and protocol parameter functions. For the numbering functions IANA is accountable to the Regional Internet Registries (RIRs) who establish an annual review committee to review IANA's performance for the previous year. For the protocol parameter functions primarily provided for the IETF community, there is an IETF IANA Leadership Group that meets regularly and is also responsible for reviewing IANA's performance.

While the Team recognizes these are three (3) distinct areas of responsibility for IANA, the Team is of the view that given the importance of the IANA function, particularly post IANA-transition, it would be beneficial for the CSC and their counterparts monitoring IANA's performance for the numbering and protocol parameters to meet on an annual basis to discuss their respective roles and provide an opportunity to discuss any concerns or issues that may have come to light during the year.

The Team believes this suggestion is beyond the remit of CSC Effectiveness Review, and therefore recommends that the ccNSO and GNSO Councils in consultation with the PTI Board discuss the merits of this suggestion and pursue accordingly.

Method of Review

The CSC Charter, or other potentially relevant documentation, does not specify how to measure the CSC’s “effectiveness”. However, the CSC Charter does define the CSC’s mission; how the CSC should conduct its work, places requirements on the membership of the CSC and sets requirements for reporting to the community.

The first review team developed a structured approach (method) to assess the effectiveness of the CSC based on an analysis of the Charter. Through this process, the first review team identified performance indicators and related metrics from the CSC charter that served as a basis to assess the CSC’s effectiveness. These indicators and metrics reflect both the CSC’s mission and the scope of its responsibilities; the first review team examined the work of the CSC based on how these requirements for oversight and reporting had been achieved. Using this outcome-based assessment, the first review team developed an objective, verifiable, and lightweight method to review the effectiveness of the CSC; in creating this template, the first review team also recommended that future effectiveness review teams use the same template. Accordingly, the Team agreed to conduct its work using the same template.

To inform its assessment of the CSC’s effectiveness, the Team met with representatives from the CSC, PTI, and ICANN org, and reviewed documentation available on the CSC website, the Final Report of the CSC Charter Review, the first CSC Effectiveness Review, and the first IANA Naming Function Review. The notes from these consultations, the meetings and the template used by the Team are available on the Team’s wiki:

<https://community.icann.org/display/CTeam>.

The Team is publishing its Initial Report for public comment to seek feedback and input from the broader community. Following the public comment period, the Team will publish the summary of public comments, and the summary will be included in Team’s Final Report, which will be submitted to both the ccNSO and GNSO Councils for their consideration.

3. Summary of Effectiveness Team Findings

The summary of the results of the review is presented in the following tables:

- Table 1: Overview of Metrics 2nd Effectiveness Review.
- Table 2: Overview of observations of Team on additional topics

The full findings and observations of the Team with respect to all items in Table 1 below are presented in detail in Annex A, Detailed Findings CSC effectiveness.

In addition, and to present the evolution of the effectiveness of CSC, the results of the first and second reviews are included in Annex B, Comparison Outcome 2nd and 1st review

Table 1: Overview of Metrics 2nd Effectiveness Review

	Metric	2nd Review Outcome
1.	CSC monitors the performance of the IANA naming function against agreed service level targets regularly	Achieved
2.	CSC analyzes monthly reports provided by PTI and publishes their findings	Achieved
3.	CSC follows up where required on any performance issues identified and agrees on a plan for resolution with PTI and ICANN	Achieved
4.	Where appropriate, the CSC requests a review or change of a service level agreement.	Achieved
5.	Where appropriate, the CSC undertakes remedial action to address poor performance in accordance with the Remedial Action Procedures	N/A
6.	When appropriate, if remedial action by the CSC has not resolved the poor performance, CSC is authorized to escalate the performance issues to the ccNSO and GNSO for consideration	N/A
7.	CSC has an effective process for tracking complaints escalated to PTI Management (Escalations), and CSC Members can be directly informed of individual complaints by email.	Achieved (For future to be reconsidered in context of frequency of meetings)
8.	CSC will conduct, at least annually, a consultation with PTI and ICANN, the primary customers of the naming services, and the ICANN community regarding the performance of PTI	Not achieved (impact of pandemic)
9.	CSC, in consultation with the registry operators, is authorized to discuss with ICANN and PTI ways to enhance the provision of IANA's operational services	Achieved
10.	Where ICANN and PTI have been responsible for implementing recommended changes to operational services or the Service Level Agreements, the CSC is confident that has been completed appropriately	Achieved
11.	CSC is providing a liaison to the IANA Functions Review Team	Achieved
12.	CSC is providing a liaison to a Separation Cross Community Working Group	N/A
13.	Meeting attendance of CSC Members	Not achieved, discuss appointment of alternates
14.	Meeting attendance of CSC liaisons excluding PTI Liaison	Not achieved, discuss appointment of alternates
15.	Implementation of the four 1 st Effectiveness Review Recommendations	Recommendation 1: Achieved/Fully Implemented Recommendation 2: Not Achieved/ Not fully implemented Recommendation 3: Achieved/Fully Implemented Recommendation 4: Achieved/Fully Implemented

4. Conclusions Effectiveness CSC and Recommendations

Based on its assessment, the Team has concluded that the CSC is operating effectively. Of the 14 metrics identified for the first Effectiveness Review, the Team concluded that eight (8) were achieved, three (3) were not applicable, and three (3) were not achieved.

With respect to the implementation of the recommendations of the first review, the Team concluded three (3) of the recommendations were fully implemented, and one (1), was not.

The Team found that the CSC did not achieve Metric 13, 14, and 15.2. These metrics deal with meeting attendance of the CSC members and liaisons excluding the PTI Liaison.

The Team believes that the CSC's continuing high level of effectiveness is primarily due to the commitment, knowledge, and expertise of the people appointed to the CSC.

Looking ahead, the Team is concerned that the effectiveness of the CSC could be compromised if members and liaisons do not attend meetings regularly. To address this, the Team again recommends that the CSC regularly informs the relevant appointing organizations about the meeting attendance of their appointed members and liaisons. In addition, the appointing organizations are advised to check whether their appointees attend meetings. When a member or liaison of the CSC is not meeting the minimum attendance requirements, the Chair of the CSC should formally and promptly notify the appointing organization.

In addition, and as recommended by the first Team, appointing organizations are urged to consider and communicate their expectations of appointees, both in terms of active participation in the CSC and reporting requirements. Appointing organizations are expected to use the means provided in the charter to ensure their expectations will be met.

5. Additional topics with potential impact effectiveness CSC

During its work and interviews the Team identified additional issues that may impact the effectiveness of the CSC in the longer term. They were not included in the original metrics and, in the view of the Team, should not be treated as metrics to assess the effectiveness. However, the Team believes that these issues need to be logged and solved at one point to ensure the CSC remains effective.

1. Chair & Vice-chair Election. Should the Chair be a member of the CSC?

The issue. According to the 2018 CSC Charter (Annex C): *“The Chair of the CSC will be elected on an annual basis by the CSC. **Ideally** (emphasis added) the Chair will be a direct customer of the IANA naming function, and cannot be the IANA Functions Operator Liaison.”* This is also reflected in the CSC internal procedure for the election of Chair and Vice-Chair (<https://www.icann.org/en/system/files/files/csc-appointment-procedure-04nov19-en.pdf>).

The Chair of the CSC at the time of this review , was Lars-Johan Liman, a Liaison appointed by the RSSAC to the inaugural CSC. While the Charter notes that, ideally, the Chair will be a direct customer of the IANA Naming Function, Lars was considered the best candidate in 2019 to become Chair because of his expertise and knowledge of the CSC’s roles and processes, as well as the continued stable functioning of the CSC. Lars was appointed to the CSC in October 2016, and the CSC members at the time of Lars’s appointment had considerably less CSC experience.

Finding. The Team notes that the limited number of CSC members and the length of their tenure may at times require the CSC to be flexible regarding their appointments. The Team agreed that the language in the Charter provides the CSC with the necessary flexibility to appoint the most appropriate Chair for the situation. In addition, the fact that the Chair does not represent a direct customer has not been detrimental to the functioning of the CSC in the performance of its role.

Recommendation. The team believes that the current arrangement to appoint the CSC Chair works well and the Charter does not need to be adjusted.

2. Frequency of meetings in light of the workload: is monthly meeting CSC still required?

The issue. The Charter requires that the CSC “ ... meet at least once every month via teleconference...”. This was to reflect the envisioned important role the CSC would perform and the possibility that the CSC could escalate PTI performance issues that could ultimately trigger a review of IANA. However, in discussions with the CSC, the Team was informed that most meetings are completed in 20-30 minutes as the work has become routine and is rarely controversial.

In addition, due to the geographic distribution of the CSC membership, attendance levels have dropped despite the introduction of rotating meeting times. The Team therefore considered whether the current meeting requirement is needed?

Findings. The CSC meetings generally have the same items on the agenda (Monthly Reports) that do not require substantive discussion. However, regular meetings were considered important to maintaining a good working relationship among the CSC as well as with the PTI. The CSC suggested that meetings should be held at least once every two-months. It was noted that although the work of the CSC was not directly affected by the pandemic, the potential cohesion of the group was at risk because some of the people on the CSC had never met in person. While the Team recognizes that this is the case not just for the CSC, but for a number of ICANN community groups, the cohesion of the CSC is considered very important given the role they undertake

Recommendation. The Team recommends that the CSC keeps the regular cadence of its meetings. It is acknowledged there is an issue with attendance. However, reducing the number of meetings would not resolve the issue in the Team's view.

The Team recommends that the CSC maintains flexibility in the timing of its meetings to optimize attendance. In addition, the appointing organizations (particularly the RySG and ccNSO) are strongly encouraged to appoint one (1) alternate, who could perform the role of a member or liaison, when a member or liaison is not able to attend a scheduled meeting (see also section 5.6 below) .

3. Attracting new volunteers: will the CSC keep attracting capable volunteers?

The issue. The first Review team noted that the effectiveness and success of the CSC is, to a great extent, due to the quality, expertise and commitment of the membership of the CSC. The Team concurs that this is also true for the current CSC. However, the Team also notes that since the first effectiveness review was concluded, the interest in the work of the CSC seems to be diminishing. One of the organizations that initially appointed a liaison declined to continue to do so after the first term. In their view, the work of the CSC is of lesser priority and they cannot find candidates committed to participating regularly. The Team also observes a decreasing level of interest during the annual call for nominations. One of the members of the Team noted that although the work looks interesting, the description of qualifications may be a barrier to attracting candidates and should be reviewed. The Team was made aware that each appointing organisation is responsible for developing their respective selection criteria and processes and that perhaps it might be timely for the appointing organisations to review their respective processes to assess whether it continues to be fit-for-purpose.

Findings. Whether the CSC will be able to keep attracting capable volunteers is a concern for the future effectiveness of the CSC.

Recommendation.

The Team believes that appointing one alternate to the CSC by each appointing organisation, will increase the pool of capable volunteers that could be appointed as a member to the CSC in the future. It is intended that the alternates will be allowed to attend CSC meetings and have access to the mailing list in order to be able to participate in the absence of an appointed member as required..

The Team also recommends that the appointing organisations review their expression of interest process to assess whether it continues to be fit for purpose and is not in any way a barrier to engaging potential volunteers.

Recommendations 3 should be read in conjunction with recommendation 6 as both Recommendations suggest that each of the appointing organisations appoint an alternate.

4. Limited role of the CSC: Is the scope of activities still beneficial to the effectiveness of the CSC?

The issue. In conversations with the CSC, PTI and PTI Board, the question of whether the CSC should take on a broader role was discussed.

The CSC's role is limited to: *"monitor PTI IANA Naming Function performance for the benefit and on behalf of the direct customers of the IANA Naming Function Services"*. The role of the CSC was the subject of considerable discussion by the CCWG IANA Transition. Given the important role the CSC was to undertake the CCWG agreed that the role should be limited and narrowly scoped.

Now that the CSC has been operating for five years and their processes are well-established there is concern that the CSC's limited scope may be detrimental in the future to attracting volunteers as the work has become routine.

Findings. As part of its review the Team considered the scope of work of the CSC as recorded in its charter. After extensive conversations with the CSC, PTI and PTI Board the Team is of the view that the scope of work of the CSC should not be expanded at this time. As already concluded by the first CSC effectiveness review team, and re-iterated in the discussions by the CSC, the PTI and PTI Board, the limited role of the CSC is a strength and broadening its scope of activities could put the focused approach at risk.

Recommendation. The Team recommends not expanding the limited role of the CSC at this time.

5. Should the PTI SLAs be reviewed periodically?

The issue. In its conversations with the CSC, PTI and PTI Board, the question whether the IANA Naming Function SLAs should be reviewed periodically was a recurring theme. Specifically, whether there is an expectation that the SLAs would be reviewed periodically, and if so, should this be done as part of an IANA Function Review or alternatively whether this could be done by the CSC under its current mandate?

The current SLAs were developed as part of the IANA Stewardship Transition Process and are reflected in the 2016 IANA Naming Function Contract. Given the passage of time, the Team was advised by both PTI and the PTI Board that it would be timely to assess the adequacy of the current SLAs by way of a review and that the CSC is considered well placed to conduct such a review, in consultation with the broader ICANN community.

Findings. The Team notes that as part of the IANA Naming Function Contract the CSC and PTI each have specific roles in amending individual SLAs as reflected in the CSC- PTI Process for Amending the IANA Naming Service Level Agreements. ([Process for Amending the IANA Naming Service Level Agreements](#))

The Team also notes that according to section 18.3 under the ICANN Bylaw, the IANA Function Review (Team) is mandated to review PTI’s Statement of Work under the IANA Naming Function Contract and its performance against the established SLAs². However, the review of the SLAs is not included in section 18.3 and , the first IANA Naming Function Review Team (IFRT) noted³ that the CSC reviewed specific, individual SLAs as expected and mandated under the IANA Naming Function Contract. The first IFRT did not review the SLAs.

The Team generally supports the view that a regular review of the SLAs (whatever regular means) would be appropriate to ensure that the SLAs remain current and relevant. Issues may emerge over time that require attention and a regular review of the coherent set of SLAs will help avoid longer-term problems that may emerge and maintain support and trust in structure resulting from the IANA Stewardship transition.

In addition, it was also noted that there is a gap between the performance of PTI that is measured through SLAs and the results of the Customer survey ([IANA Engagement Survey 2021](#)). A regular review of the SLAs could assist in addressing this gap.

The Team understands that the SLA review would be generic and undertaken regularly - however regular will be defined. The goal of the review is to ensure the SLAs remain adequate and relevant for the direct customers. When the Process for amending the IANA Naming Service Level Agreements was developed consideration was not given to conducting a more general and regular review of the SLAs.

During the conversations on this topic between the Team, the CSC and the PTI, it was stated that by its very nature, a general review of the SLA will have broader ramifications than just reviewing or adding individual SLAs for which the current Process was designed.

Recommendation: The Team recommends that the CSC in close cooperation with PTI develop a framework that could be used to conduct regular reviews of the SLAs. The starting point for such a framework could be based on the [Process for Amending the IANA Naming](#)

² Article 18.3 (f) of the ICANN Bylaws.

³ See section 5.3 of the IF Team Final Report ((Final Report 2021: [Review Team Written Documents: \(ex. Final Report\) - Confluence](#) , page 14 – 43), which list observations of the IFRT with respect to role of the CSC as anticipated under the IANA Naming Function Contract, specifically with respect to role of the CSC regarding changes of the Statement of Work and SLAs.

[Service Level Agreements](#). The framework will require the support of the direct customers of PTI.

6. Need to appoint Alternates for Members and/or Liaisons of the CSC?

The issue. The CSC raised concerns that the quorum requirement that all four (4) members of the CSC need to be present for a meeting means that decisions cannot be taken if all four members are not present and have to be deferred to an on-line decision. This is particularly difficult when also trying to accommodate the geographic diversity of the full membership. To share the burden of the time zone differences, the CSC membership agreed to rotate the timing of the calls i.e shifting the start 8 hours every other meeting.

The CSC suggested that the appointment of alternates could be a solution to reduce risk of non-quorate meetings. The alternate(s) would be allowed to substitute for a member who is unable to attend and would be counted as a member for quorum purposes. The CSC also suggested that appointing alternates could help attract future volunteers who may be interested in the work of the CSC.

The CSC proposed that the CSC liaison appointing organizations be also encouraged to appoint alternates. The alternates can attend a CSC meeting as an observer and ensure this way that the appointing organization is kept informed. In addition, alternates could contribute to attracting additional volunteers who have an interest in the work of the CSC and with the adequate profile.

Findings. As stated in section 4 above the Team noted that the level of attendance by the members does not meet the required level. The Team also notes that as a result of low attendance the CSC at times has had to defer its decision-making. The Team concurs with the CSC that the high bar for attendance together with the rotating call times, contributes to this situation.

The Team also noted that the level of attendance of the Liaisons does not meet the required level and the CSC has not been informing the appointing organisations as required. A possible consequence being that these organizations may not be informed about what's discussed by the CSC with respect to the IANA Naming Function and performance of the PTI.

Recommendation. The Team strongly encourages the ccNSO and RySG to each appoint one (1) alternate to the CSC. The Team also advises that the liaison appointing organizations each appoint one (1) alternate. The primary purpose of the alternative is to act as a substitute for an appointed member as required as a means to meet the quorum requirement. The appointed alternates should have the same access to information as the appointed members and liaisons, including - but not limited to - subscription to the CSC email list.

The CSC recommends that this will be resolved procedurally by the CSC, in consultation with the appointing organizations and not through a Charter amendment.

The CSC will be responsible for determining the role of the alternate and developing the procedure for appointment, in consultation with the appointing organizations.

Recommendations 6 should be read in conjunction with Recommendation 3 as both Recommendations suggest that each of the appointing organisations appoint an alternate.

7. (New-) Frequency of CSC Effectiveness Review

According to the CSC Charter and Section 17.3 (b) of the Bylaws, “The effectiveness of the CSC shall be reviewed two years after the first meeting of the CSC; and then every three years thereafter. The method of review will be determined by the ccNSO and GNSO and the findings of the review will be published on the Website.”

The Team has been made aware that the IANA Function Review is scheduled to start by September 2023. This review overlaps with 1. part of the work of the CSC and 2. The CSC Effectiveness review.

After concluding the second Review, the Team notes that both this and the first review found the CSC to be effective and acting in accordance with its charter and that the CSC continues to have an excellent working relationship with PTI. Also in line with the first review the second review team found that effectiveness is primarily related to the caliber and dedication of the CSC members and liaisons.

Although the role the CSC performs is very important and cannot be overstated and therefore its continued effectiveness needs to be ensured, the Team encourages the ccNSO and GNSO Councils to consider whether the prescribed frequency of the CSC Effectiveness Review remains appropriate. The Team is of the view that the Effectiveness Review could be reduced to a frequency of once every five years after the previous review was concluded without any adverse impact on the CSC or PTI.

Annex A — Findings basic metrics of 2nd CSC Team

	Metric	2 nd Review Assessment	Findings	2nd Review Outcome
1.	CSC monitors the performance of the IANA naming function against agreed service level targets on a regular basis	PTI sends the performance report to all CSC Members monthly. The CSC produces a monthly Findings report. The previous reports can be found at: https://www.icann.org/csc under the heading “Reports & Findings”. The PTI report includes references to all SLAs as listed under the IANA Naming Function Contract.	Detailed monthly PTI reports and CSC findings are available. I have noticed that one PTI report is missing (July 2020) and that a few that were missing have been posted last September. Further noticed that on January 20, 2022 the newest report is August 2022 and Findings July 2022.	Achieved
2.	CSC analyses monthly reports provided by PTI and publishes their findings			
3.	CSC follows up where required on any performance issues identified and agrees on a plan for resolution with PTI and ICANN	The CSC discusses and follows-up if an SLA is not met and reports the result in the Findings report, see for example: PTI performance Report December 2020 (https://www.icann.org/iana_csc_docs/519-csc-findings-of-pti-performance-december-2020-v-1) and follow-up discussion pertaining to the SLA that was missed (CSC agenda and discussion February & March 2021 (see for example: https://www.icann.org/uploads/iana_work_session_asset/attachment/1029/1631302896622Agenda_and_Notes_CSC_Meeting_47-17_February_2021.pdf))	Validated	Achieved
4.	Where appropriate, the CSC requests a review or change of a service level agreement.	The CSC is mandated to discuss the provisioning of IANA Naming Services through the process for amending the IANA Naming Service Level Agreements (https://www.icann.org/en/system/files/files/iana-naming-function-sla-amendment-process-28mar19-en.pdf). After the process became effective, 3 Service Level Agreements have been changed/introduced: <ul style="list-style-type: none"> - Technical checks - Processing IDN Table (new SLA) - ccTLD delegation/transfer (amendment) <p>Additionally the CSC together with PTI explored the need to change an SLA in February and March 2021 (see above item # 3).</p>	Validated	Achieved

	Metric	2 nd Review Assessment	Findings	2 nd Review Outcome
5.	Where appropriate the CSC undertakes remedial action to address poor performance in accordance with the Remedial Action Procedures	The CSC is aware it is required to do this, but, so far, in my time in the CSC, this has never been required. No remedial action to date has been required The Procedure itself can be found at: https://www.icann.org/en/system/files/files/csc-remedial-action-procedures-19feb19-en.pdf	Validated	N/A
6.	When appropriate remedial action by the CSC has not resolved the poor performance, CSC is authorised to escalate the performance issues to the ccNSO and GNSO for consideration	To date, the Remedial Action Procedure has not been invoked.	Validated	N/A
7.	CSC has an effective process for tracking complaints that have been escalated to PTI Management (Escalations), and CSC Members can be directly informed of individual complaints by email.	The CSC is informed by PTI if they have received complaints and, if so, how it was handled. This is reported in CSC Findings of PTI Performance (see the monthly Findings Reports). According to its Charter the CSC does not handle individual complaints (see: https://www.icann.org/en/csc/complaints).	Random review of a number of the reports but did not encounter an example. Handled means concluded or under discussion. The CSC is not involved in handling complaints (not its remit), however is informed about details to assess whether systemic issue or not. Very limited number of complaints.	Achieved (For future meetings to be considered, if frequencies is changed, possible impact of duration between meetings)
8.	CSC will, at least annually, conduct a consultation with PTI and ICANN, the primary customers of the naming services, and the ICANN community about the performance of PTI	The CSC meets with the PTI Board and representatives of the ICANN board at least once each year to discuss PTI Performance and related matters. With respect to meetings with the BTC see for example agenda April 2021 (https://community.icann.org/display/CS/C/14+April+2021). For meetings with PTI Board see for example agenda October 2020 (https://www.icann.org/uploads/iana_work_session_asset/attachment/1025/1631302807621Agenda_and_Notes_CSC_Meeting_44_October_2020.pdf)	Information on consultation of primary customers and the ICANN Community is missing. The meetings with the community are scheduled and listed at the ICANN public meeting. Survey is conducted by PTI. Include requirements to list events on the website. Advise annual report. Suggestion to be discussed with CSC at the 2nd meeting. If so, it should not be too cumbersome.	Not Achieved (because of pandemic)
9.	CSC, in consultation with the registry operators, is authorized to discuss with ICANN and PTI ways to	The CSC is mandated to discuss the provisioning of IANA Naming Services through the process for amending the IANA Naming Service Level Agreements	Validated	Achieved

	Metric	2 nd Review Assessment	Findings	2nd Review Outcome
	enhance the provision of IANA's operational services	<p>(https://www.icann.org/en/system/files/files/iana-naming-function-sla-amendment-process-28mar19-en.pdf)</p> <p>According to process 3 Service Level Agreements have been changed/introduced:</p> <ul style="list-style-type: none"> - Technical checks - Processing IDN Table (new SLA) - ccTLD delegation/transfer (amendment) <p>Additionally the CSC together with PTI explored need to change the a SLA (see above item # 3) and whether there is a role if any, with respect to DNSsec KSK (for example see: item 6 agenda and notes CSC Meeting 45, https://www.icann.org/uploads/iana_work_session_asset/attachment/1027/1631302836785Agenda_and_Notes_CSC_Meeting_45_-_18_November_2020.pdf)</p>		
10.	Where ICANN and PTI have been responsible for implementing recommended changes to operational services or the Service Level Agreements, the CSC is confident that has been completed appropriately	<p>See examples:</p> <ul style="list-style-type: none"> - Technical checks - Processing IDN Table (new SLA) - ccTLD delegation/transfer (amendment) <p>The conclusion of implementation of an amended SLA is integral part of the amendment process (See Amendment process, Section II, sub 5,</p>	Validated	Achieved
11.	CSC is providing a liaison to the IANA Functions Review Team	The CSC has appointed a liaison to the first IFRT (see: https://community.icann.org/display/ifr/Review+Team+Composition)	Validated	Achieved
12.	CSC is providing a liaison to a Separation Cross Community Working Group	To date, a separation cross community working group has not been established..	Validated	N/A
13.	Meeting attendance of CSC members	<p>Attendance of the meetings for CSC Members is recorded here: https://community.icann.org/display/CS/Attendance?preview=/84216784/180028098/CSC_Attendance%20Tracker%2020_2021%20JAN-%20OCT.xlsx</p>	<p>According to the attendance sheet, the minimum of nine meetings in a one year period has not always been met, in part due to the rotation of call times that sometimes means it is not feasible to attend. However the requirement that a "member should not be absent for more than two</p>	Not Achieved

	Metric	2 nd Review Assessment	Findings	2nd Review Outcome
			<i>consecutive meetings</i> ", has not been breached.	
14.	Meeting attendance of CSC liaisons excluding PTI Liaison	Attendance of the meetings for CSC Liaisons is recorded here: https://community.icann.org/display/CSC/Attendance?preview=/84216784/180028098/CSC_Attendance%20Tracker%2020_2021%20JAN-%20OCT.xlsx	According to the attendance sheet, the minimum of nine meetings in a one year period has not always been met. In some cases a liaison did not attend two or more consecutive meetings.	Not Achieved
15.	Implementation 1 st Effectiveness Review Recommendations	<p>Recommendation 1: The CSC is to document and publish the procedure for how the CSC intends to deal with complaints they receive from individual PTI customers.</p> <p>Current status</p> <p>See Message on website: https://www.icann.org/en/csc/complaints</p> <p>A link to the IANA complaint process is also included on CSC website.</p> <p>Recommendation 2: The CSC provides appointing organizations with attendance records on a regular basis, at least every year in the month of May, and, where minimum attendance requirements are not being met, the Chair of the CSC formally notifies the appointing organization.</p> <p>Current Status</p> <p>The attendance for each meeting is r documented: Also noted that due to the geographic spread of members and liaisons of the CSC, it has adopted a rotational call schedule (10.00 UTC, 18.00 UTC and 02.00 UTC). Members understand the need to attend.</p> <p>Overview per meeting available: https://community.icann.org/display/CSC/Attendance</p> <p>Recommendation 3: The CSC develops an overview of the skills and expertise required on the CSC, and maps the skills of current members and liaisons against the required skill set to inform the</p>	<p>Rec 1: Validated</p> <p>Rec 2: Attendance is recorded and published. No information about providing updates to the appointing organizations, as (lack of) attendance has not been an issue. Communities are informed</p> <p>Rec3: Validated</p> <p>Rec4: Validated</p>	<p>Rec 1: Achieved</p> <p>Rec 2: partially achieved</p> <p>Rec 3: Achieved</p> <p>Rec 4: Achieved.</p>

	Metric	2 nd Review Assessment	Findings	2nd Review Outcome
		<p>selection process of the appointing organizations.</p> <p>Current Status</p> <p>Skill overview has been produced. Appointing organizations use it in their call for volunteers. Currently membership is very stable.</p> <p>See skill matrix: https://www.icann.org/en/system/files/files/csc-skill-set-matrix-members-liaisons-04jun19-en.pdf</p> <p>Recommendation 4: The CSC develops an induction program that new members and liaisons are required to participate in and complete.</p> <p>Current Status</p> <p>Introduction of new members and liaisons: Subscription to email list upon appointment. On-boarding session(s) with appointee, chair, vice-chair and staff.</p> <p>See: https://www.icann.org/en/system/files/files/csc-overview-members-liaisons-04jun19-en.pdf</p>		

Annex B: Comparison Findings 1st and 2nd CSC Review

	Metric	Outcome 2 nd Review	Outcome 1 st Review
1.	CSC monitors the performance of the IANA naming function against agreed service level targets on a regular basis	Achieved	Achieved
2.	CSC analyses monthly reports provided by PTI and publishes their findings		
3.	CSC follows up where required on any performance issues identified and agrees on a plan for resolution with PTI and ICANN	Achieved	Achieved
4.	Where appropriate, the CSC requests a review or change of a service level agreement.	Achieved	Achieved
5.	Where appropriate the CSC undertakes remedial action to address poor performance in accordance with the Remedial Action Procedures	N/A	N/A
6.	When appropriate remedial action by the CSC has not resolved the poor performance, CSC is authorised to escalate the performance issues to the ccNSO and GNSO for consideration	N/A	N/A
7.	CSC has an effective process for tracking complaints that have been escalated to PTI Management (Escalations), and CSC Members can be directly informed of individual complaints by email.	Achieved	Partially Achieved
8.	CSC will at least annually conduct a consultation with PTI and ICANN, the primary customers of the naming services and the ICANN community about the performance of PTI	Not Achieved	Achieved
9.	CSC, in consultation with the registry operators, is authorised to discuss with ICANN and PTI ways to enhance the provision of IANA's operational services	Achieved	Achieved
10.	Where ICANN and PTI have been responsible for implementing recommended changes to operational services or the Service Level Agreements, the CSC is confident that has been completed appropriately	Achieved	Achieved
11.	CSC is providing a liaison to the IANA Functions Review Team	Achieved	Achieved
12.	CSC is providing a liaison to a Separation Cross Community Working Group	N/A	N/A
13.	Meeting attendance of CSC members	Not Achieved	Achieved
14.	Meeting attendance of CSC liaisons excluding PTI Liaison	Not Achieved	Not Achieved

Annex C -Response Public comments Initial Report on the Second CSC Effectiveness Review

Proceeding Link:

<https://www.icann.org/en/public-comment/proceeding/initial-report-on-the-second-csc-effectiveness-review-14-09-2022>

Section 1: What We Received Input On

The CSC Effectiveness Review Team sought input on its findings and recommendations (sections 4 and 5 of the Initial Report). Section 4 contained the findings and recommendations pertaining to the effectiveness of the CSC in performing its tasks as listed in the CSC charter and whether the CSC has implemented the recommendations of the first CSC Effectiveness Review. In Section 5 of the report, the Team presented its findings and recommendations on seven additional topics which were identified and which could impact the future effectiveness of the CSC.

Outcome:

The RT received (eight) 8 submissions, (six) 6 from community groups, one (1) of which was accepted after closure of the public forum. One (1) was from an external organization, and two (2) from individuals, of which one (1) was spam. This comment is not referenced below. In their comment the submitters covered [x] topics. The comments are categorized into three categories of comments: general, specific, and not related to the Effectiveness Review.

The Public Comment summary report only includes the ICANN org staff summary of the comments. The review team has reviewed the comments and considered whether to amend its findings and recommendations.

Based on the comments, questions and suggestions the RT has concluded to:

Section 2: Submissions

Organizations and Groups:

Name	Submitted by	Initials
NIC United Kingdom of Great Britain and Northern Ireland (UKGBNI)	Andrew Hallfamn	UKGBNI
Country Code Names Supporting Organization	Alejandra Reynoso	ccNSO
Customer Standing Committee	Brett Carr	CSC
Registry Stakeholder Group	Unknown	RySG
At-Large Advisory Committee (ALAC)	Unknown	ALAC
Cross-Community Working Party on ICANN and Human Rights (CCWP-HR)	Ephraim Kenyanito	CCWP-HR

Individuals:

Name	Affiliation (if provided)	Initials
Bolutife Adisa	Unknown	BA

Section 3: Summary of Submissions and RT response

General Comments

The ALAC, ccNSO Council, CCWP-HR, CSC and RySG, generally expressed their support for the findings and recommendations of the review team. However, each group did make some specific comments, which will be summarized below in the specific comments section.

In addition, and as a general comment, the ccNSO supports the conclusion that the CSC operates effectively. The ccNSO welcomes that the CSC has an excellent working relationship with PTI and expects that this working relationship will continue in the future. The ccNSO supports the conclusion that the limited role and remit of the CSC should not be expanded.

RT response

The RT welcomes the support of ALAC, ccNSO, CCWP-HR, CSC and RySG.

Specific Comments

On the recommendation of appointment of alternates

Comment BA

BA commented that the appointing organizations should ensure a requirement that addresses the time zone difference while selecting an alternate for the CSC appointees.

RT response

While the Team agrees this should be a consideration in selecting alternates, we note that the selection of the alternate will be the responsibility of the appointing organizations. The Team is also aware that the RySG and ccNSO individual selection processes put an emphasis on the expertise and experience of their appointees with the IANA naming Function. The RT will include the suggestion that if an appointing organization intends to appoint an alternate, then the time zone diversity should be given a high priority.

Need to adjust the Initial Report?

No need to adjust the report

Comment ALAC

ALAC supports the appointment of an alternate by each SO/AC for their member/liaison of the CSC. The alternate should be given access to all information which a CSC member/liaison receives and be invited to attend to CSC meetings (in an observer role if need be).

RT response

The RT fully supports this suggestion by ALAC. Only if an alternate has full access, the alternate can step-in when needed. The RT will include this as suggestion for the CSC

Need to adjust the Initial Report?

The recommendation has been updated to reflect that an alternate should have the same access to information as the appointed members and liaisons, including - but not limited to - subscription to the CSC email list.

Comment ccNSO

The ccNSO supports the recommendation that the CSC appointing organizations appoint alternates. However they should be informed timely that a regularly appointed member or liaisons will not be able to attend and must be kept abreast of the discussions in the CSC.

RT response

The RT fully supports this suggestion by the ccNSO. Only if an alternate has the same access to information as the appointed member, the alternate can step-in when needed. The RT will include this as a suggestion for the CSC.

Need to adjust the Initial Report?

The recommendation has been updated to reflect that an alternate should have the same access to information as the appointed members and liaisons, including - but not limited to - subscription to the CSC email list.

On the development of framework to review SLAs***Comment ALAC***

ALAC supports the development of such a framework.

RT response

The RT welcomes the comments from ALAC on this topic

Comment RySG

The RySG agreed that a regular review of the SLAs would be appropriate. However, they noted that the need to “develop a framework” for such a review may be too overly process-oriented, given the quality of the current “Process for Amending IANA Naming Service Level Agreements”. This current process for amendment has sufficient involvement of direct customers such that cross-SLA impacts would be accounted for during an amendment process. The RySG recommends that the report will be updated to remove the recommendation that a new Framework for regular SLA reviews be developed.

RT response

The RT appreciates the comments of the RySG. The RT agrees that the SLA review should not be overly process-oriented. At the same, the RT notes that a generic SLA review was not considered when the Process for amending IANA Naming Service Level Agreements was developed. During the conversations on this topic between the CSC and PTI, it was raised that by its very nature, a general review of the SLA may have broader ramifications than just reviewing or adding individual SLAs for which the current Process was designed. For example, the frequency of such a review, and impact of the review. The suggestion that the CSC and PTI develop a Framework is to ensure that both PTI and the CSC work through the issues associated with a general review, and document how and when they want to engage with the direct customers and other stakeholders. At the same time the RT believes that the current p does provide a solid basis for such a Framework.

Need to adjust the Initial Report?

The Recommendation in the Report has been expanded to provide a better explanation of why the Team supports the suggestion of the CSC and PTI to develop a Framework first and the difference between such a general review and the change procedure of a single or limited number of SLAs for which the “Process for Amending IANA Naming Service Level Agreements” was developed.

Comment CSC

The CSC has consulted with the PTI and other bodies regarding the need to periodically review these SLAs to ensure that they remain relevant and covering IANA's activities in the area of the naming function, but there has been little guidance in existing process documents on how this would be initiated and conducted. The CSC welcomes the Team's recommendation that such periodic reviews be undertaken and initiated by the CSC in close cooperation with the PTI.

RT response

The RT welcomes the response from the CSC

Need to adjust the Initial Report?

No need to adjust the report

ccNSO Comment

The ccNSO believes strongly that IANA Naming Function SLAs should be reviewed periodically to ensure longer-term trust in the model. The SLAs should remain relevant, up-to-date and adequate and be used as a mechanism to avoid the emergence of issues, which could have been avoided if the SLAs were up-to-date. The ccNSO also supports the development of a SLA Review Framework, which needs to be supported by the direct customers to ensure that direct customers are informed and involved in such a review process. The ccNSO suggests that such a review should be done at most once every five (5) years after the results of the previous review have been implemented or if circumstances (to be determined by PTI and CSC) do require such a review.

RT response

The RT welcomes the response from the ccNSO. The RT will suggest to the CSC and PTI to take the ccNSO suggestions into consideration when developing a Framework. The RT notes that such a Framework will require an amendment of the current Process and to amend the current Process both the ccNSO and RySG must be consulted by the CSC, before of the amended process can be approved by the CSC, PTI and ICANN.

Need to adjust the Initial Report?

The Report has been amended to reflect the comment of the ccNSO.

Comment CWG-HR

The CWG-HR urges to adopt a holistic approach in interpreting SLA obligations to ensure that IANA works with registries and registrars to ensure that all IETF RFCs applicable to DNS operations are implemented in order to ensure robust DNS server operations. Such an approach of amendments to the SLA would assist to ensure that IANA and its direct customers operate their systems in a manner that is focused on the registrant and do not act in any way that indirectly harms registrant through any act or omission.

RT response

The RT welcomes the comments of the CWG-HR. The RT appreciates the importance of implementation of applicable IETF RFCs. However, the suggestion of the CWG-HR is out of scope of the proposed SLA review. The proposal to introduce a general SLA is related to the IANA Naming Function services provided by PTI to its direct customers (defined in the CSC charter as: top-level domain registry operators, but also include root server operators and other non- root zone functions) and the SLA defined through the IANA Naming Function Contract between ICANN and PTI. They do not relate to implementation of the relevant RFCs by registrars and registries.

Need to adjust the Initial Report?

No need to adjust the report

On the selection of the chair and vice-chair of the CSC**ALAC Comment**

ALAC supports the current practice that preferably the chair of the CSC should be a RySG or ccNSO appointed member, however if no CSC member is available, a CSC liaison with direct knowledge of the role and processes of the CSC, may fill the role of chair.

RT response

The RT welcomes the comments of ALAC, and believes this is in line with the RT's findings and charter of the CSC.

Need to adjust the Initial Report?

No need to adjust the report

On the frequency of meetings and meeting attendance

Comment ALAC

ALAC supports the existing arrangements for monthly meetings. However, if a meeting is canceled, the reports on the PTI performance should still be circulated monthly and if there are any concerns with the report, a meeting should be called to address those concerns.

RT response

The RT welcomes the comments of ALAC, and believes this is in line with the RT's findings and practices of the CSC.

Need to adjust the Initial Report?

No need to adjust the report

Comment RySG

The RySG stated that it does not understand the rationale for the recommendation related to the topic of frequency of meetings. No indication is provided regarding the level of engagement of current CSC members, whether by email, or in another way. Although issues related to meeting attendance are mentioned, no information is provided whether members who are not participating in the meetings are disengaged.

Relating to this topic, the RySG made the following recommendations:

- The next CSC Review should consider measures of CSC Member engagement that are broader and more meaningful than meeting attendance.
- The CSC should be allowed more control over its meeting schedule to be able to change meeting frequency to every other month.
- The CSC should adjust its attendance rules so that under certain conditions a member or liaison can assign their proxy to the other member from the same appointing organization.
- Appointing organizations should be allowed, but not required to appoint Alternates for Members/Liaisons.

RT response

The RT welcomes the comments of the RySG. In preparing its recommendations, the RT discussed the engagement of the members. As noted in the Initial Report, based on the conversations with PTI, PTI Board and CSC itself, the Team believes that the high level of effectiveness of the CSC is primarily related to *“the caliber and dedication of the CSC members and liaisons. Even though the current CSC team had not had the opportunity to meet in person due to COVID, it is evident to the Team that the CSC works well together and is well-guided in the carriage of their work by processes and procedures established by the inaugural CSC.”*

In the conversations with the CSC, lack of engagement was not raised as a reason for non-attendance, now or in future.

With respect to the recommendation of the RySG that the RT should consider measures of CSC Member engagement that are broader and more meaningful than meeting attendance, the RT believes that, as stated above, the membership is engaged. However, in light of the limited composition of the CSC (4 members, and 4 liaisons) the rotating meeting times (a rotation of 8 hours per meeting) are onerous on members and liaisons.

With respect to the RySG's suggestion that the CSC should be allowed more control over its meeting schedule to be able to change meeting frequency to every other month, the following: The Team notes that the CSC charter prescribes monthly meetings. The Team also found that a regular cadence of meetings is considered important by both the CSC and PTI to maintain the good working relationship and engagement with the work of the CSC. The team therefore believes that reducing the number of meetings would not reduce the level of non-attendance in light of the time-zone issues and the relatively small size of the group.

With respect to the recommendation to introduce proxies, the Team notes that the level of attendance does not directly affect the decision prowess of the CSC. The CSC has ensured in its procedures that decisions can be taken either at meetings, and if the meeting is not quorate on-line (see: <https://www.icann.org/en/system/files/files/guideline-csc-practices-24mar17-en.pdf>). However, as stated, regular meeting attendance is needed to ensure cohesion of the CSC and good working relations among the membership and with PTI.

Finally the RT concurs with the RySG that appointing organizations should be allowed, but not required to appoint Alternates for Members/Liaisons. The RT recommended that the appointing organizations are strongly encouraged to appoint one (1) alternate, who could perform the role of a member or liaison, when a member or liaison is not able to attend a scheduled meeting

Need to adjust the Initial Report?

The report has been adjusted to reflect that the appointing organizations are (strongly) advised to appoint alternates.

Comment ccNSO

The ccNSO notes that according to the CSC Charter, members and liaisons are expected to attend at least nine (9) meetings in a one-year period, and the CSC is expected to meet every month. The ccNSO also notes that since its creation, the CSC meets on average ten (10) times a year. The ccNSO considers this requirement - to attend at least nine (9) meetings annually (= 90 % of the meetings) quite onerous, also in light of the rotating meeting times. The ccNSO suggests that - without amendment of the CSC Charter – the CSC and community interpret the attendance requirement to mean that members and liaisons are expected to attend 75 % of the meetings annually.

The ccNSO supports not to reduce the number of meetings should not be reduced. Regular meetings ensure the cohesion of the CSC and maintain the working relationship between the CSC and PTI.

The ccNSO suggests that the CSC should regularly inform the relevant appointing organizations about the meeting attendance of their appointed members and liaisons.

RT Response

The RT welcomes the comment of the ccNSO, and appreciates the suggestion that the CSC and community interpret the attendance requirement to mean that the CSC membership is expected to attend 75 % of the annual meetings. However, the RT notes the proposed interpretation is ultimately a matter between the CSC, the appointing organization and the individual member or liaison. According to the Article 17.2 (g) of the ICANN Bylaws and the CSC Charter failure to meet the attendance requirement **may** result in the Chair of the CSC **requesting** a replacement from the respective organization (emphasis added). The RT is of the view that the Bylaws and Charter support the suggestion of the ccNSO.

The RT welcomes the comments of the ccNSO of the ccNSO with respect to the meeting frequency and will support the suggestion that the CSC more actively inform the appointing organization about attendance of the meetings by their attendees.

Need to adjust the Initial Report?

No need to adjust the report

Attracting committee members with the right profile

Comment CSC

The CSC recognizes that attracting members & liaisons with the right profile may, and will continue to be an issue. The CSC will support efforts of the involved constituencies to attract and find appropriate candidates.

Response RT

The RT welcomes the comment from the CSC.

Need to adjust the Initial Report?

No need to adjust the report

Comment ccNSO

The ccNSO notes the observation of a decreasing interest in becoming a member or liaison of the CSC. The ccNSO agrees with the observation of the Review Team that the *“effectiveness and success of the CSC is to a great extent due to the quality, expertise and commitment of the membership of the CSC”*. However from a ccNSO perspective this is not a general trend.

]

Response RT

The RT welcomes the comment from the ccNSO and is pleased to note the ongoing interest in CSC of the ccTLD community. However, the Team notes that other appointing organizations have more difficulty in attracting the interested candidates, see also comment from the CSC..

Need to adjust the Initial Report? No need to adjust the report

Comments not-related to the effectiveness review of the CSC.

On Scope of the CSC

Comment UKGBNI

The UKGBNI is of the opinion that the CSC does not seem to be of great importance to ICANN, as a number of consumer rights have been violated by abusive practices by ICANN, Registries and registrars.

Comment CCWP-HR

According to CCWP-HR the mandate of the CSC can be expanded in order for it to be responsive to needs of indirect customers and beneficiaries of IANA such as registrants and website visitors (and/or the community at large).

Response RT

According to the ICANN Bylaws article 17.1 and the Charter, the remit of the CSC is limited to:
To monitor PTI's performance under the IANANaming Function Contract and IANA Naming Function SOW.

The mission of the CSC is to ensure continued satisfactory performance of the IANA naming function for the direct customers of the naming services. The direct customers of the naming services are top-level domain registry operators as well as root server operators and other non-root zone functions.

AS stated in the Initial Report the RT is of the view that As already concluded by the first CSC effectiveness review team, and re-iterated in the discussions by the CSC, the PTI and PTI Board, the limited role of the CSC is a strength and broadening its scope of activities could put the focused approach at risk.

Need to adjust the Initial Report?

No need to adjust the report

Annex D Second CSC EFFECTIVENESS REVIEW TEMPLATE

Conditionally Adopted by the ccNSO Council: 3 August 2021

Version 2

Adopted by the GNSO Council: 19 August 2021

Adopted by the ccNSO Council: 26 August 2021

1. Context

Section 17.3 (b) of the ICANN Bylaws and the Charter of the Customer Standing Committee (hereafter: CSC) require that the *“... effectiveness of the CSC will initially be reviewed two years after the first meeting of the CSC; and then every three years thereafter. The method of review will be determined by the ccNSO and GNSO.”*

The CSC was established in October 2016 and conducted its first meeting on 6 October 2016.

In October 2018, the first review of the CSC Effectiveness Review was kicked-off, and was concluded in March 2019, with adoption of the Final CSC Effectiveness Review Report by the ccNSO and GNSO Councils.

2. Intent of the Review

The CSC Effectiveness Review is intended to consider the Effectiveness of the CSC in carrying out its mission as defined in its charter.

3. Measures of CSC Effectiveness

- a. According to Section 17.3 (b) of the ICANN Bylaws and the CSC Charter *“...the method of review will be determined by the ccNSO and GNSO.”* Neither the relevant section of the Bylaws nor the Charter specify what is meant by, or how to measure, *“effectiveness.”*
- b. The mission of the CSC is defined in the relevant section of the ICANN Bylaws and Charter as:
 - i. to ensure the continued satisfactory performance of the IANA function for the direct customers of the naming services; and that this:
 - ii. will be achieved through regular monitoring by the CSC of the performance of the IANA naming function against agreed service level targets and through mechanisms to engage with the IANA Functions Operator to remedy identified areas of concern.
- c. The Scope of Responsibilities in the Charter identifies how the CSC should work:
 - i. The CSC is authorized to monitor the performance of the IANA naming function against agreed service level targets on a regular basis.
 - ii. The CSC will analyse reports provided by the IANA Functions Operator on a monthly basis and publish their findings.
 - iii. Where performance issues have been identified, the CSC will work with the IANA Functions Operator to understand the reasons for the failure and agree a plan for resolution.
 - iv. Either the CSC or the IANA Functions Operator can request a review or change to service level/s, including the removal of existing service levels or the inclusion of new service levels. The procedures will have to be commensurate with the type of the service level change being proposed. Informing the registry operators about proposed changes shall always be required; however, the type of service

level change will determine whether it is necessary to conduct a community-wide consultation.

- v. The CSC is authorized to undertake remedial action to address poor performance in accordance with the Remedial Action Procedures, which have been developed and agreed by the CSC and the IANA Functions Operator.
- vi. In the event performance issues are not remedied to the satisfaction of the CSC, despite good-faith attempts to do so, the CSC is authorized to escalate the performance issues to the ccNSO and GNSO for consideration.
- vii. The CSC may receive complaints from individual registry operators regarding the performance of the IANA Naming Function; however, the CSC will not become involved in a direct dispute between any registry operator and IANA.
- viii. The CSC will review individual complaints with a view to identifying any patterns of poor performance by the IANA Functions Operator in responding to complaints of a similar nature. In relation to problem resolution, if CSC determines that remedial action has been exhausted and has not led to necessary improvements, the CSC is authorized to escalate to the PTI Board and further if necessary.
- ix. The CSC will, on an annual basis or as needs demand, conduct a consultation with the IANA Functions Operator, the primary customers of the naming services, and the ICANN community about the performance of the IANA Functions Operator.
- x. The CSC, in consultation with registry operators, is authorized to discuss with the IANA Functions Operator ways to enhance the provision of IANA's operational services to meet changing technological environments; as a means to address performance issues; or other unforeseen circumstances. In the event it is agreed that a material change in IANA naming services or operations would be beneficial, the CSC reserves the right to call for a community consultation and independent validation, to be convened by the IANA Functions Operator, on the proposed change. Any recommended change must be approved by the ccNSO and RySG.
- xi. The IANA Functions Operator would be responsible for implementing any recommended changes and must ensure that sufficient testing is undertaken to ensure smooth transition and no disruption to service levels.
- xii. The CSC will provide a liaison to the IANA Function Review Team and a liaison to any Separation Cross Community Working Group.

4. Effectiveness can also be measured against these requirements.

- a. the Charter places certain requirements on members of, and liaisons to, the CSC and sets requirements for reporting to the community:
 - i. The CSC should be kept small and comprise representatives with direct experience and knowledge of IANA naming functions;
 - ii. Minimum membership and openness to liaisons;
 - iii. Election of the Chair;
 - iv. primary and secondary points of contact to facilitate formal lines of communication between the CSC and the IANA Functions Operator;
 - v. Meeting frequency and publication of meeting record;
 - vi. Regular CSC updates to the direct customers of the IANA naming function.
- b. In working as a committee, the CSC has needed to define its working methods and in particular to assess how to work with the IFO. This includes defining with the IFO the framework for remedial action and amending Service Level Expectations, and establishing a framework for regular reporting to the community.

5. Method of assessing effectiveness

- a. In its nearly five years of operation, the CSC has regularly monitored the performance of IANA and informed the community of its findings. These monthly reports of the CSC together with the related monthly reports from PTI, provide a useful framework for assessing

the effectiveness of the CSC in developing its relationship with PTI, keeping the direct customers informed of PTI performance and in ensuring that the wider community is also aware of how the PTI is meeting its obligations.

- b. The First Review Team developed a set of metrics drawn from requirements contained in the CSC Charter (see Sections 3 and 4 above) as the basis for assessing the effectiveness of the CSC in performing its role. It is recommended that the Second Review Team adopt the same methodology to ensure a consistent approach and allow for comparison of the effectiveness of the CSC over time. The performance indicators and related metrics are included in Annex A: Overview Metrics, Assessment and Outcome. Where needed the Review Team may draw on the recently concluded IANA Naming Function Review.
- c. In addition, the Second Review Team shall also assess if and to what extent the recommendations from the first review have been implemented and the extent to which the issue identified in the first review has been addressed. Related metrics and performance measures should be developed as considered necessary by the Review Team.
- d. In conducting the Review, the Review Team is encouraged to review publicly available documents and CSC reports to assess how effectively the CSC has performed since the first review and also engage directly with the members of the CSC and PTI as deemed appropriate by the Review Team..
- e. The Review Team is also expected to consider whether and how to consult with the direct customers on whose behalf the CSC is monitoring the performance of the PTI in performing the IANA Naming Functions and other ICANN community groups that appoint liaisons to the CSC about their awareness of the CSC's work and effectiveness and also the PTI Board.

6. Issue which are Out of Scope of the review

If, in the process of the review, the CSC Effectiveness Review Team becomes aware of issues that are out of scope of this 2nd CSC Effectiveness Review, but are considered relevant for the proper functioning of the CSC, it will inform both the ccNSO and GNSO Councils accordingly.

7. CSC Effectiveness Review Team

The ccNSO and GNSO will each appoint two members to CSC Review Team, in accordance with their internal processes. At least one member appointed by the ccNSO Council and one member appointed by the GNSO Council should be related to or associated with a TLD Operator (direct customer of the IANA Naming Function). The CSC is requested to appoint a Liaison to the Review Team. The PTI is also requested to appoint a Liaison to the Review team.

The Review team is expected to appoint a spokesperson who will, when needed, represent the Review Team and speak on behalf of the Review Team.

In developing its output – working method, work plan or any reports or papers - the full Review Team (members and liaisons) shall seek to act by consensus (Full Consensus - a position where no minority disagrees; identified by an absence of objection or Consensus – a position where a small minority disagrees, but most agree)

In the absence of Full Consensus, the Review Team should allow for the submission of minority viewpoint(s) and these, along with the consensus view, shall be included in the report, paper or other relevant deliverable.

In rare cases, the Review Team may decide to use of a poll to assess the level of support for a deliverable. However, care should be taken in using polls: they should not become votes, as there are often disagreements about the meanings of the poll questions or of the poll results. Such a poll shall be limited to the members appointed by the ccNSO and GNSO Councils and the polling should be recorded and included in the deliverable.

8. Proposed Review Process

The role of the CSC Effectiveness Review Team is to:

1. Conduct a review of the CSC Effectiveness in accordance with the elements identified above. The review will include an analysis of governance or guiding documents developed during the implementation phase of the CSC, drafting of ICANN's bylaws only if considered to be relevant by the Review Team.
2. Conduct interviews with the CSC and the PTI to determine whether the CSC is fit for purpose and effective and whether measures should be taken to enhance the effectiveness of the CSC from their perspective.
3. Conduct a public session at or around ICANN72 (October 2021) that is intended to provide an opportunity for the community to provide input to the process.
4. Produce a Report on the outcome of the review. This report should also include suggested recommendations, if any, to improve the effectiveness of the CSC. The Report will be submitted to the ccNSO and GNSO Councils for discussion and adoption at the time foreseen in section 9, Review Schedule.

9. Review Schedule

The Review Schedule provided below is indicative only and will need to be reviewed and confirmed by the Review Team once appointed. However, it is the expectation of both the GNSO and ccNSO Councils that the review will be concluded within 12 months of the initial meeting of the Review Team.

September 2021- Adoption of Template for effectiveness review and appointment of the Review Team

- By 30 September 2021, the ccNSO and GNSO Councils are expected to have adopted the template for review of the effectiveness of the CSC and as a result have determined the method of the CSC Effectiveness Review.
- Each of the Councils is also expected to have appointed their members by 30 September 2021.

October 2021

- *Initial meeting of the CSC Effectiveness Review Team*
- *Agreement on scope, process and timeline*

November 2021 Consultation with CSC and PTI

- Informal consultations if considered necessary by the Team
- Virtual Public Consultation (open session) & Interview CSC and PTI
- Virtual Public consultation direct customers and other interested parties (ccTLD, gTLD operators, others) post ICANN72

December 2021 – January 2022 Draft Report on findings & recommendations

- Preparation draft initial report, including recommendations, if any. Include findings, report on identified issues, if any, and recommendations to resolve issues.

1 February 2022 Public comment period on draft report

- Virtual meeting to alert and introduce on findings prior to or during first week of Public comment period.
- Public comment period 40 days

April 2022 - Finalization Report and submission to ccNSO and GNSO Councils

- Publication and submission of the Final Report to ccNSO and GNSO Councils for adoption according to their own rules and procedures.
- Following the adoption of the report by the ccNSO and GNSO Councils, the review team closes.
- ccNSO and GNSO Councils inform CSC and ICANN of result.

10. Omission in or unreasonable impact of the Template

If, in the process of conducting the Review, the Review Team determines that the Template does not provide sufficient guidance and/or the impact of the Template is found to be unreasonable for conducting the business of the Review, the Review Team has the authority to determine a proper course of action to mitigate the issue. Any proposed modification to the Template shall only be effective after approval by the ccNSO and GNSO Councils. The Review Team shall exercise reasonable discretion with respect to whether this Template does not provide guidance and/or the impact of the Template is unworkable with respect to the conduct of business of the Review Team.

11. References

- Charter Customer Standing Committee - <https://www.icann.org/en/system/files/files/csc-charter-amended-27jun18-en.pdf>
- CSC Charter review team - <https://community.icann.org/display/CRT/CSC+Review+Team+Home>
- First CSC Effectiveness Review - <https://community.icann.org/display/ER>

ANNEX E- CSC Charter adopted June 2018

Charter of the Customer Standing Committee (CSC)

Mission

The Customer Standing Committee (CSC) has been established to perform the operational oversight previously performed by the U.S. Department of Commerce's National Telecommunications and Information Administration (NTIA) as it relates to the monitoring of performance of the IANA naming function. This transfer of responsibilities took effect on October 1, 2016.

The mission of the CSC is to ensure continued satisfactory performance of the IANA function for the direct customers of the naming services. The direct customers of the naming services are top-level domain registry operators, but also include root server operators and other non-root zone functions.

The mission will be achieved through regular monitoring by the CSC of the performance of the IANA naming function against agreed service levels and through mechanisms to engage with the IANA Functions Operator to remedy identified areas of concern, including but not limited to the Remedial Action Procedures.

The CSC is not authorized to initiate a change in the IANA Functions Operator via a Special IANA Function Review, but could escalate a failure to correct an identified deficiency to the ccNSO and GNSO Councils, who might then decide to take further action using agreed consultation and escalation processes, which may include a Special IANA Function Review.

The CSC will be the primary interface between the IANA Naming Functions Operator, currently PTI, and its customers. Should PTI cease to be the IANA Naming Functions Operator, there should be an obligation on successor operators to work with the CSC to ensure satisfactory performance of the IANA naming functions.

Scope of Responsibilities

The CSC monitors the performance of the IANA naming function against agreed service levels on a monthly basis.

The CSC will analyze reports provided by the IANA Functions Operator and publish their findings on a monthly basis.

Where performance issues have been identified, the CSC will work with the IANA Functions Operator to understand the reasons for the failure and agree a plan for resolution.

The CSC or the IANA Functions Operator can request a review or change to service level/s.

The CSC, in consultation with the IANA Functions Operator, will develop procedures for changing service level/s including the removal of existing service levels or the inclusion of new service levels. These procedures will be commensurate with the type of the service level change being proposed. Informing the registry operators about proposed changes shall always be required; however, the type of service level change will determine whether it is necessary to conduct a community-wide consultation. The procedures may be updated from time to time and will only become effective after publication of the process on the CSC webpage, and after informing the ccNSO Council and RySG, the direct customers.

The CSC is authorized to undertake remedial action to address performance issues in accordance with the Remedial Action Procedures (RAP) published on the CSC website. The RAP may be updated from time to time in accordance with the change mechanism foreseen in the RAP.

Should a new IANA Functions Operator be appointed, for example through the recommendations from the Special IANA Naming Function Review Team⁴, the ccNSO and GNSO Councils will require the CSC to review and revise the RAP as necessary with the new operator.

In the event performance issues are not remedied to the satisfaction of the CSC, despite good- faith attempts to do so, and following the agreed escalation processes contained in the RAP, the CSC is authorized to escalate the performance issues to the ccNSO and GNSO Councils for consideration.

The CSC may receive complaints from individual registry operators regarding the performance of the IANA Naming Function; however, the CSC will not become involved in a direct dispute between any registry operator and the IANA Functions Operator.

The CSC will review individual complaints with a view to identifying whether there are any patterns of poor performance by the IANA Functions Operator in responding to complaints of a similar nature. The CSC may invoke the RAP if necessary to resolve performance issues that may be systemic or persistent.

The CSC will, as need demands, conduct consultations with the IANA Functions Operator, meet with the direct customers of the naming services, and the ICANN community about the performance of the IANA Functions Operator.

The CSC, in consultation with registry operators, is authorized to discuss with the IANA Functions Operator ways to enhance the provision of IANA's operational services for any of the following reasons:

- to meet changing technological environments;
- as a means to address performance issues; or
- other unforeseen circumstances.

In the event it is agreed that a material change in IANA naming services or operations would be beneficial, the CSC reserves the right to call for a community consultation and independent validation, to be convened by the IANA Functions Operator, on the proposed change. Any recommended change that does not require a change to the IANA Naming Function Contract must be approved by the ccNSO Council and RySG

The IANA Functions Operator would be responsible for implementing any recommended changes and must ensure that sufficient testing is undertaken to ensure smooth transition and no disruption to service levels.

The CSC will provide a liaison to the CSC Charter Review Team, the CSC Effectiveness Review Team, the IANA Function Review Team and to any Separation Cross Community Working Group.

Conflict of Interest

The ICANN Bylaws make clear that it must apply policies consistently, neutrally, objectively and fairly, without singling any party out for discriminatory treatment; which would require transparent fairness in its dispute resolution processes. Members of the CSC should accordingly disclose any conflicts of interest with a specific complaint or issue under review.

The CSC may exclude from the discussion of a specific complaint or issue any member deemed by the majority of CSC members and liaisons to have a conflict of interest.

Membership Composition

The CSC should be kept small and comprise representatives with direct experience and knowledge of IANA naming functions. At a minimum the CSC will comprise:

- Two individuals representing gTLD Registry Operators appointed by the Registries Stakeholder Group
- Two individuals representing ccTLD Registry Operators appointed by the ccNSO
- One liaison from the IANA Functions Operator (PTI).

⁴ See Section 18.12 ICANN Bylaws

An individual representing a TLD that is not considered to be a ccTLD or gTLD registry, for example from the Internet Architecture Board for .ARPA, may also be included as a member of the CSC. The individual would seek appointment by either the ccNSO or GNSO Council.

Liaisons can also be appointed from the following organizations; however, providing a Liaison is not mandatory for any group:

- One liaison each from other ICANN SOs and ACs:
 - GNSO (non-registry)
 - ALAC
 - NRO (or ASO)
 - GAC
 - RSSAC
 - SSAC

Liaisons shall not be members of or entitled to vote on the CSC, but otherwise liaisons shall be entitled to participate on equal footing with members of the CSC.

The Chair of the CSC will be elected on an annual basis by the CSC. Ideally the Chair will be a direct customer of the IANA naming function and cannot be the IANA Functions Operator Liaison.

The CSC and the IANA Functions Operator will nominate primary and secondary points of contact to facilitate formal lines of communication.

The CSC as a whole will decide who will serve as the Liaison to the IANA Function Review Team. Preference should be given to the Liaison being a registry representative given that technical expertise is anticipated to be valuable in the role.

Membership Selection Process

Members and Liaisons to the CSC will be appointed by their respective communities in accordance with internal processes. However, all candidates will be required to submit an Expression of Interest that includes a response addressing the following matters:

- Why they are interested in becoming involved in the CSC.
- What particular skills they would bring to the CSC.
- Their knowledge of the IANA Functions.
- Their understanding of the purpose of the CSC.
- That they understand the time necessary required to participate in the CSC and can commit to this role.

Interested candidates should also include a resume or curriculum vitae or biography in support of their Expression of Interest.

While the ccTLD and gTLD members will be appointed by the ccNSO and RySG respectively and liaisons by their applicable groups, ccTLD or gTLD registry operators that are not members of these groups will be eligible to participate in the CSC as members or liaisons. The ccNSO Council and RySG should consult prior to finalizing their selections with a view to providing a slate of members and liaisons that has, to the extent possible, diversity in terms of geography and skill set.

A representative for a TLD registry operator not associated with a ccTLD or gTLD registry, will be required to submit an Expression of Interest to either the ccNSO and GNSO Councils. The Expression of Interest must include a letter of support from the registry operator. This provision is intended to ensure orderly formal arrangements and is not intended to imply those other registries are subordinate to either the ccNSO or the GNSO.

The full membership of the CSC must be approved by the ccNSO and the GNSO Councils. While it will not be the role of the ccNSO and GNSO to question the validity of any recommended appointments to the CSC, in approving the full slate the ccNSO and GNSO Councils will take into account the overall composition of the proposed CSC in terms of geographic diversity and skill sets.

Terms

CSC appointments, regardless of whether members or liaisons, will be for a two-year period with the option to renew for up to two additional two-year terms. The intention is to stagger appointments to provide for continuity and knowledge retention.

To facilitate this, at least half of the inaugural CSC appointees will be appointed for an initial term of three years. Subsequent terms will be for two years.

CSC appointees must attend a minimum of nine meetings in a one-year period and must not be absent for more than two consecutive meetings. Failure to meet this requirement may result in the Chair of the CSC requesting a replacement from the respective organization.

A vacancy on the CSC shall be deemed to exist in the case of the death, resignation, or removal of a CSC member or liaison. This vacancy shall be filled by the appointing organization or advisory committee for the unexpired term.

Changing circumstances of appointed CSC member

In the event that a member appointed to the CSC by either the ccNSO or RySG has a change in circumstances that may affect the basis upon which the member was appointed to the CSC, they are required to notify their appointing organization of their changing circumstances. If the member is willing to remain a member of the CSC, they will be required to seek re-confirmation of their appointment. The appointing organization will be responsible for considering the request in accordance with internal procedures.

The appointing organization will be responsible for notifying the Chair of the CSC of its decision and should also notify the other appointing organization.

In the event that the appointing organization is not willing to re-confirm the appointment, the member will be required to resign from the CSC and the appointing organization will be required to fill the vacancy as soon as possible. A temporary replacement may be appointed while attempts are made to fill the vacancy.

If a member wishes to resign from the CSC because of a change in circumstances, or for any other reason, they must notify their appointing organization.

Any new appointment will need to be approved by both the ccNSO Council and the RySG. The GNSO Council should be notified of any new appointment.

Recall of members or liaisons

Any CSC appointee can be recalled at the discretion of their appointing community.

In the event that a ccTLD or gTLD registry representative is recalled, a temporary replacement may be appointed by the designating group while attempts are made to fill the vacancy. As the CSC meets on a monthly basis, best efforts should be made to fill a vacancy within one month of the recall date.

The CSC may also request the recall of a member of the CSC in the event they have not met the minimum attendance requirements. The appointing community will be responsible for finding a suitable replacement.

Meetings

The CSC shall meet at least once every month via teleconference at a time and date agreed upon by members of the CSC.

The CSC will provide regular updates, at least twice per year, to the direct customers of the IANA naming function. These updates may be provided to the RySG and the ccNSO during ICANN meetings.

To allow the CSC to carry out the work identified above and, in particular, to help develop a cooperative relationship with the IANA Functions Operator, the CSC is also required to meet with the Board of the IANA Functions Operator at least twice a year. These meetings should, wherever possible, be held at ICANN meetings.

The CSC will also consider requests from other groups, including the ICANN Board and ICANN org, to provide updates regarding the IANA Functions Operator's performance.

Record of Proceedings

Minutes of all CSC teleconferences will be made public within five business days of the meeting.

In the event that the CSC invokes the RAP, it will be required to inform the RySG, ccNSO and GNSO Councils and provide regular status updates.

Information sessions conducted during ICANN meetings will be open and posting of transcripts and presentations will be done in accordance with ICANN's meeting requirements.

Secretariat

ICANN will provide secretariat support for the CSC and will also be expected to provide and facilitate remote participation in all meetings of the CSC.

Review

The Charter may be reviewed at the request of the CSC, ccNSO Council, RySG or GNSO Council or in connection with an IANA Function Review. The review will be conducted by a committee of representatives from the ccNSO and the RySG in accordance with a method determined by the ccNSO Council and RySG. Each review is to include the opportunity for input from other ICANN stakeholders, via a Public Comment process. Any recommended changes are to be ratified by the ccNSO and the GNSO Councils.

The effectiveness of the CSC will initially be reviewed two years after the first meeting of the CSC; and then every three years thereafter. The method of review will be determined by the ccNSO and GNSO.

Annex F – Membership CSC Effectiveness Review Team

Members

Donna Austin - GNSO appointed
Maarten Simon - ccNSO appointed
Sean Copeland - ccNSO appointed
Jonathan Robinson - GNSO appointed

Liaison Brett Carr – CSC appointed

Expert Advisors

Amy Creamer
Kim Davies
Jennifer Bryce

Support Staff

Bart Boswinkel
Steve Chan
Claudia Ruiz
Caitlin Tubergen