



ICANN | 53   
*Buenos Aires*

21-25 JUNE 2015



# Agenda

1. Introduction – Karen Lentz, ICANN
2. IAG-CCT – Jonathan Zuck, Chair, IAG-CCT
3. CCT Metrics – Eleeza Agopian, ICANN
4. Global Consumer Survey – David Dickinson, Nielsen
5. Economic Study – Greg Rafert, Analysis Group
6. Program Implementation Reviews – Trang Nguyen, ICANN
7. Rights Protection Mechanisms Review – Karen Lentz, ICANN
8. CCT Review Team Prep – Margie Milam, ICANN
9. Root Stability Study – David Conrad, ICANN
10. GNSO Discussion Group – Bret Fausett, Chair
11. GAC Geographic Names Working Group – Nicolas Caballero, GAC
12. GAC Underserved Regions Working Group – Tracy Hackshaw / Alice Munyua, GAC
13. CCWG Use of Country & Territory Names – Heather Forrest / Annebeth Lange
14. SSAC New gTLD Issues Work Party – Jim Galvin
15. Q&A





# Introduction

## Karen Lentz, ICANN

# Introduction – Program Reviews

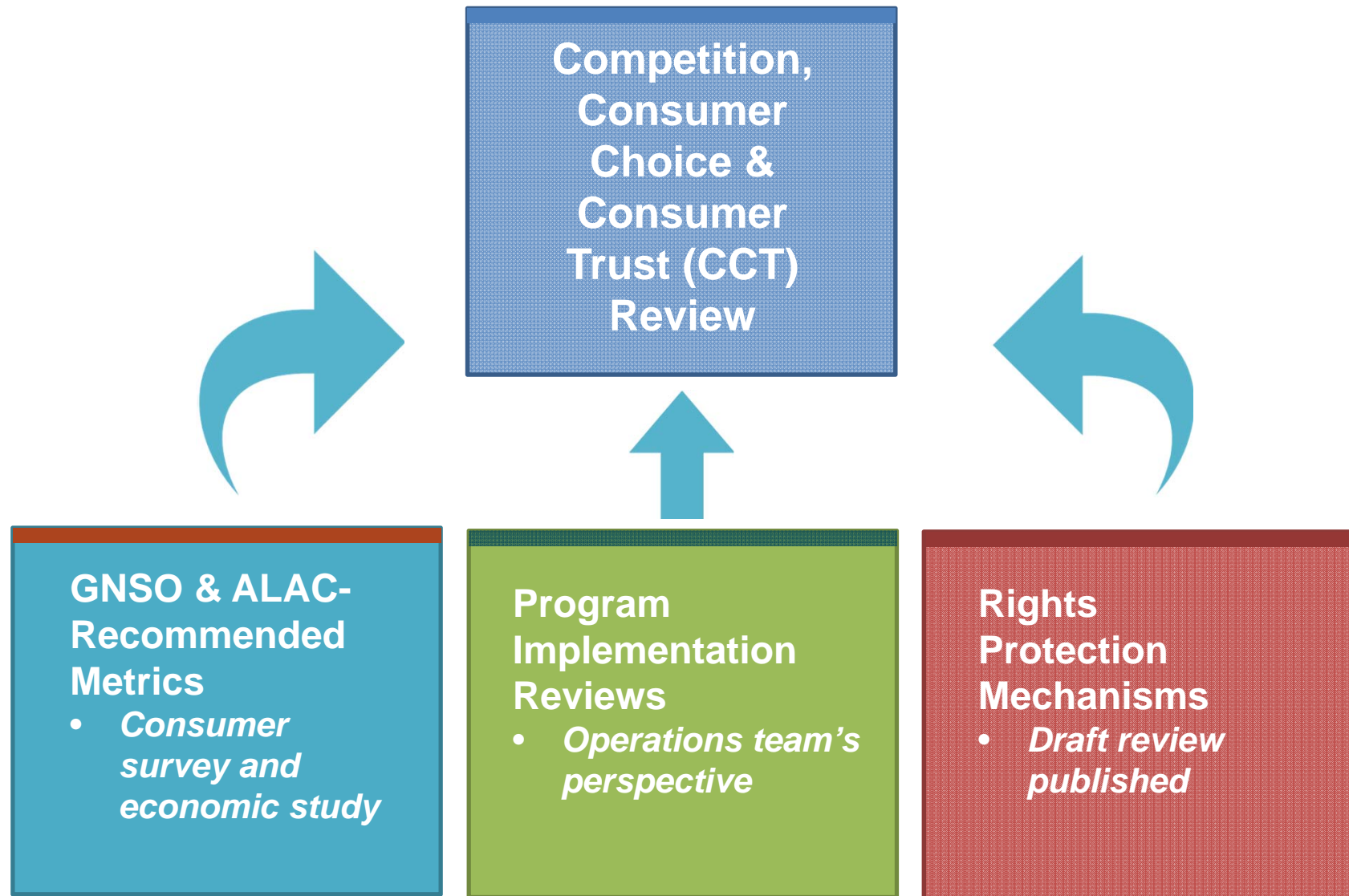
## Program Reviews: Data, Studies, Analysis, Comment

- *Security and Stability Reviews*
- *Program Implementation*
- *Rights Protection Mechanisms*
- *Competition, Consumer Trust, Consumer Choice*

## SO/AC Activities: Policy Development and Advice

- *GNSO Discussion Group*
- *3 GAC Working Groups (WGs)*
- *CCWG Use of Country and Territory Names*
- *SSAC Working Party*

# Introduction







**CCT Review Prep**  
**Jonathan Zuck**  
**Chair, IAG-CCT**

# CCT Review Prep

1

## IAG-CCT formed

Discussed 70 metrics recommended by a joint GNSO-ALAC working group

2

## Metrics and targets

Recommended 65 of 70 metrics, added one on name collisions, suggested data sources and targets for measurement

3

## Survey and economic study

Interim recommendation to conduct a global consumer survey and economic study to capture 13 metrics related to Internet users' and registrants' sense of trust and choice, as well as market competition in the domain name system

4

## Board recommendation

ICANN Board adopted IAG-CCT's recommendation for the collection of 66 metrics at ICANN 52, some of which will help establish baselines and will be compared against data collected one year later

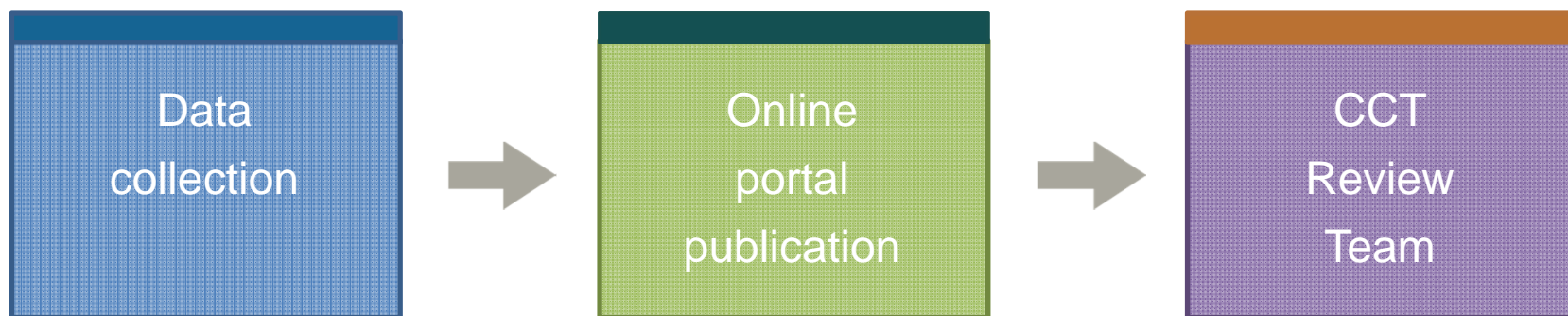


# **CCT Metrics**

## **Eleeza Agopian, ICANN**



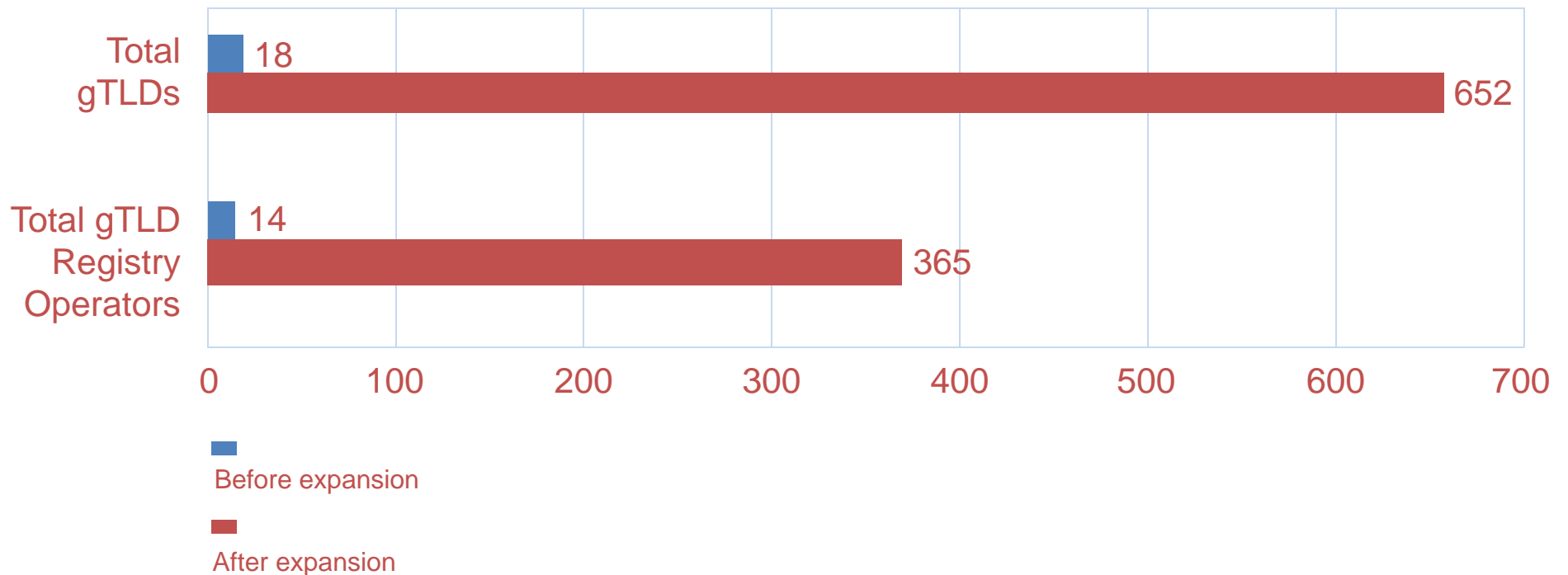
# CCT Metrics – Process



# CCT Metrics – Competition

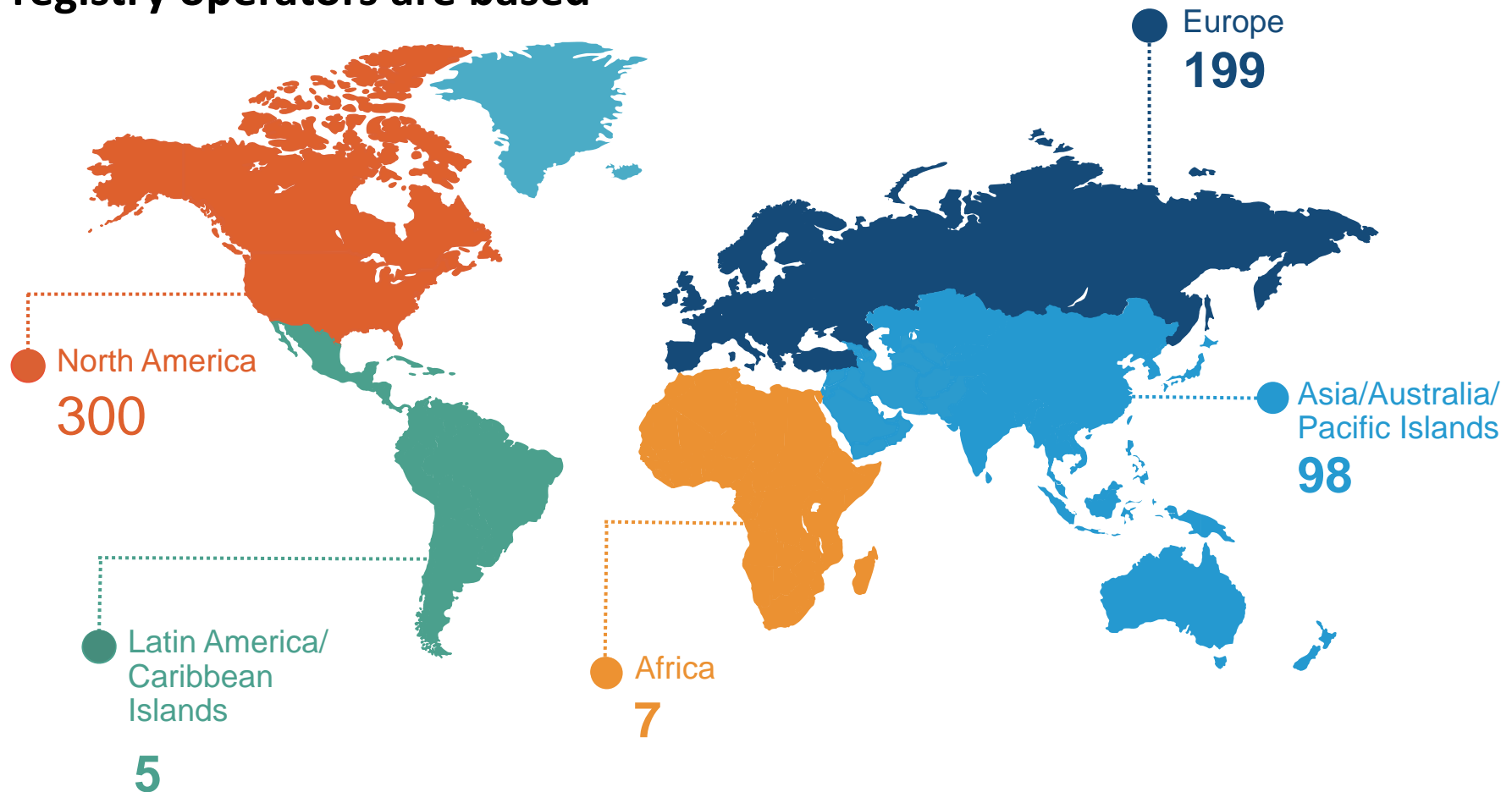
## 3.2 Total gTLDs before and after expansion

## 3.3 Total gTLD registry operators (contracted parties) before and after expansion



# CCT Metrics – Choice

## 2.7 Quantity of legal regimes where new gTLD registry operators are based





# CCT Metrics – Consumer Trust

## 1.9: Uniform Domain Name Dispute Resolution Policy (URDP)/Uniform Rapid Suspension System (URS) Complaints Against Registrants

### 1.10: UDRP/URS Decisions Against Registrants

Year	UDRP Complaints Against Registrants	UDRP Decisions Against Registrants	Percentage of Decisions Against Registrants out of Total Number of Complaints
2012	3987	3573	89.6%
2013	3371	3261	96.7%
2014	3455	2844	82.3%

Year	URS Complaints Against Registrants	URS Decisions Against Registrants	Percentage of Decisions Against Registrants out of Total Number of Complaints
2014	229	183	79.9%



# Global Consumer Survey

## David Dickinson, Nielsen



nielsen  
.....

# ICANN GLOBAL CONSUMER RESEARCH

EXECUTIVE PRESENTATION | BUENOS AIRES

June 2015



# BACKGROUND

ICANN's New TLD Program was developed as part of a community-driven policy development process that spanned several years and aims to **enhance competition** and **consumer choice** for both registrants and Internet users.

## RESEARCH WAS IMPLEMENTED AMONG TWO GROUPS



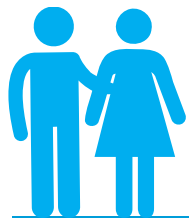
- This report focuses on wave 1 results among the Consumer Segment. A second comparison wave will be conducted in approximately a years time and will provide a set of comparison data.
- Also interviewed were global domain name registrants who will be reported separately.

## GOAL

To assess the current TLD landscape, as well as measure factors such as consumer awareness, experience, choice, and trust with new TLDs and the domain name system in general.

# METHODOLOGY

## QUALIFYING CRITERIA



Adults 18+  
 5+ hours spent per week on Internet  
 Geographically representative of 75% of global  
 online users



ONLINE SURVEY  
 February 2-9, 2015



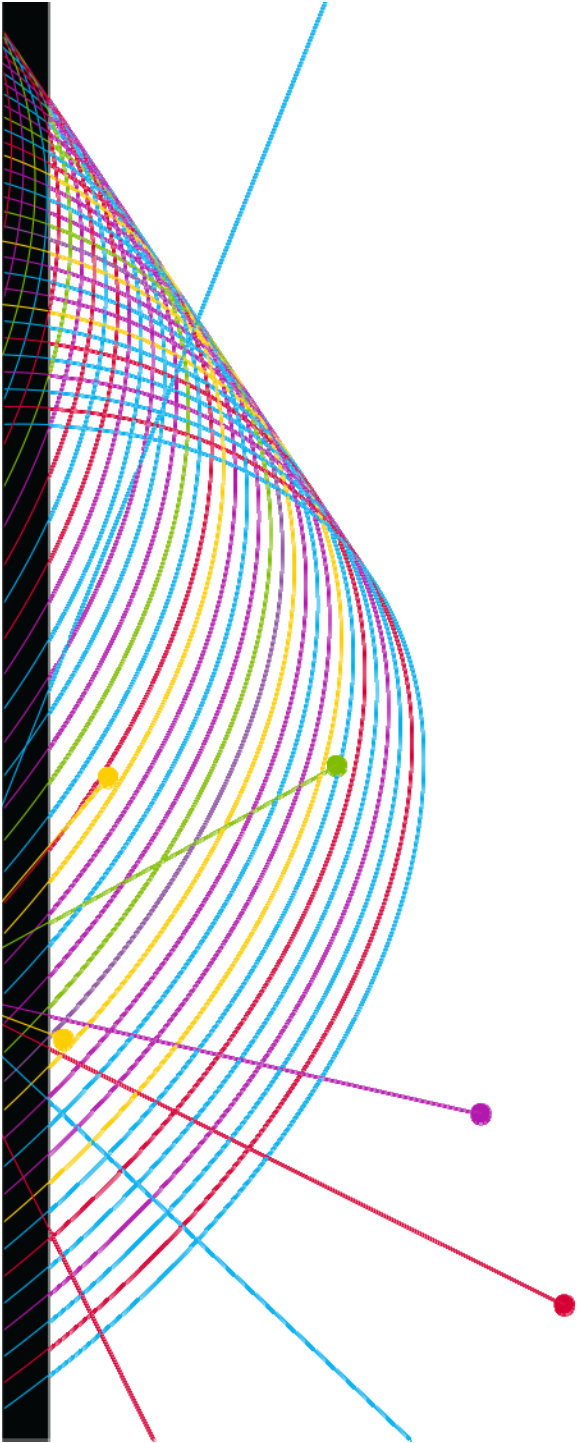
Survey commissioned  
 by ICAAN and  
 conducted by Nielsen



TOTAL OF 6144 CONSUMERS, **24 COUNTRIES**, 18 LANGUAGES

- Argentina
- Brazil
- Canada
- China
- Columbia
- Egypt
- France
- Germany
- India
- Indonesia
- Italy
- Japan
- Mexico
- Nigeria
- Philippines
- Poland
- Russia
- South Africa
- South Korea
- Spain
- Turkey
- United Kingdom
- United States
- Vietnam

# AWARENESS & VISITATION







# AVERAGE AWARENESS & VISITATION

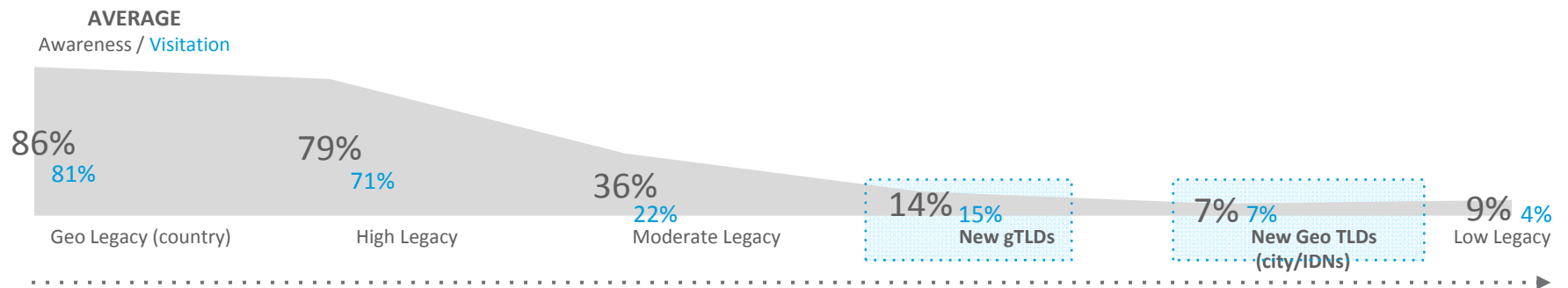
## Familiarity, real or perceived, differentiates extensions

Among legacy TLDs, a **small number of extensions lead awareness**. Despite differences in number of registrations, .com, .net and .org have similar awareness—the virtue of longevity and relevance.

## New TLDs have room to grow

It is interesting that our reference set of new extensions has higher average awareness and reported visitation than the low tier legacy extensions. This reflects a pattern in this research that **interpretability of the extension breeds a sense of familiarity**.

### AWARENESS AND VISITATION BASED ON TOTAL SAMPLE



#### LEGACY

High: .com, .net, .org

Moderate: .info, .biz

Low: .mobi, .pro, .tel, .asia, .coop

Geographically Targeted: based on only those shown in that region

#### NEW

Generic: .email, .photography, .link, .guru, .realtor, .club, .xyz

Geographically Targeted: based on only those shown in that region

# TOTAL AWARENESS & VISITATION

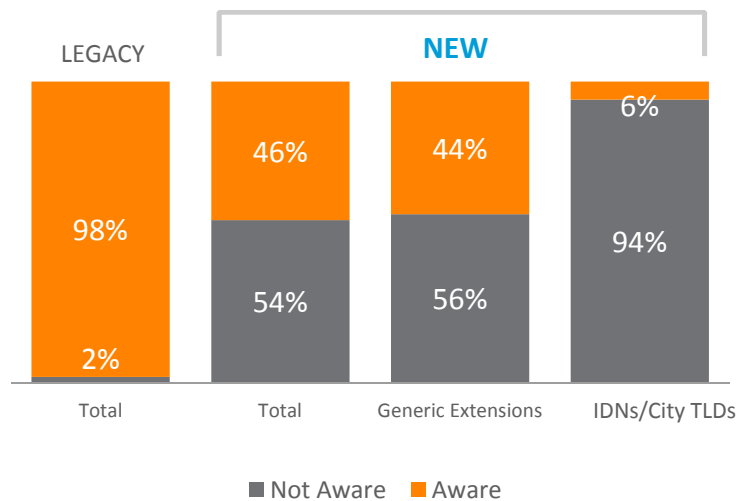
## Awareness generally translates to visitation

Relatively few are aware of a TLD but have low intent to visit it.

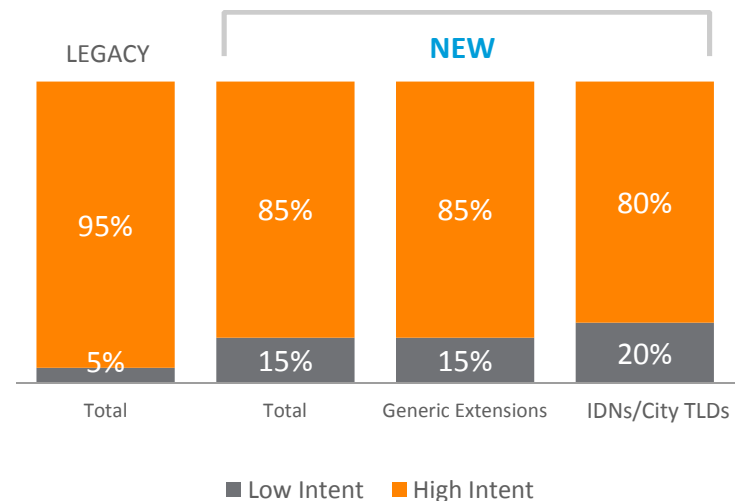
## Perceived relevance of a site is key motivation for intended visitation

Familiarity and perceived relevance also appear to be stronger motivating factors for visiting new TLDs than concerns of legitimacy or trustworthiness.

### AWARENESS



### INTENT TO VISIT



# GTLD PERCEPTIONS

## Reactions to new gTLDs are largely positive

While there are more perceptions related to being confusing, overwhelming or “extreme” for the new TLDs, the key positive themes still show strongly; and **new positive themes related to innovation emerge**.

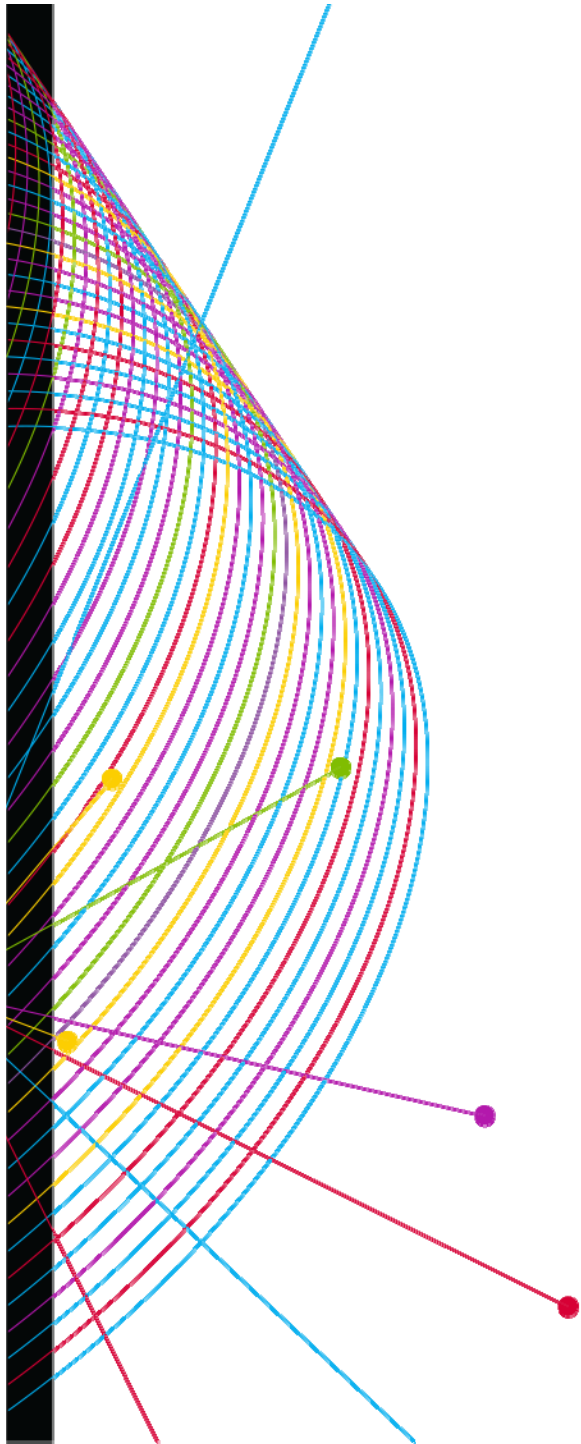
### LEGACY



### NEW



The larger the word, the more commonly that theme appeared in open ended responses



# TRUST





# TRUST IN TLDS

## Newer TLDS have yet to establish high levels of trust

Relative to the top tier legacy TLDS, or to the industry in general, the reference set of new TLDS has relatively lower trust levels.

## Trust can be improved by having some level of purchase restrictions

While there is a general sense that domain registration should have only light/no purchase restrictions, having some level of purchase restriction does increase the perceived trustworthiness of a particular TLD.

LEGACY TLDS AVERAGE TRUST <i>(very/somewhat trustworthy)</i>	TOTAL
Legacy Extensions	<b>90%</b> (88%-96% across regions)
ccTLDs	<b>94%</b> (75%-98% across country)

NEW TLDS AVERAGE TRUST <i>(very/somewhat trustworthy)</i>	TOTAL
New Extensions	<b>49%</b> (39%-53% across regions)
IDNs/City TLDs	<b>47%</b> (26%-64% across country)

Top: .com, .net, .org  
New: .email, .photography, .link, .guru, .realtor, .club, .xyz  
ccTLDs, IDNs and City TLDs: based on only those shown in that region

# TRUST & ABUSE

## Online users generally expect the domain industry to be diligent

Overall, **three-quarters of respondents trust the domain industry to take precautions** about who gets a name, to screen registrants, and/or to give consumers what they expect.

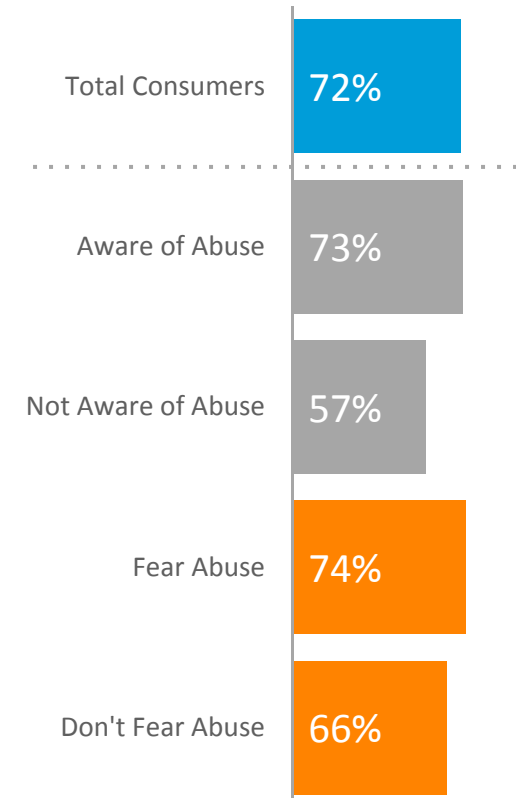
## Awareness of abuse is generally high

Malware, phishing and stolen credentials are all things that at least three quarters of respondents are aware of—cybersquatting is the only bad behavior that the majority are unfamiliar with—only 1 in 3 are aware. Interestingly though, **awareness of these bad behaviors is correlated with higher trust in the domain industry.**

## Fear stems from targeted attacks

Some behaviors, e.g. spamming, are annoyances but do not create strong fear. **However having one's online credentials stolen, or falling victim to malware or phishing, are widespread and relatively strong worries.**

### TRUST IN DOMAIN NAME INDUSTRY





# CONCERN ABOUT STOLEN CREDENTIALS

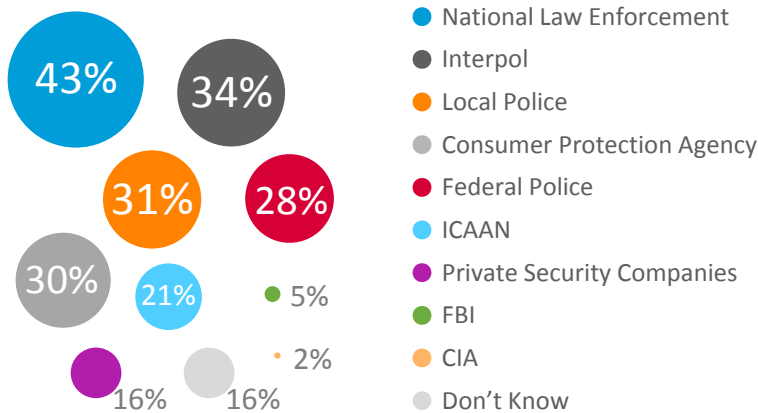
To illustrate, let's look at "stolen credentials"—what people fear most

- Relative to spamming, impact is low, but fear is very high
- Still, they take the same precautions as they do for other bad behaviors—AV software and change habits.
- And they see it as primarily a matter for various branches of law enforcement

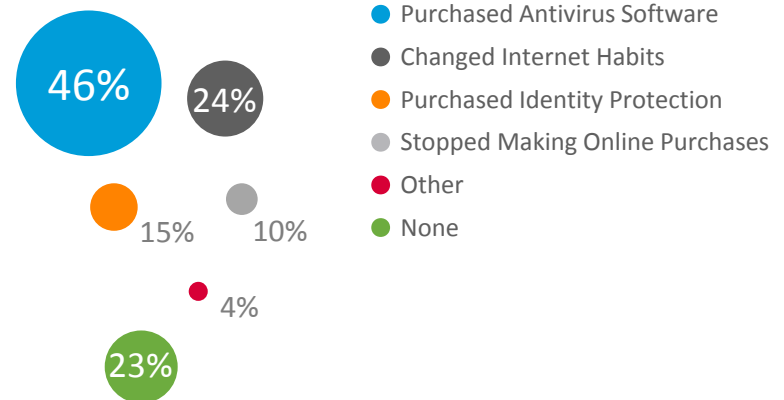
20% say they have been IMPACTED

86% are very/somewhat SCARED

Party Believed To Be Responsible For Stopping Stolen Credentials (Total)



Measures Taken To Avoid Stolen Credentials (Total)





**Economic Study**  
**Greg Rafert, Analysis Group**



# The Competitive Effects of ICANN's New gTLD Program

Phase I – Preliminary Results

Prepared for: ICANN

June 22, 2015

# Study Goals & Who We Are

- Study goals:
  - Understand competitive effects of ICANN's New gTLD Program on the marketplace for domain names.
  - Analyze competition in the past, present, and future.
- Our team includes:
  - **Catherine Tucker**, Mark Hyman Jr. Career Development Professor and Associate Professor of Management Science, Sloan School of Management, Massachusetts Institute of Technology.
  - **Greg Rafert**, Vice President, Analysis Group, a firm specialized in economics, health care analytics, and strategy consulting for Fortune 500 companies, global health care corporations, government agencies and law firms

# Assessing Competitive Effects

- Registrars and registries may compete on price and non-price factors.
- Fluctuations in domain name registrations across TLDs and registrars may illuminate:
  - The extent registration volumes depend on prices.
  - The potential impact of add-on features on registrations.
  - The impact of new gTLDs on legacy TLD registrations.

# Summary of Preliminary Results

- Main findings (based on limited data):
  - Minor price differentiation among most legacy TLDs relative to new gTLDs.
  - Legacy TLDs tend to have higher retail markups relative to new gTLDs.
  - Legacy TLD registration volumes do not appear to have fallen with the entry of new gTLDs.
  - Web hosting and email are the most frequently offered add-ons.
  - Registration costs are low relative to other website add-on costs.



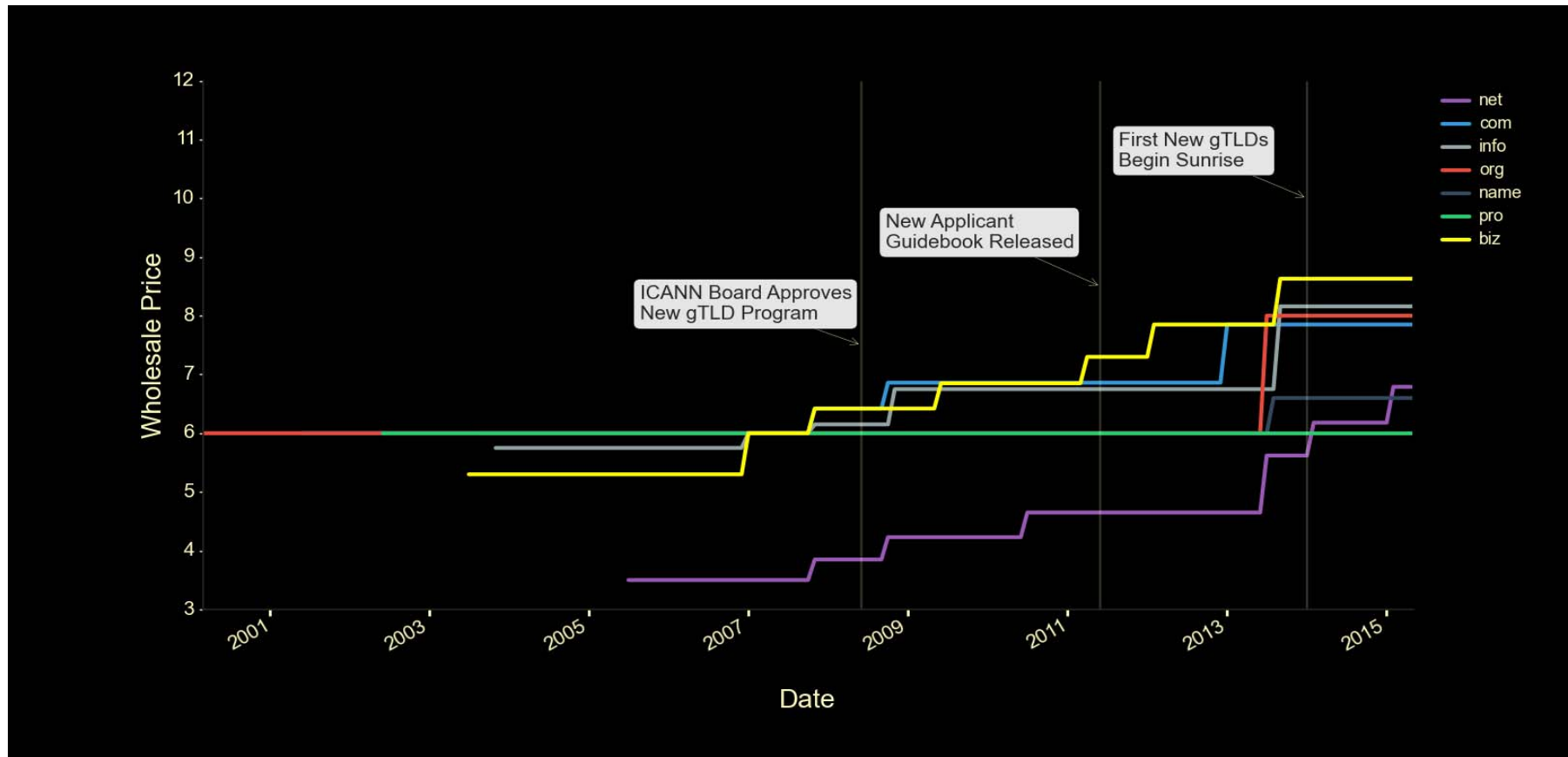
# Our Approach

- Collecting and analyzing data to evaluate competitive effects and customer responses:
  - Registry and registrar pricing.
  - Add-on offerings.
  - Domain registration volumes of new gTLDs.
- Data requests based on a sample of new gTLDs and ccTLDs, and all legacy TLDs:
  - Over 100 new gTLDs, and 15 ccTLDs, including some from each of ICANN's regions.
  - New gTLDs chosen based on current total registrations, recent registration activity, and expected customer overlap with high registration volume gTLDs.

# Data Collected to Date

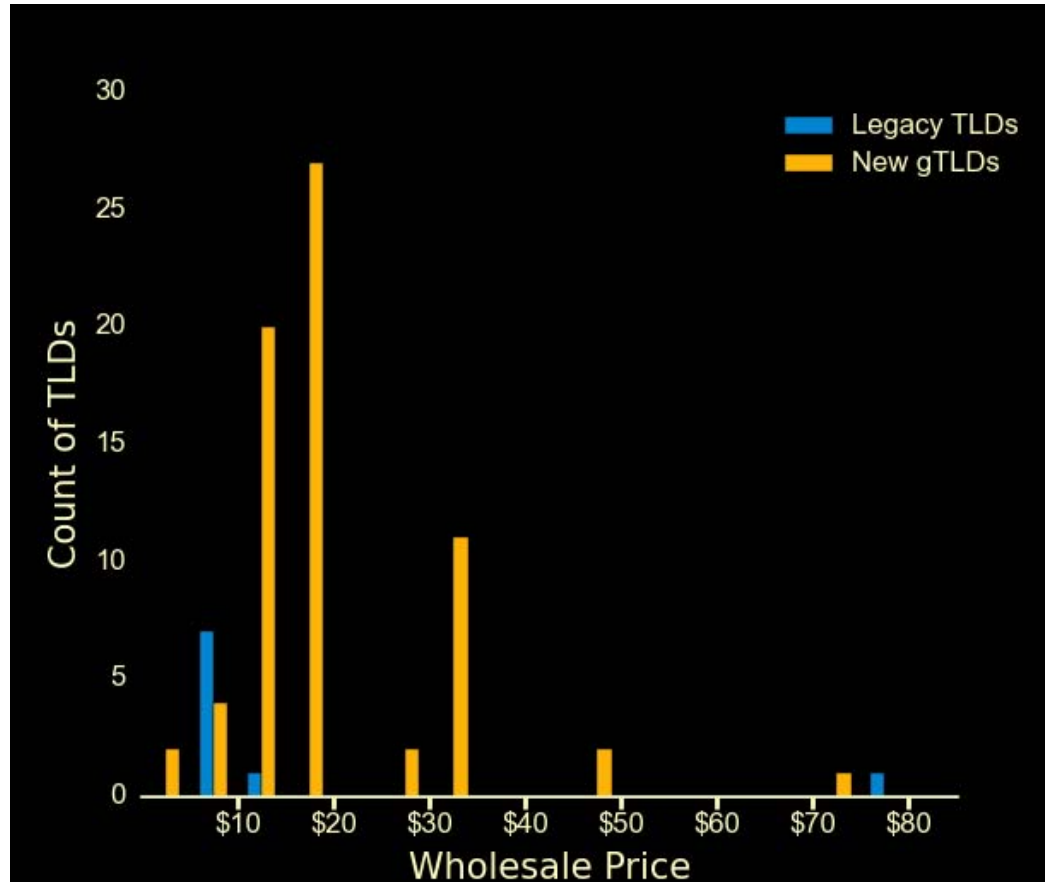
- Registry prices collected for over 80 new gTLDs (out of a target sample of over 100) from the operating registries.
- For legacy TLDs, historical registry price change updates obtained from ICANN. Historical monthly registration volumes obtained from ICANN for legacy and new gTLDs. (For ccTLDs, sufficient data were unavailable.)
- We collected 2015 list prices, and add-on prices and availability, from a sample of over 35 registrars.
- Historical registrar pricing information requested from 54 registrars.
  - Adequate responses received from only 6 of these registrars.
  - Historical analysis of registrar pricing is not currently included in our analyses.

# Minor wholesale price differentiation among most legacy TLDs over the last 15 years



**Notes:** [1] Wholesale prices are not adjusted for inflation.  
[2] Only legacy prices that are publicly available are shown.

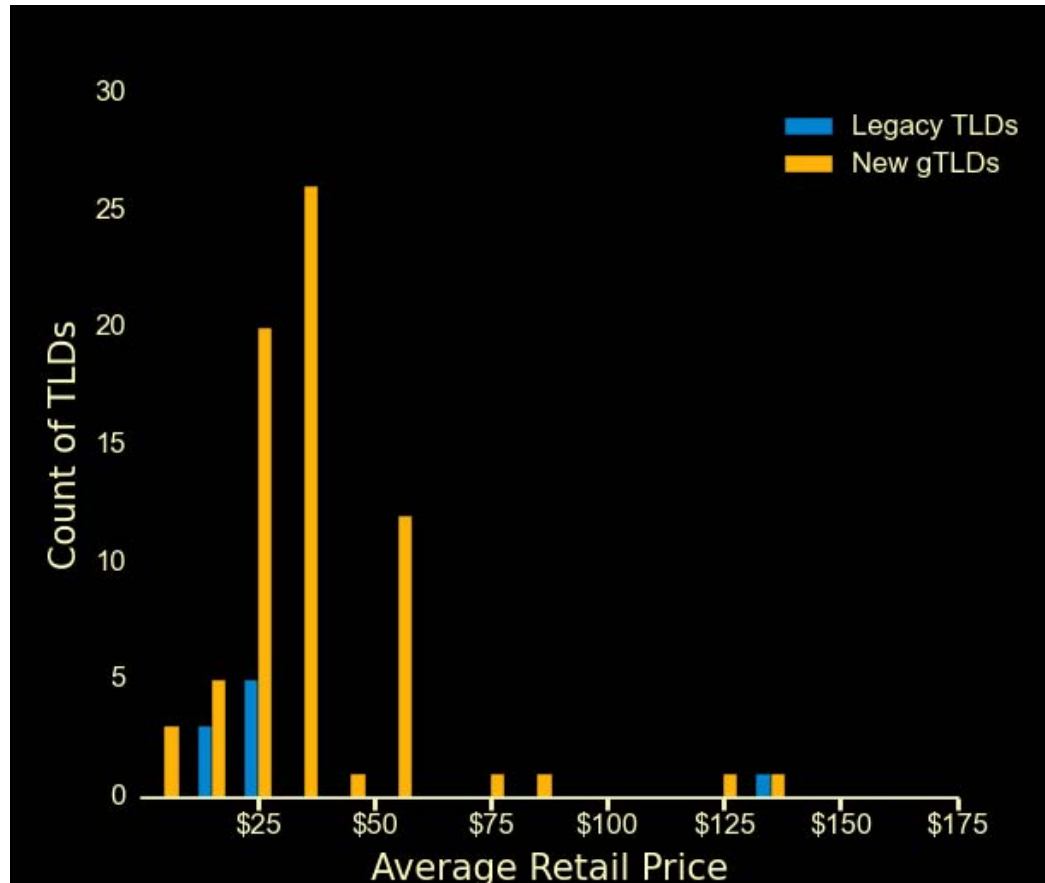
# Wholesale Prices (April 2015) Legacy TLDs vs. New gTLDs



**Note:** Wholesale prices were collected directly from the operating registry or provided by ICANN.

# Retail Prices (April 2015)

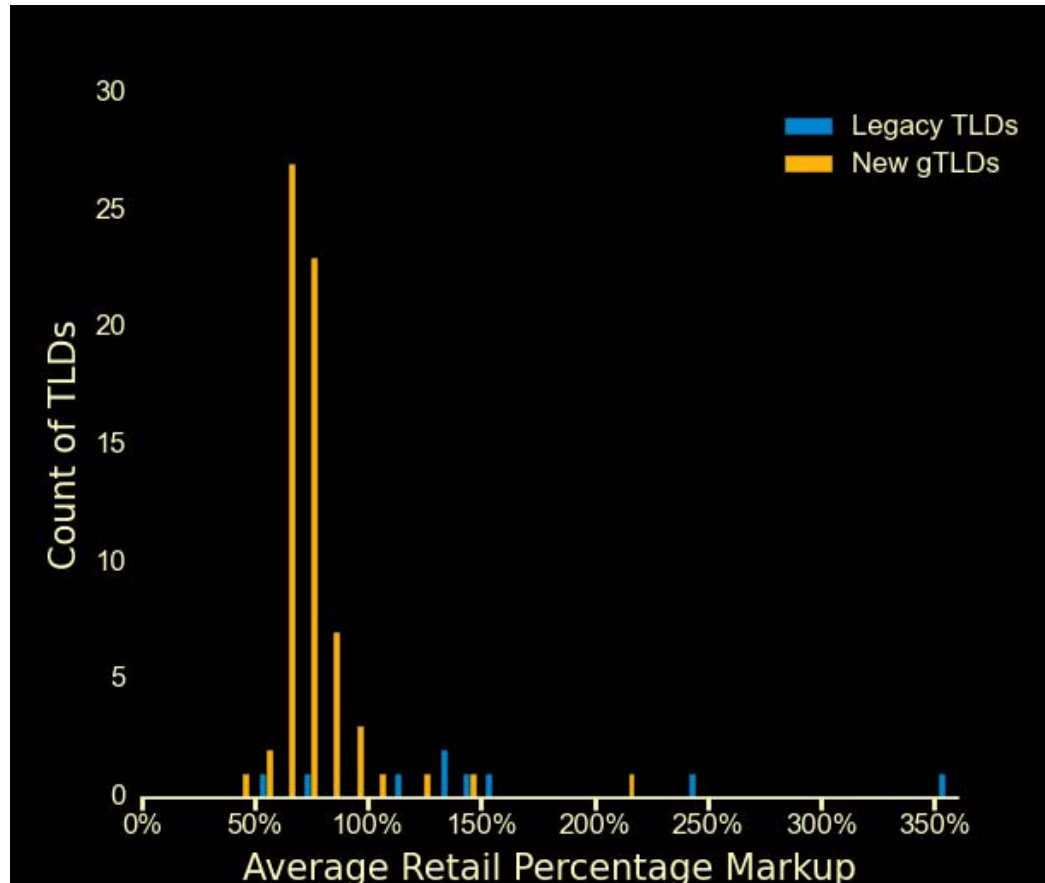
## Legacy TLDs vs. New gTLDs



**Notes:** [1] Retail prices were collected from a sample of 39 registrars' posted list prices.  
[2] Averages are taken across registrars in our sample that provided, on their website, list prices for a given TLD.



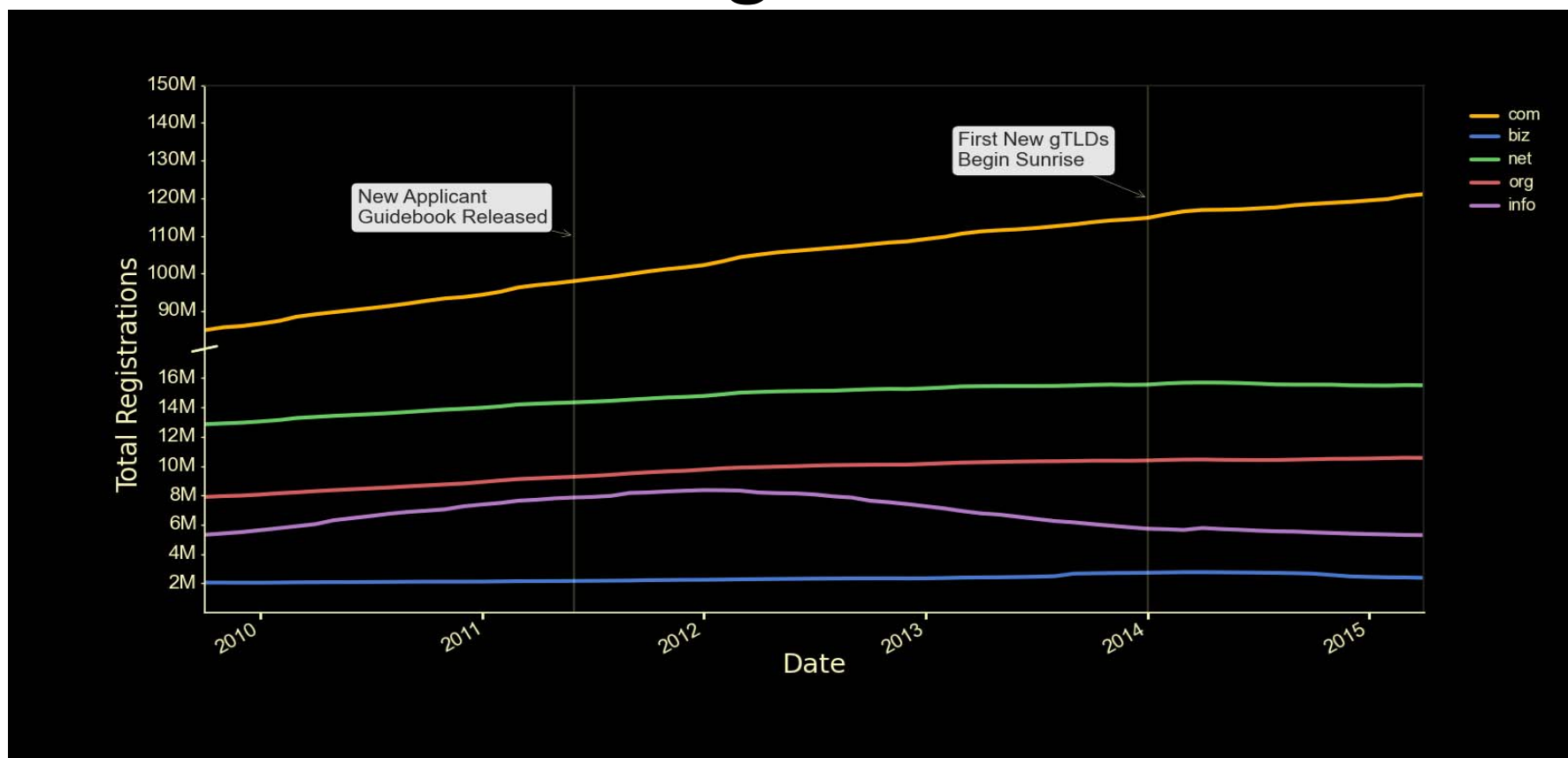
# Retail Markups (April 2015) Legacy TLDs vs. New gTLDs



**Notes:** [1] Markups are calculated as the percentage difference between the average retail price and the wholesale price.

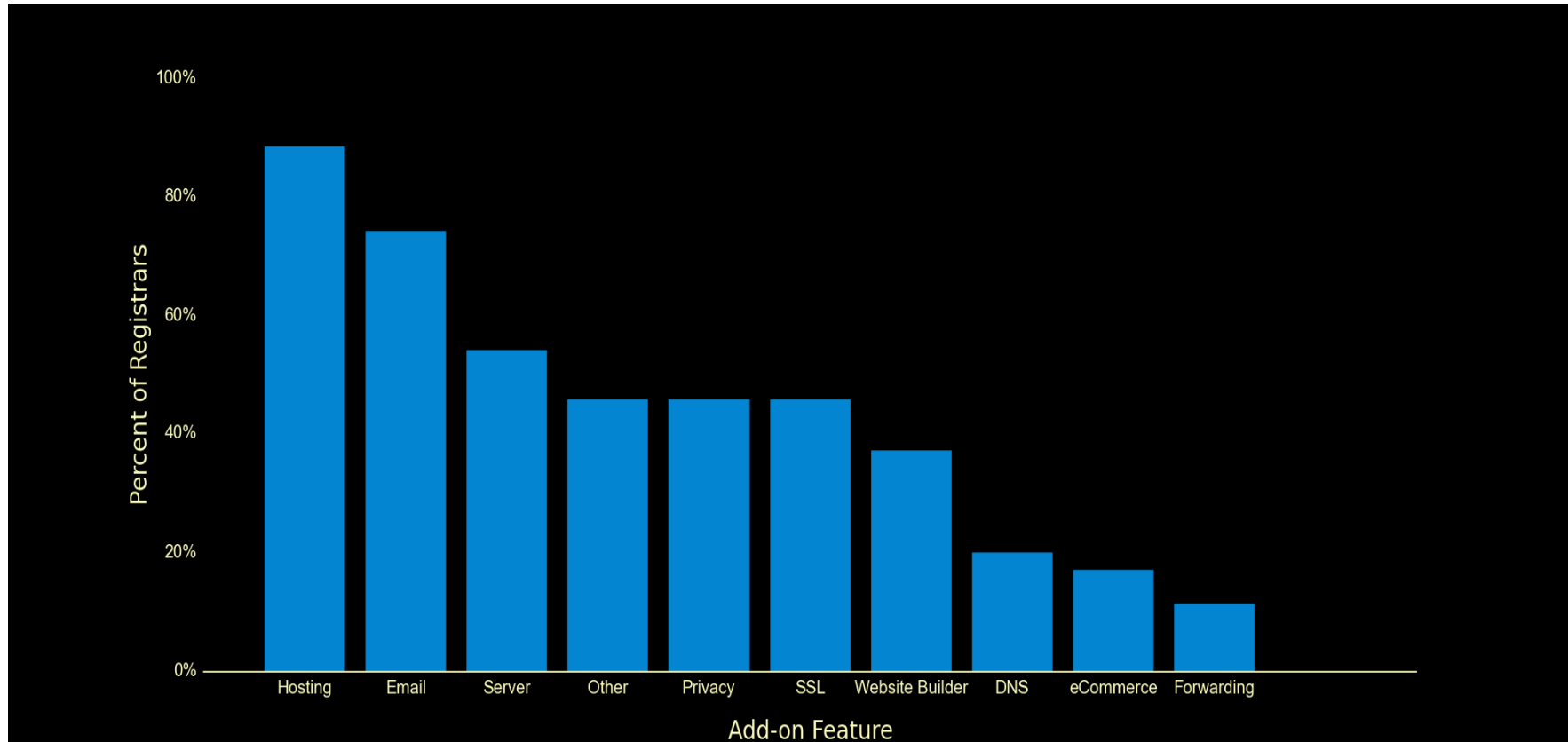
[2] The high markup for the legacy TLDs is .pro, which has special registration requirements.

# Little visible effect of new gTLDs on legacy TLD registrations



**Note:** Volume data are based on monthly transaction reports provided by ICANN.

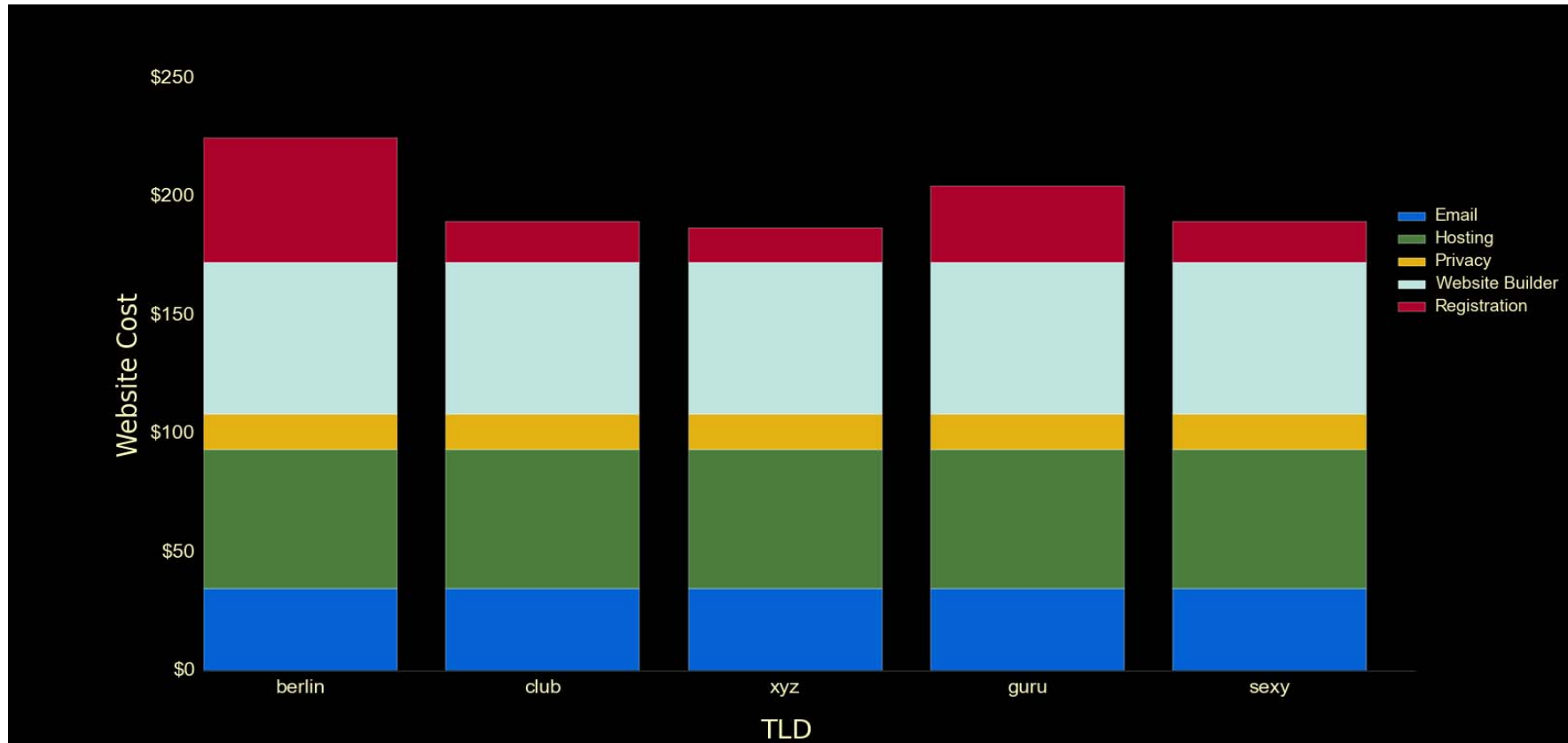
# Hosting and Email – Most available add-ons



**Notes:** [1] Data regarding availability were collected from 34 registrars' online price listings.

[2] "Other" includes features such as marketing, search engine optimization, mobile setup, and other registrar-specific features.

# Website Cost – Registration costs low relative to other website add-on costs (across 5 registrars)



- Notes:** [1] On average, the registrars account for 28% of the included TLDs' current registrations.  
[2] Data regarding add-on prices were collected from online price listings.

# Next Steps

## – Phase I:

- We will finalize results and provide a report summarizing our findings in August, 2015.
- We hope to obtain historical data from registrars. If these data become available in the coming weeks, we will provide an analysis of these data in our report.

## – Phase II

- In one year's time, we will revisit and update the results from Phase I.
- To update our results, we will send data requests to both registrars and registries, allowing us to track price and non-price changes.



## Contact

Catherine Tucker, Associate Professor of Management Science  
617-252-1499  
cetucker@mit.edu

Greg Rafert, Vice President  
720-648-9889  
greg.rafert@analyisgroup.com

# Program Implementation Reviews

## Trang Nguyen, ICANN

# Background

Section 9.3 of the Affirmation of Commitments states:

*“If and when new gTLDs...have been in operation for one year, ICANN will organize a review that will examine the extent to which the introduction or expansion of gTLDs has promoted competition, consumer trust and consumer choice, as well as effectiveness of (a) the application and evaluation process, and (b) safeguards put in place to mitigate issues involved in the introduction or expansion.”*

# About the Program Implementation Review

## What It Is

Self-assessments by ICANN staff to examine effectiveness and efficiency of ICANN's implementation of the Program.

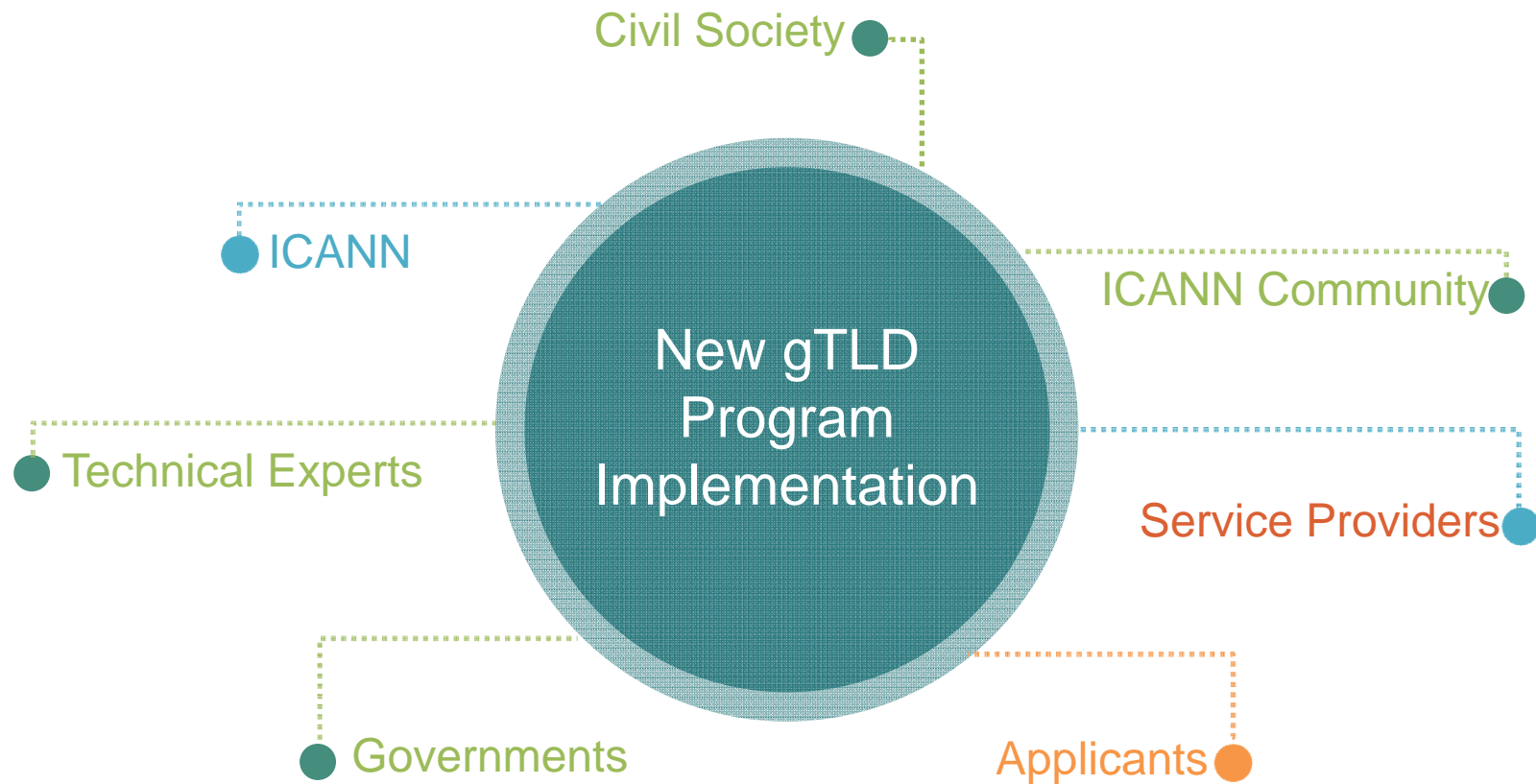
Reviews will be provided to CCT Review Team to inform its work and used by ICANN in developing future procedures.

VS

## What It Is Not

Reviews of the community-developed Applicant Guidebook, or of the GNSO policies on the introduction of New gTLDs.

# Broad Participation





# Review Areas

**Application  
Processing**

**Application  
Evaluation**

**Objection/  
Dispute  
Resolution**

**Contention  
Resolution**

**Contracting &  
Transition to  
Delegation**

**Applicant  
Support  
Program**

**Continuing  
Operations  
Instrument**

**Program  
Operations**

# Review Dimensions

1

## Efficiency

To what extent resources (time, effort, cost) were well used for the intended purpose.

4

## Predictability

To what extent the Program process/procedures/timelines provided predictability.

2

## Effectiveness

To what degree the process was successful in producing desired results/achieving objectives.

5

## Security and Stability

To what extent the process/procedure/framework supported the security and stability of the DNS.

3

## Fairness

To what extent decision-making was consistent, objective and adhered to documented policies and procedures.

6

## Alignment to Policy and Implementation Guidelines

To what extent the Program execution adhered to GNSO policy recommendations and AGB.

# Progress Update

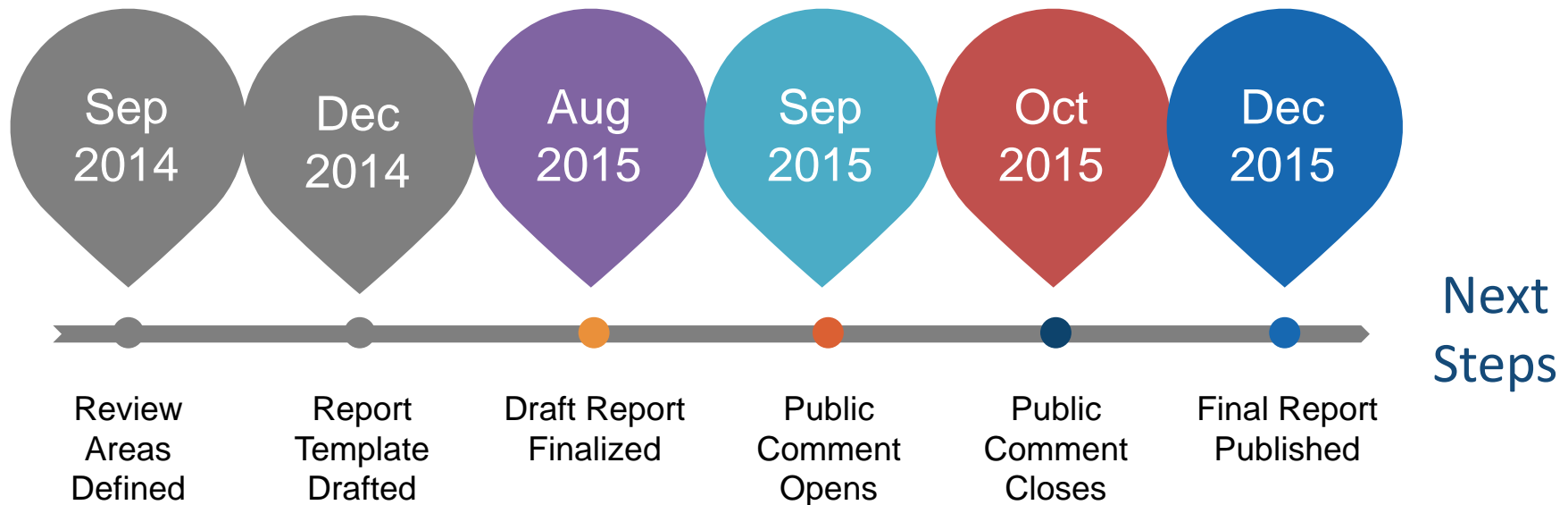
## Completed

- Defined review dimensions (6)
- Defined review topics (26)
- Created report template
- Identified relevant guidance for the 26 topics
- Completed draft of 26 topics
- Identified stats for the 26 topics
- Drafted glossary
- Drafted foreword

## In Progress

- Internal reviews
- Check internal report references
- Format report
- Update final stats
- Write executive summary

# Reviews Timeline



## Updates

Publication date of draft report for comments extended from June 2015 to September 2015 due to expansion of scope of report to incorporate two new review areas, Applicant Support and Continued Operations Instrument.





# Rights Protection Mechanisms Review Karen Lentz, ICANN

# Goals



## Capture user experience with new RPMs

Consideration of how RPMs affect stakeholders in DNS context



## Outline the range of issues for discussion

Helping inform additional work in community



## Identify those issues with most impact

Supporting prioritization on future work



# Draft RPM Review Report

Public comment period: <https://www.icann.org/public-comments/rpm-review-2015-02-02-en>

- Report updates in process based on comment

## Supports:



# Key Areas of Comment

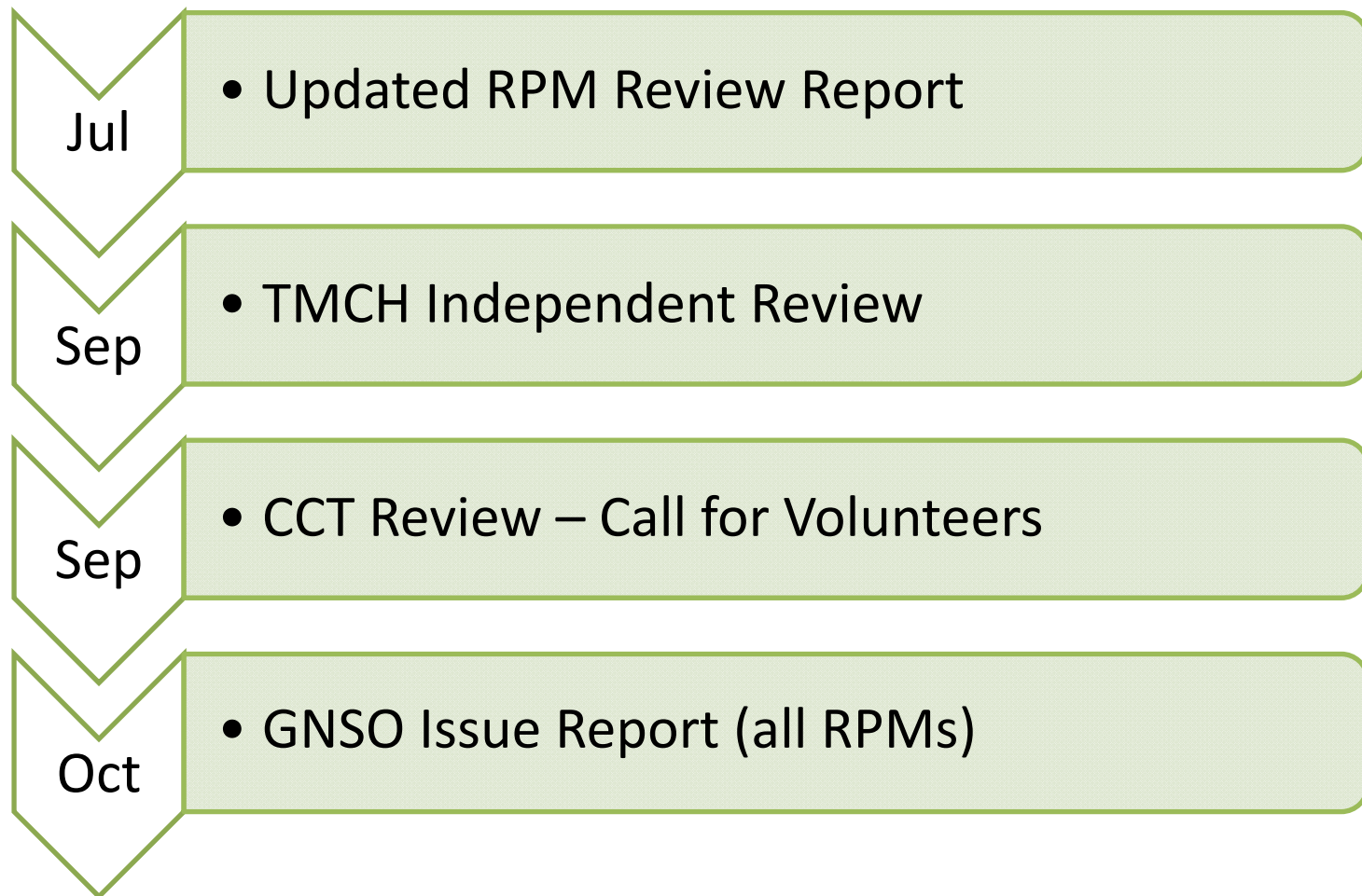
- “Premium pricing”
  - Concern about higher Sunrise registration fees for some trademark names
- Reserved names
  - Concern that reserve lists potentially allow registries to circumvent Sunrise requirements
- Duration of Claims service
  - Interest in extending the service
- URS remedy
  - Interest in transfer in addition to suspension option
- Blocking services
  - Described as useful and cost effective, with some concerns on rules



Report of public comments: <https://www.icann.org/public-comments/rpm-review-2015-02-02-en>

# What's Next?

## Q3 2015:





# **CCT Review**

## **Margie Milam, ICANN**

# The Affirmation of Commitments

**Scope:** Review examines the extent to which new gTLDs have promoted **competition, consumer trust and consumer choice**, as well as effectiveness of

- (a) the application and evaluation process, and
- (b) safeguards put in place to mitigate issues involved in the introduction or expansion

**Recurring Reviews:** 1 yr after New gTLDs in operation, 2 years later, and then at least every 4 yrs

**Outcome:** Recs sent to Board, which acts within 6 mo. Implementation or if necessary, GNSO PDP follows Board action

**Process Improvements:** Public comment on streamlined procedures open until 2 July. See: <https://www.icann.org/public-comments/proposed-aoc-org-reviews-process-2015-05-15-en>



# Composition of Review Team - AoC

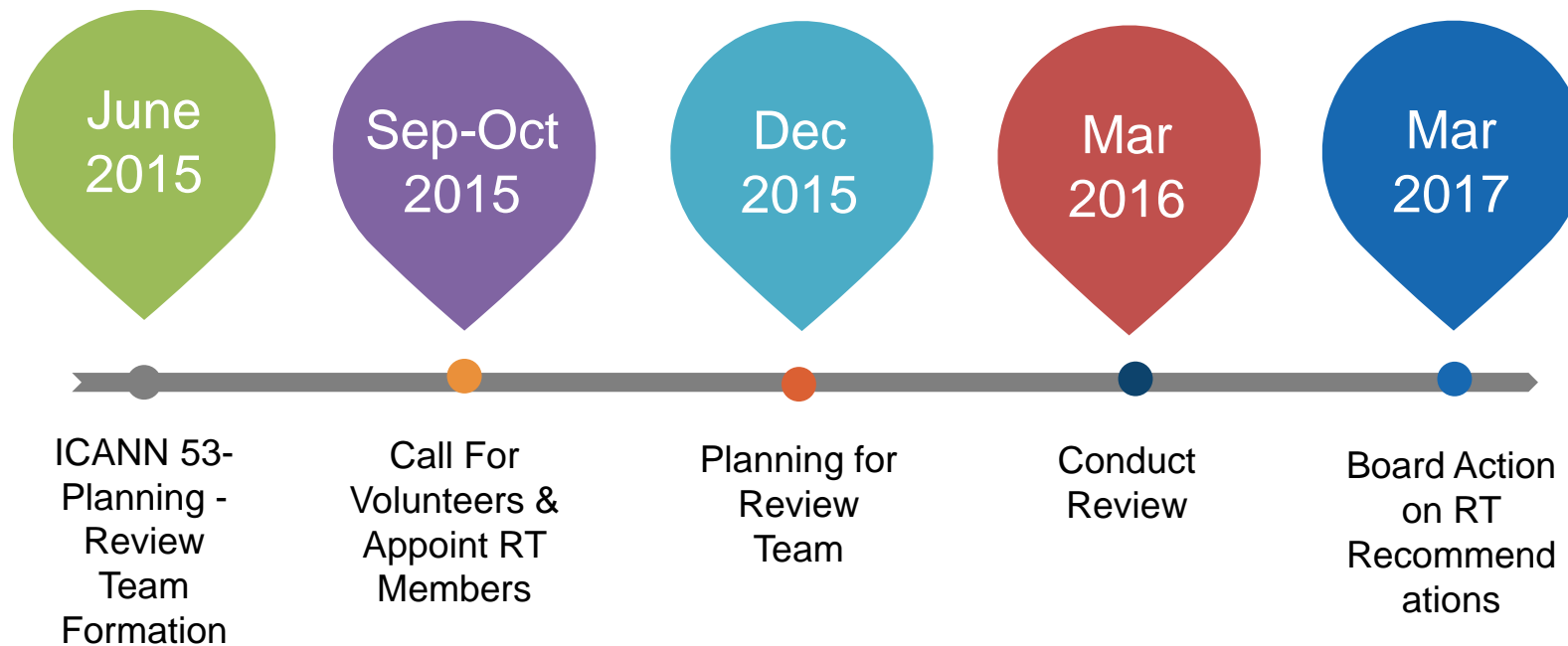
The reviews will be performed by volunteer community members ... and will include the following (or their designated nominees):

- GAC Chair
- ICANN CEO
- Relevant SO/ACs representatives
- Independent Experts

The RT Composition will be agreed jointly by the GAC Chair (in consultation with GAC members) and the ICANN CEO



# CCT Review Timeline & Milestones



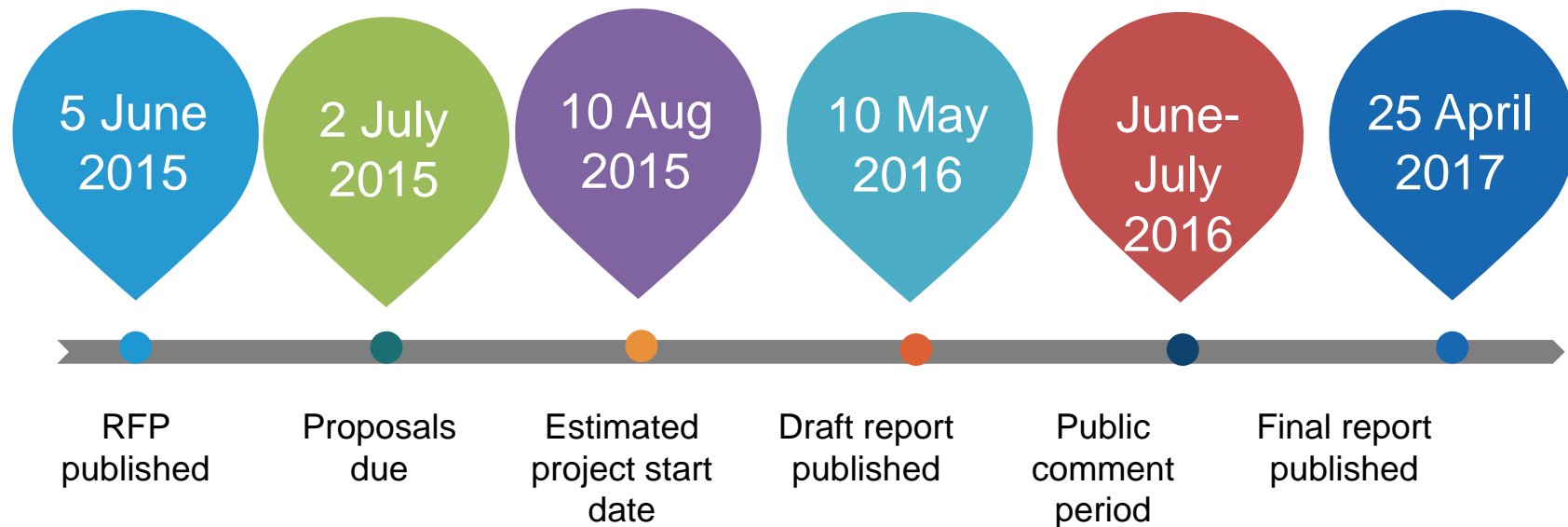
**Estimated Timeline for Competition, Consumer Trust and Consumer Choice Review Team Under the AoC**



# Root Stability Study

## David Conrad, ICANN

# Root Stability Review



## Goals and expectations

Using data from root server operators, as well as historically available data, the study should provide an understanding of the impact of adding new gTLDs to the root. ICANN anticipates public comment received after publication of the first draft will inform the context and content of the final study and report.



# Supporting Organizations and Advisory Committees



# **GNSO Discussion Group**

## **Bret Fausett, Chair**



# Agenda

1

Background on  
origins of the  
Discussion Group  
(DG)

2

Current status and  
review of DG  
Deliverables

3

Next steps and  
estimated  
timelines



# Background



## Background

With more than 650 new gTLDs delegated, the community felt that analysis and discussion of the 2012 round of the New gTLD Program should begin.



## GNSO Initiates Discussion Group

GNSO Council formed the Discussion Group in June 2014 to discuss experiences gained from the 2012 round and identify subjects for future issue report(s) that might lead to changes or adjustments for subsequent application procedures.



## Broad participation

Community members from a broad spectrum of SO/AC/SG/Cs contributed to identify issues that they or their constituents experienced.

# Current Status

## Deliberations of the DG

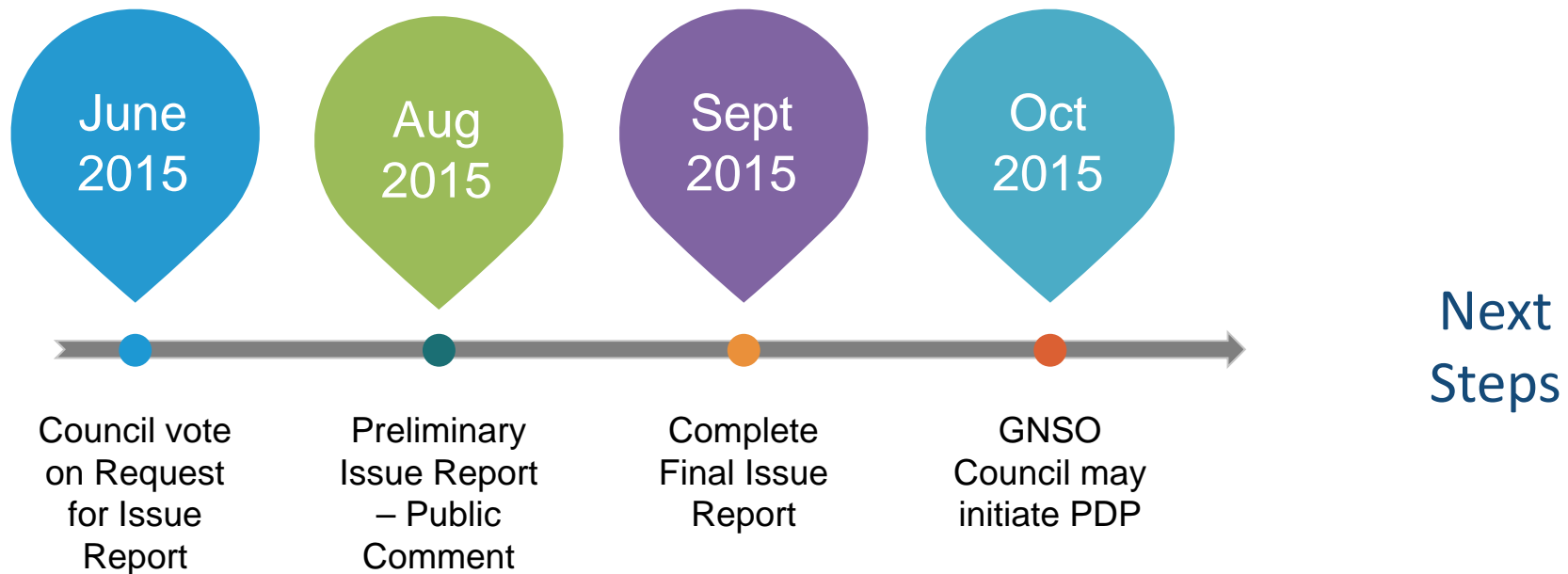
- The DG held calls and met face-to-face to identify issues they encountered, organizing them logically in a mind map
- Associated the issues with principle, recommendation or implementation guidance from 2007 New gTLD Final Report
  - Help understand how issue is best resolved (e.g., amend/add/delete policy, new policy, etc.)
- Provided subjects and provisional groupings for possible Issue Report/PDP



## Deliverables

- Drafted an executive summary, providing brief background and current program status, along with a narrative of the group's deliberations
- Prepared a matrix which assigns identified issues to the original GNSO recommendations, where possible
- Prepared a draft charter which may be included and used with a possible Issue Report / PDP Working Group

# Next Steps



## To Summarize

The DG has provided a recommended set of issues/subjects for further analysis in a possible Issue Report/PDP. There are a number of steps remaining before a PDP could be initiated.

# More Information

- ◉ Summary of DG Activities: <http://gnso.icann.org/en/group-activities/active/non-pdp-new-gtld>
- ◉ DG Wiki Space: <https://community.icann.org/x/OrXhAg>



# **GAC WG: Protection of Geographic Names in New gTLDs**

## **Nicolas Caballero**

# GAC Durban Communique - July 2013: Refine the Rules for Next gTLD Round

## Objectives

- Lower uncertainty for the applicant, for countries, regions and communities.
- Prevent/avoid misuse of names which are relevant for communities, regions, countries, etc.
- Lower the conflicts once the results of new round of new GTLDs will be announced.
- Give background information which can be useful to ICANN in the definition of the next round of new gTLDs rules.



## WG Working on New Background Document Focused on:

- Possible actions at the national/regional level to protect geographic names
- Possible text for new AGB or other future document
- Possible Best Practice Guidelines
- Analysis of legal concerns raised in public comments
- Analysis of community concerns: should geographic names or community-related names be “Community applications” in new rounds of new gTLDs?
- Analysis of the “public interest” concept

## Some Ideas for Best Practice Guidelines

- Promote an early contact between applicant and relevant authorities and communities related with the geographic or community name.
- Enhance outreach efforts for the next new gTLD round.
- Establish clear steps/way forward for both the applicants and government in reaching consensus in relation with the applied gTLD.
- Establish a clear process for governments to raise their concerns when their territories' - regions, cities or other – relevant names are used in the next new gTLD round.
- Establish rules about what's next if there is no consensus reached between both parties.

# Next Steps

- ICANN is where the new gTLDs process is happening.
- There were problems.
- No changes to the rules = same problems in the future.
- WG will present during this meeting a new version of the background document that includes information from community comments: legal concerns, community concerns and a revision of the “public interest” concept.
- WG meets during ICANN meetings and through conference calls between F2F meetings.



**Tracy Hackshaw / Alice Munyua**  
**GAC Working Group on Underserved**  
**Regions**

# ICANN53 – Buenos Aires

## New gTLD Program Reviews Session

### **GAC Under-Served Regions Working Group**

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# Objectives

The focus of this GAC WG is on regions that are currently under-served by the DNS industry and on least developed economies and small island developing states.

It's objectives are to develop a range of support, advice and assistance mechanisms for under-served regions aimed at:

1. Increasing the number and participation of GAC members from least developed economies and small island developing states; and
  2. Increase the knowledge, understanding and capacity of GAC representatives from current GAC member nations who are defined as 'under-served'. This will encourage them to engage more deeply with ICANN policy processes and for the following outcomes:
    - a) Increased participation from under-served regions during future new gTLD rounds; and
    - b) Growth and development in the domain name industry in the currently under-served regions.
-



# Under-Served Region

An Under-Served Region is defined as:

A region that does not have a well developed DNS and/or associated industry or economy; and/or

A Region that has low awareness within its government of ICANN, ICANN's role and functions and policy processes and the way that these policies affect it.

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# Work Plan

1. Facilitation of a ccTLD Survey among GAC members.
  2. Engagement with the gTLD Review team to share the challenges and lessons learned by Under-Served Regions
  3. Engagement with the Auction Fees Working Group and the development of a proposal on how Auction fees might be purposed to benefit Under-Served Regions
  4. Capacity building activity to result in increased numbers of GAC members from under-served regions and increased knowledge and skills for those who are already GAC members
-



**Heather Forrest  
Annebeth Lange  
Co-Chairs, Cross-Community Working Group  
on the Use of Country & Territory Names**



**Jim Galvin**

**Chair, SSAC New gTLD Issues Work  
Party**



# SSAC New gTLD Program Review

- ⌘ Review of all recommendations since SAC045 (November 2010)
  - ⌘ Is there new information to add to our findings the community should consider?
  - ⌘ Root scaling, name collisions, reserved names – what have we learned about how things are working?
  
- ⌘ Are there any new recommendations?
  
- ⌘ Timings – are there any constraints that should affect the timing of the next round?



# Q&A

# Engage with ICANN



## Thank You and Questions

Reach us at:

Email: [engagement@icann.org](mailto:engagement@icann.org)

Website: [icann.org](http://icann.org)



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