

# Gamma Communications plc

## Capital Markets Day

Market Opportunity and  
Product Portfolio

10<sup>th</sup> June 2021





# Agenda

Capital Markets Day

10<sup>th</sup> June 2021

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**01.** **Introduction**  
Andrew Taylor

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**02.** **2023 Strategy and the Growing Opportunity**  
Andy Morris

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**03.** **Market Segmentation and Product Portfolio**  
Chris Wade

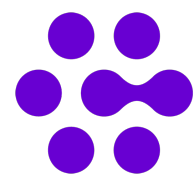
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**04.** **Wrap-up**  
Andrew Taylor

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**05.** **Q&A**  
Andrew Belshaw & Andrew Taylor

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# Objectives for the day

- Reconfirm **Gamma's 2023 growth strategy and execution progress**
- Provide an update on the **market opportunity**
- Provide an update on Gamma's **product strategy** and explain how Gamma's **product portfolio fits with the market opportunity**
- Demonstrate some of Gamma's **new UCaaS and CCaaS products**
- **Meet the Gamma team** and provide an opportunity for **Q&A**

# Gamma Senior Leadership Team

✓  **CEO**  
**Andrew Taylor**

✓  **Chief Financial Officer**  
**Andrew Belshaw**

✓  **Chief Marketing & Product Officer**  
**Chris Wade**

 **Managing Director UK Channel**  
**Daryl Pile**

 **Germany**  
**Achim Hager**

✓  **Chief Strategy & Operations Officer**  
**Andy Morris**

 **Chief Technical Officer**  
**Phil Stubbs**

 **Managing Director UK Direct**  
**David Macfarlane**

 **Benelux**  
**Gerben Wijbenga**

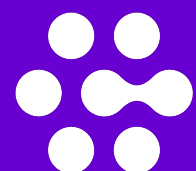
 **Commercial Director & Company Secretary**  
**Malcolm Goddard**

 **Group Operations Director**  
**John Murphy**

 **Spain**  
**Xavi Casajoana**

 **Interim Chief People Officer**  
**Chris Bradford**

✓ Present today



# A quick snapshot of our business

- A **developer and provider** of UCaaS, CCaaS, voice, data and mobile communication services
- Focused on the **UK and European B2B** communications market
- **Market leadership** in two major growth markets in the UK: SIP and Cloud Telephony
- Addressing **multiple** indirect, direct and digital **channels**, driving growth opportunities **across all business market segments**



£393m Revenue  
£79m EBITDA\*



+93% ARR  
no debt  
Excellent cash generation



+1,500 employees  
located in mainly the UK,  
Netherlands, Spain, Germany  
& Hungary



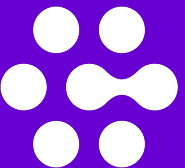
+0.75m paying cloud  
comms business seats



63% of sales UK Channel  
25% of sales UK Direct  
12% of sales Europe



Recently acquired Mission  
Labs, opening up multiple  
product and business  
segment opportunities



CCaaS: Contact Centre as a Service UCaaS: Unified Communications as a Service

\* FY 2020 results

# Market & Customer Drivers – **positive growth trends**

- **UCaaS** is a key enabler for flexible and remote working across all business types and sizes



Rapid increase in awareness and demand of Unified Communications

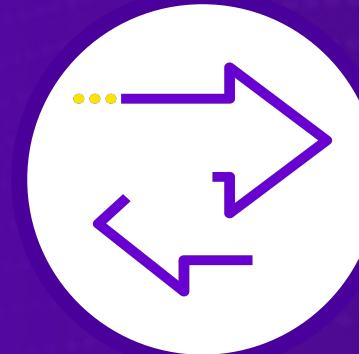


Increased adoption of remote and flexible working across all business sectors, particularly Enterprise



Companies accelerating their digital transformations across all aspects of their business

- **CCaaS** enables and optimises the delivery of remote omni-channel sales and customer service



Reinforcing the need for secure, reliable, high-speed fixed and wireless broadband access infrastructure



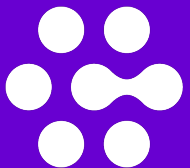
Short-term economic headwinds, compensated by a long-term shift in demand for cloud services



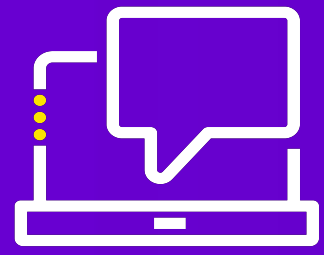
Overall long-term growth prospects are positive across all geographies and business sectors

- A **Digital approach** is at the heart of driving sales, marketing, and overall customer fulfilment – while enabling speed and efficiency

- COVID-19 has driven structural market changes which will lead to an acceleration in the adoption of cloud communication services.
- These changes have reinforced Gamma’s long-term UCaaS strategy across all business segments and geographies.

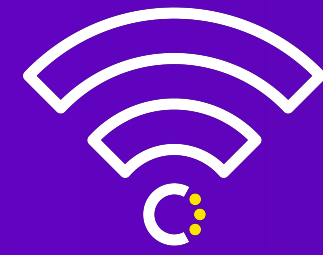


# Core Gamma Foundations – **Why we win?**



## Product

Driving innovation through a **strong and complete end-to-end product portfolio**, addressing multiple business segments, geographies and channels



## Network Quality

**Backed up by strong network foundations** - carrier grade, high availability and rock-solid end user performance



## Digital Platforms

**Providing all channels with the digital edge** to be successful and grow their businesses:  
Sales & Care Automation (Gamma Portal and Hub)  
Training (Academy)  
Marketing enablement (Accelerate)



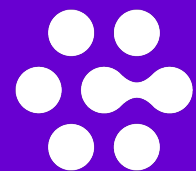
## Commercial Agility

**Providing our partners leverage and flexibility** - driving incentives and not causing price erosion - and **selling on value** and not price



## People

**Human aspect of our customer engagement** through channel and direct - long standing, consistency, built on trust and a balance of strong business ethics - Culture, skills and delivering against our mutual promises





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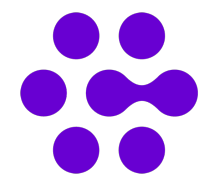
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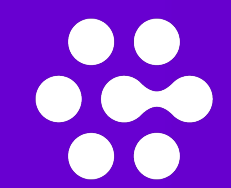
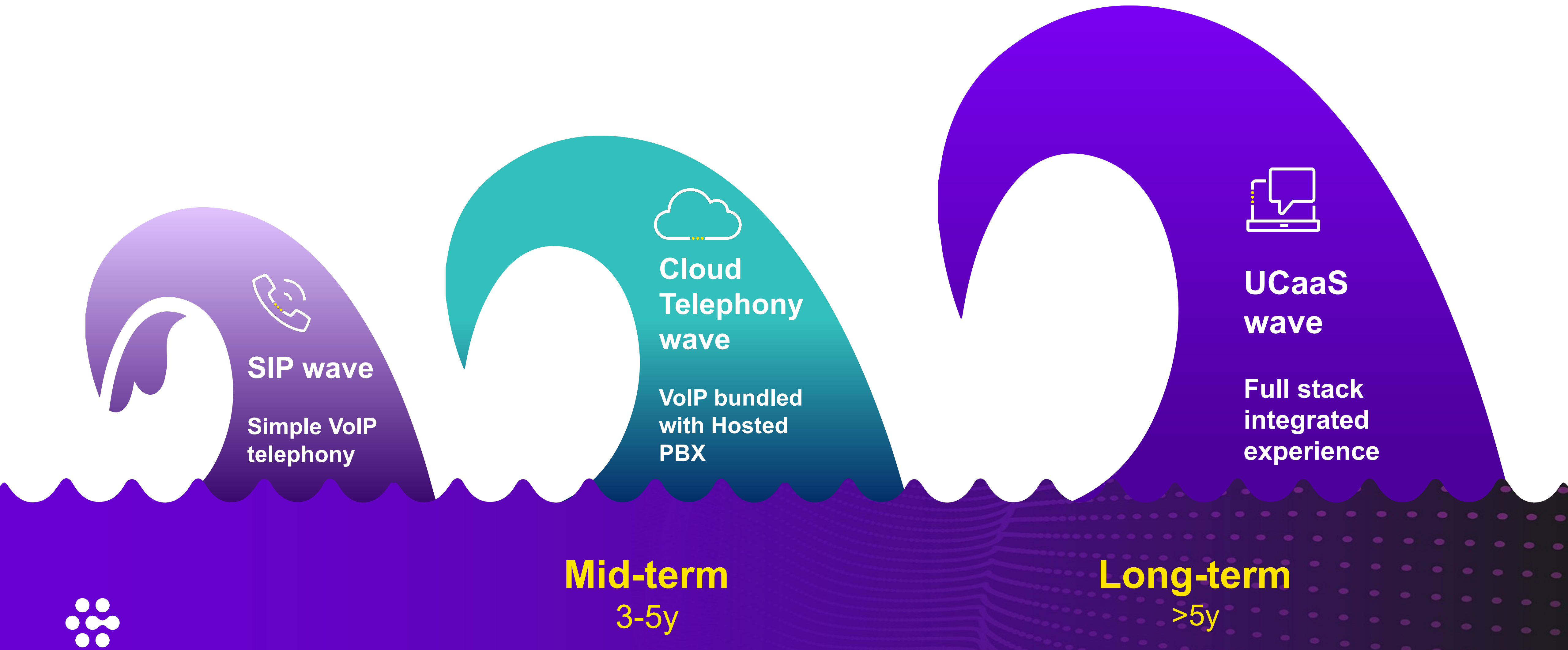
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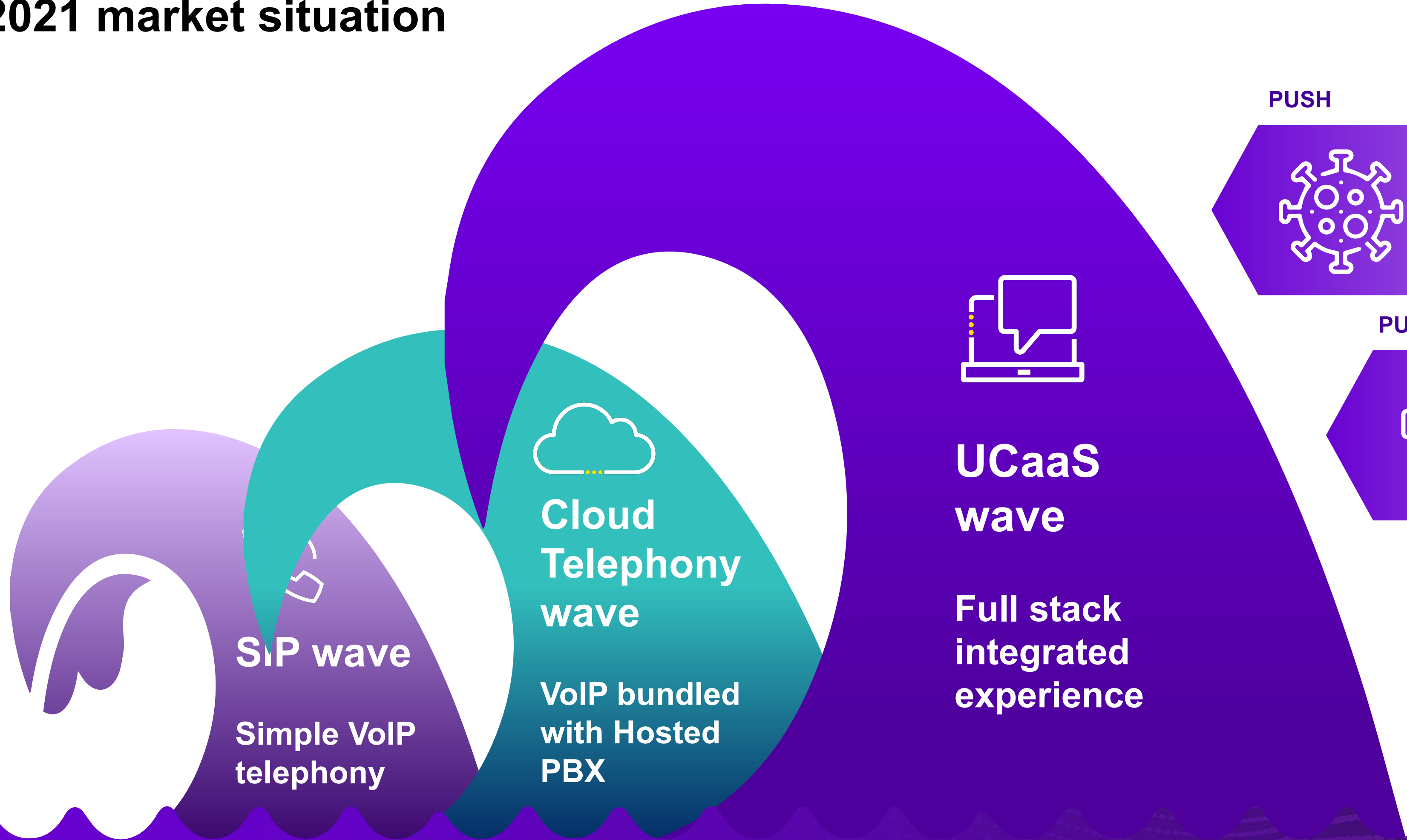
# Our 2019 view of the market evolution

2019



# 2021 market situation

Today



PUSH

COVID HEALTH MEASURES

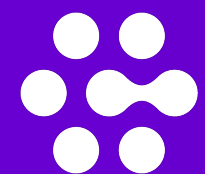
PUSH

USERS AND BUYERS

PUSH

TELECOM ICT

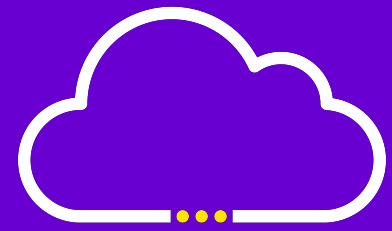
NOW



# In 2019 we unveiled our 2023 strategy plan which included four key strategic priorities

2019

## 2023 key strategic priorities



Evolve our strong cloud telephony position into the UCaaS market



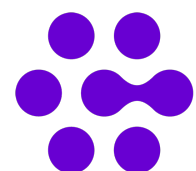
Build on our Fixed and Mobile Telecom strength to differentiate our proposition from pure OTT's



Expand to Europe to gain continued growth and scale



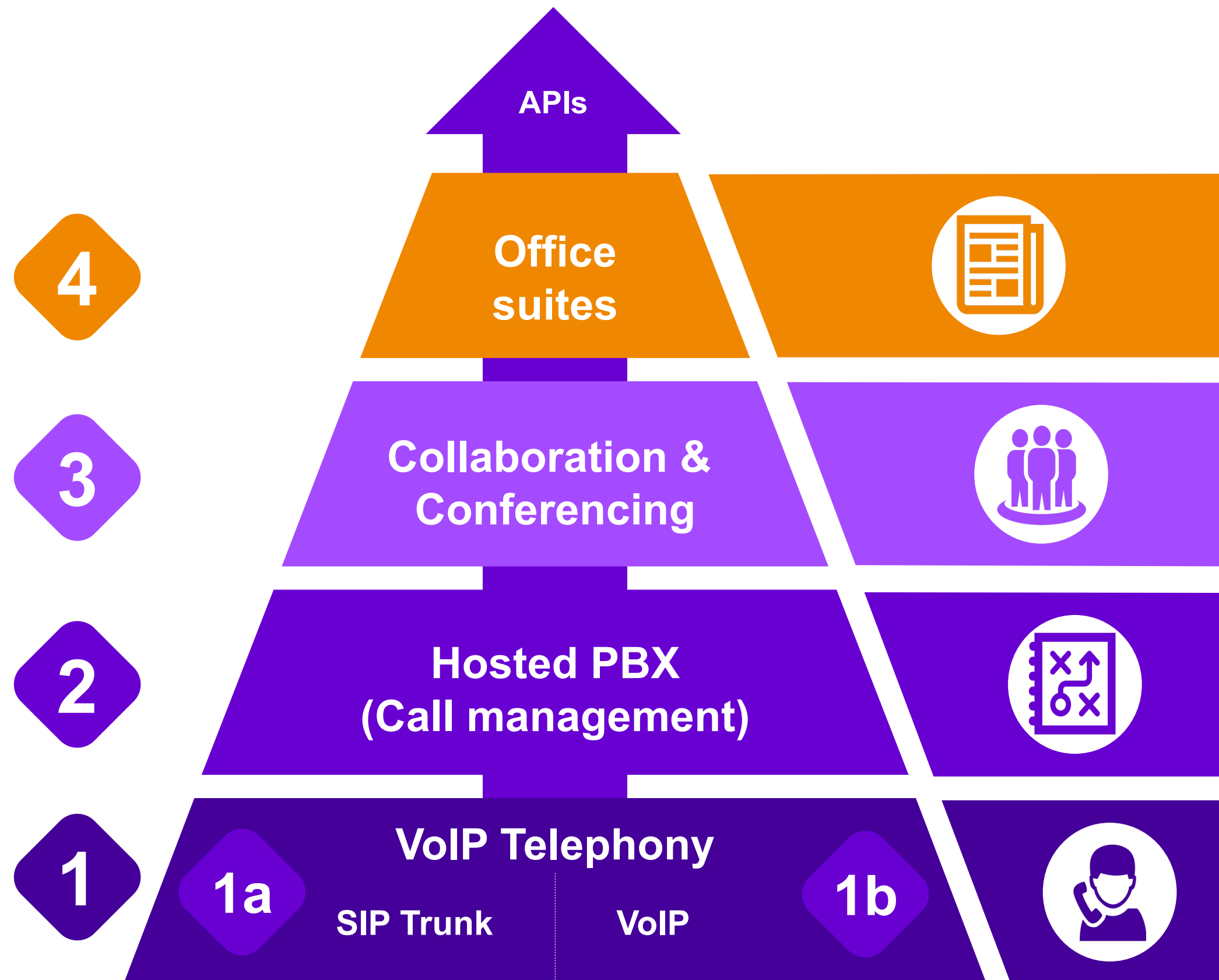
Continue to build on our digital capabilities to assure agility and sustain competitiveness



# We believed UCaaS market development would create new adjacent market opportunities for Gamma across the technology stack

2019

## UCaaS technology stack



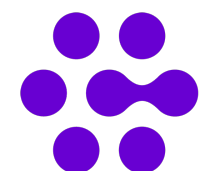
## UCaaS components

- Word processing, Spreadsheets, Slide presentations
- Collaborative creation and edition
- Email
- Calendar

- Real time voice and video conferencing, Screen-sharing, Whiteboard
- Instant Messaging, File transfer, Presence
- Employee networking and wikis, Task management
- Workspace

- IVR
- Extensions, queues, greetings
- Hunt groups
- Call recording, advanced voicemail

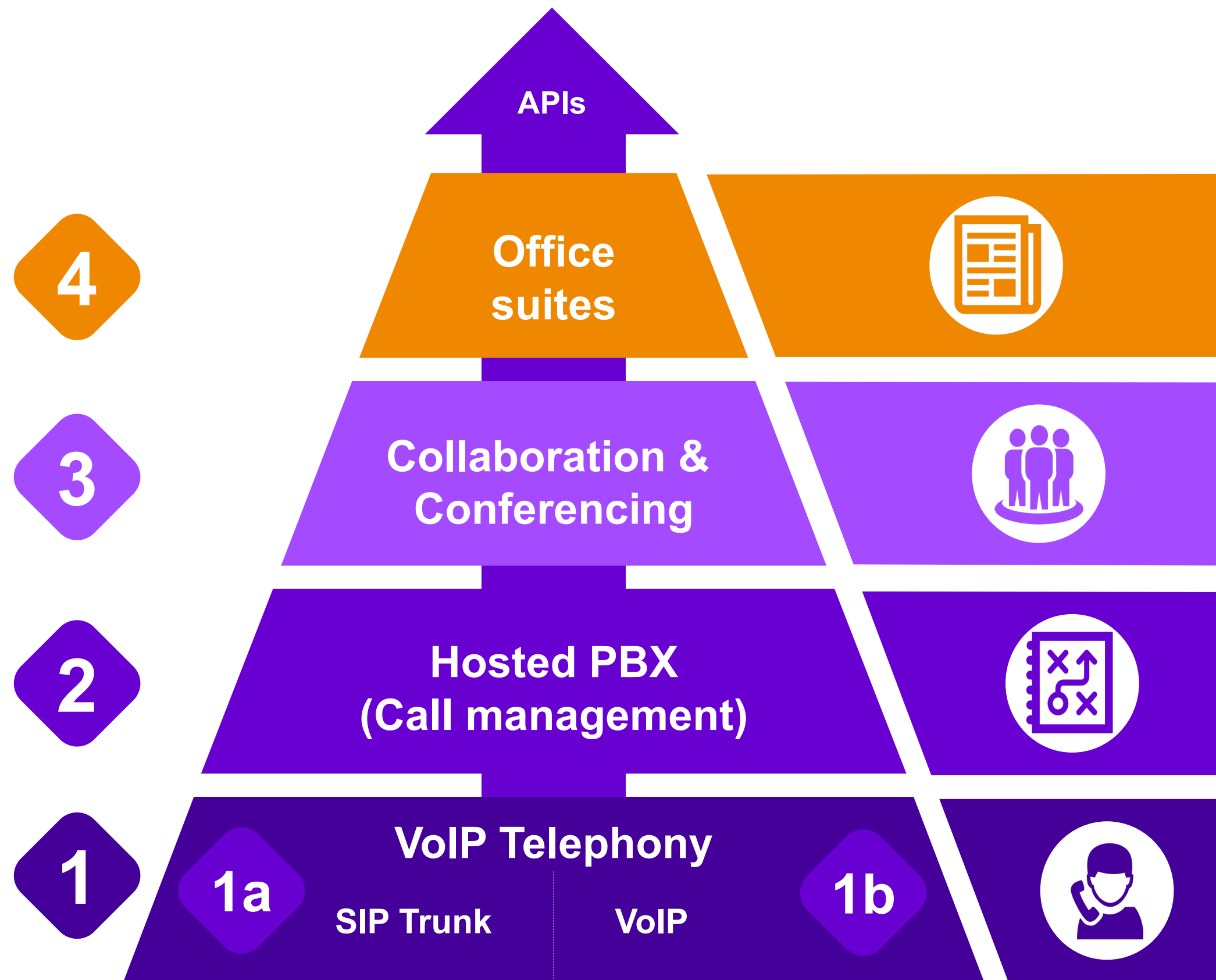
- High quality in-company calls
- PSTN calls channeled through SIP trunk or a VoIP seat



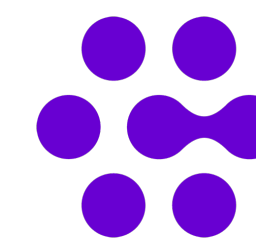
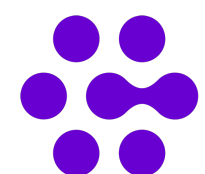
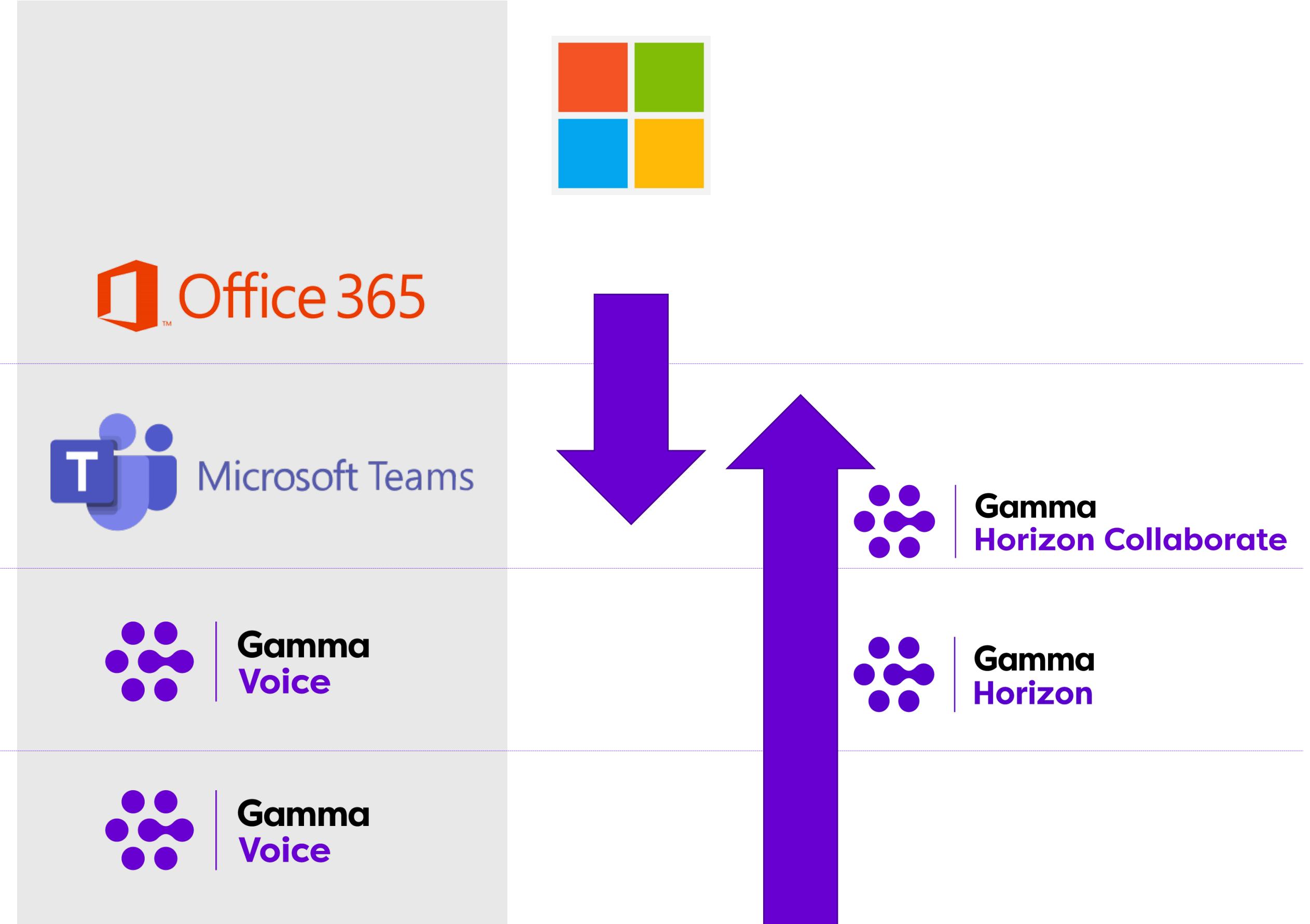
Source: Outvise analysis  
CAGR 2018-2023

# An example of this opportunity, Microsoft Teams requires the Gamma Voice product (SIP and/or Horizon) to offer a full UCaaS solution

## UCaaS technology stack

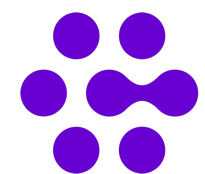
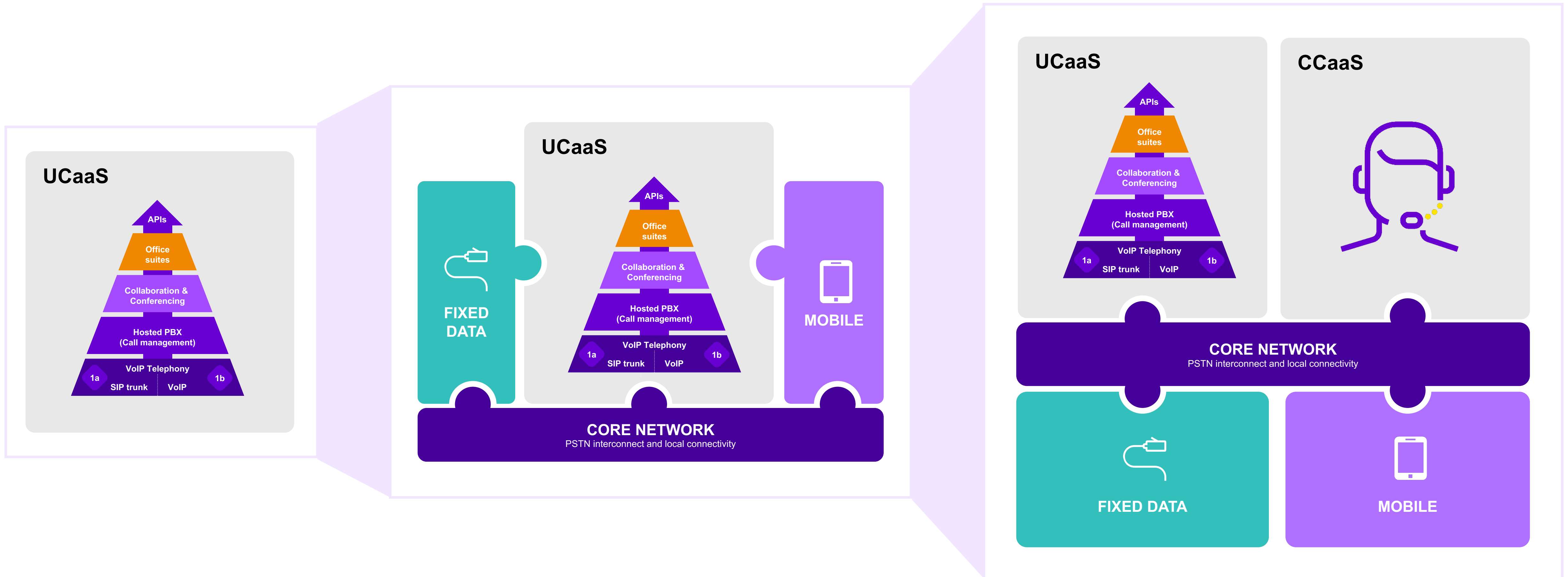


## MS Teams Full UCaaS



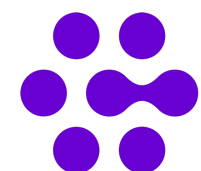
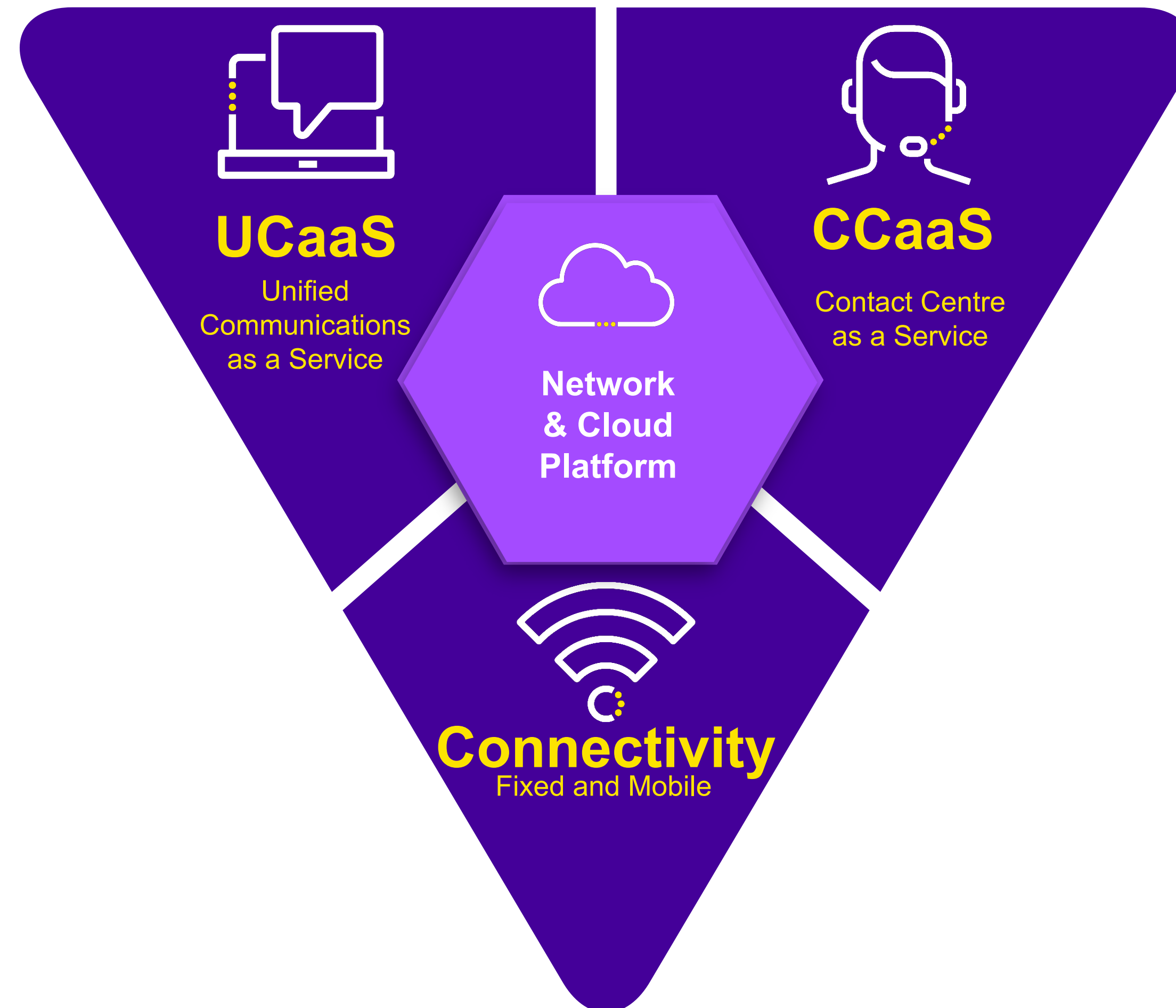
# We believed a full connectivity wrap was a critical part of Unified Communications to deliver business quality experience and later added focus on Contact Centre

## The connectivity wrap and CCaaS



# Gamma focuses today in three key communication markets: UCaaS, CCaaS and Connectivity, bringing them together with its own SIP, Network & Cloud Platforms

## Gamma markets

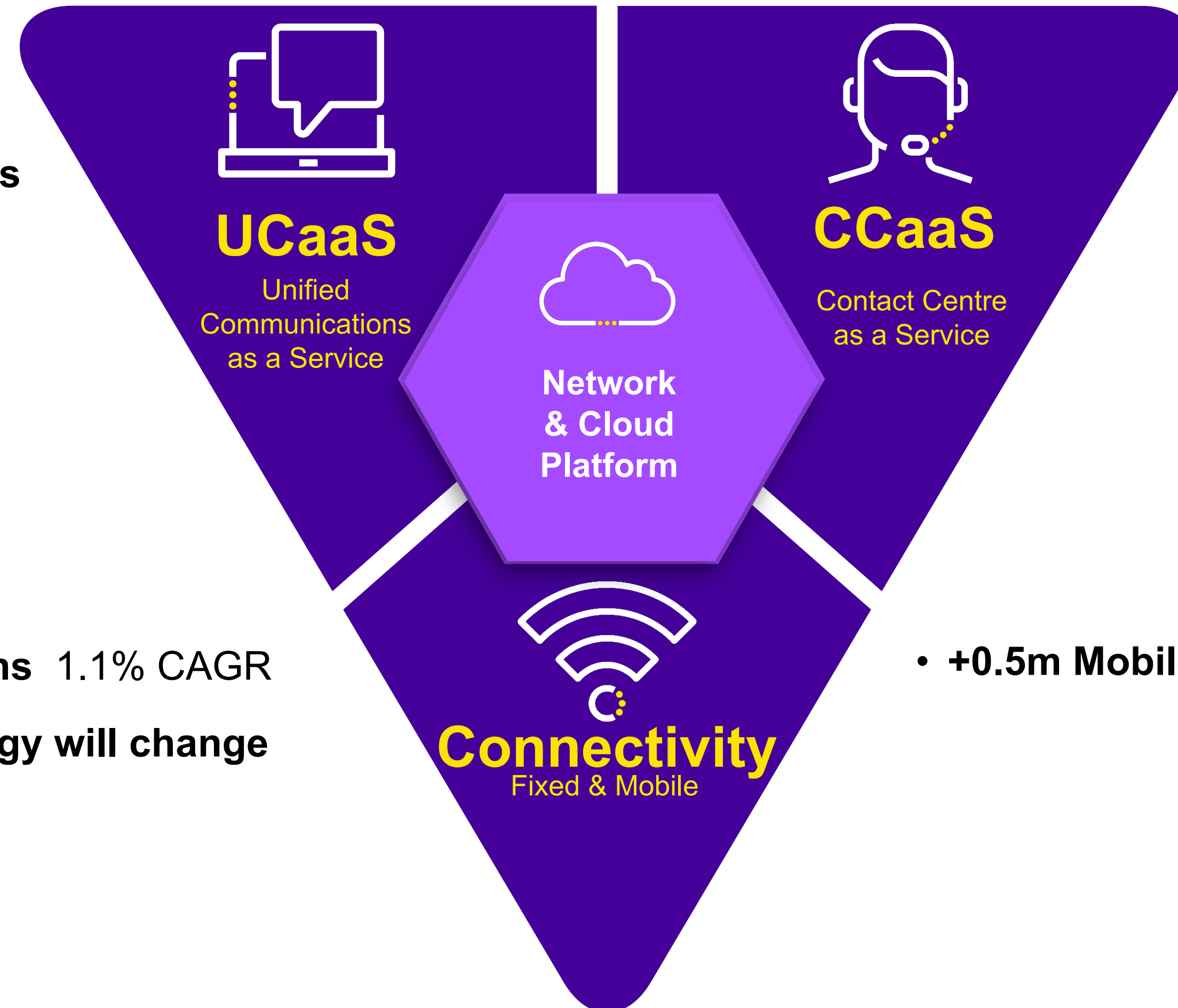


# Gamma's active markets have an attractive growth forecast, especially UCaaS

## UK market and 2025 forecast

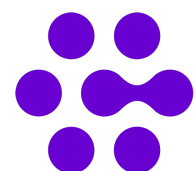
- **+8m Cloud communication seats** (+100%) 19% CAGR
- **+3m PSTN lines migration**
- **+0.5m SIP trunks** 2.5% CAGR

- **+200k Fixed connections** 1.1% CAGR
- **Mix of access technology will change**



- **+220k Cloud contact centre seats** (+50%) 7.8% CAGR
- **Addition of informal contact centres**

- **+0.5m Mobile subscriptions** 0.8% CAGR

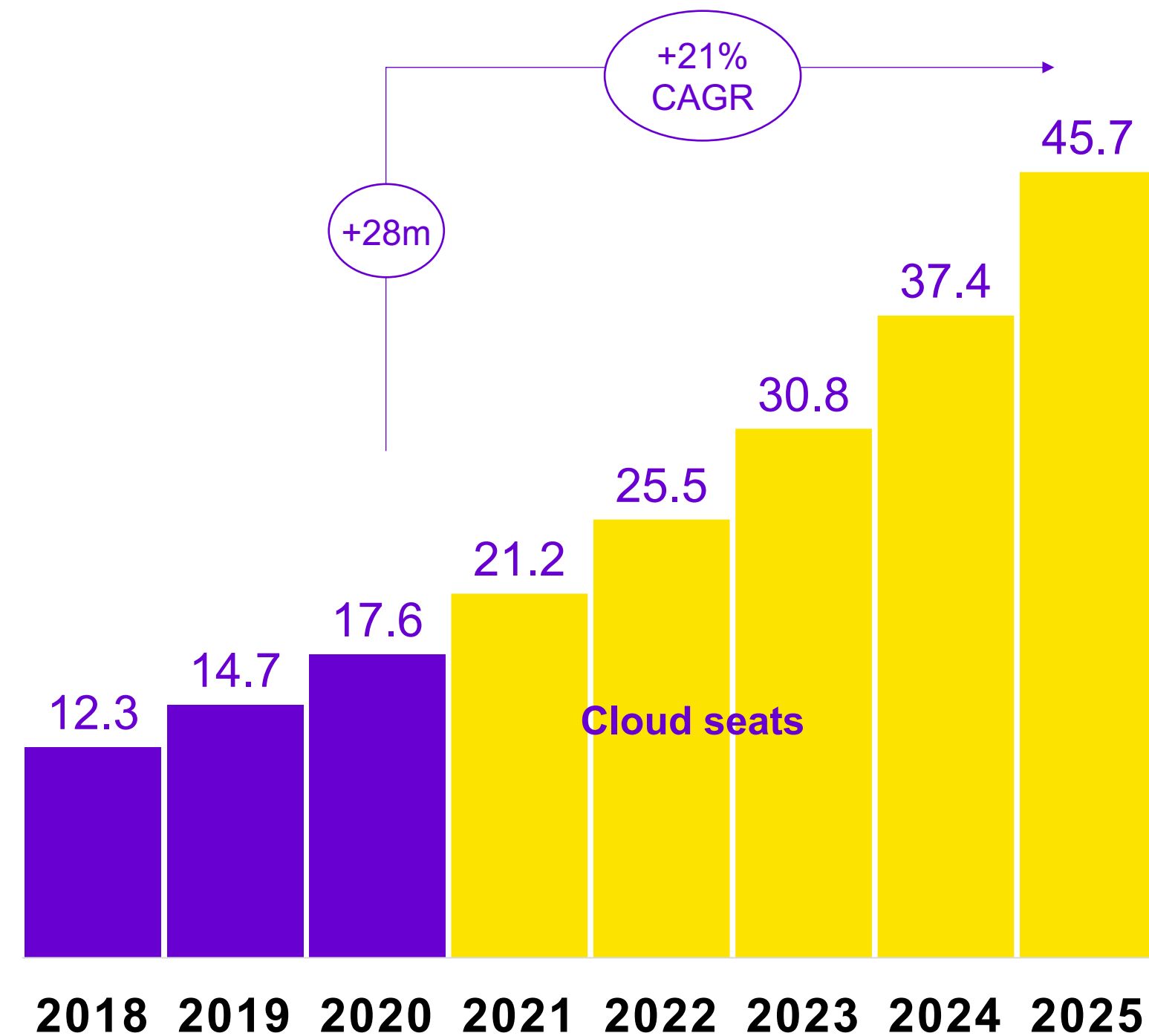




# Through our extended reach and capabilities, we can now tap into a major growth opportunity in Western Europe

## Europe Cloud Communications market

### 103.7m Total PBX seats

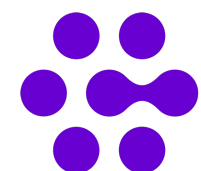
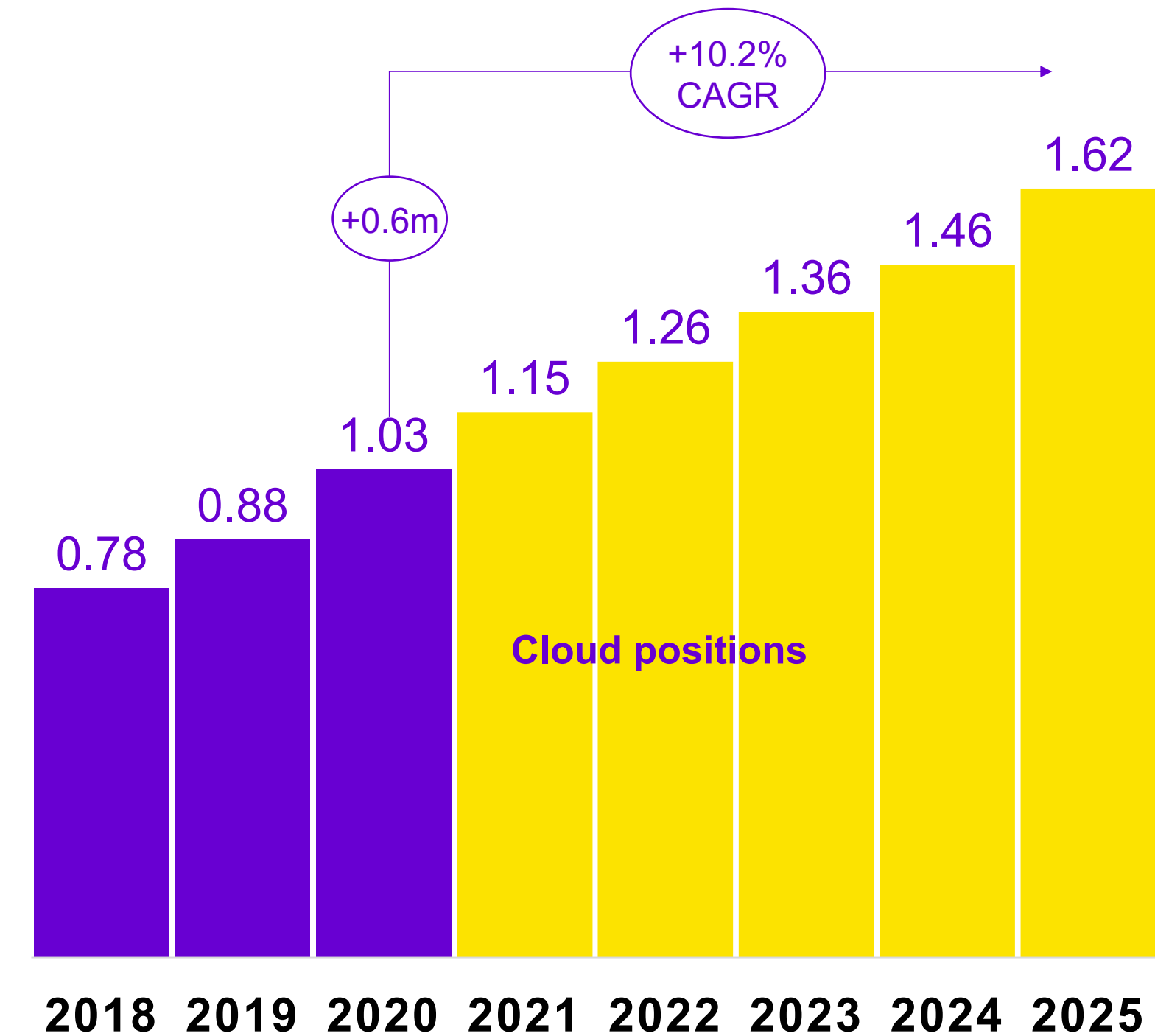


### Post COVID Forecast variation<sup>1</sup>



## Europe Cloud Contact Centre market

### 2.9m Total Agent Positions

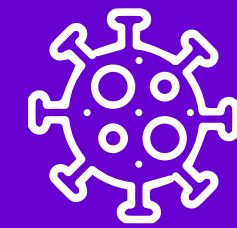
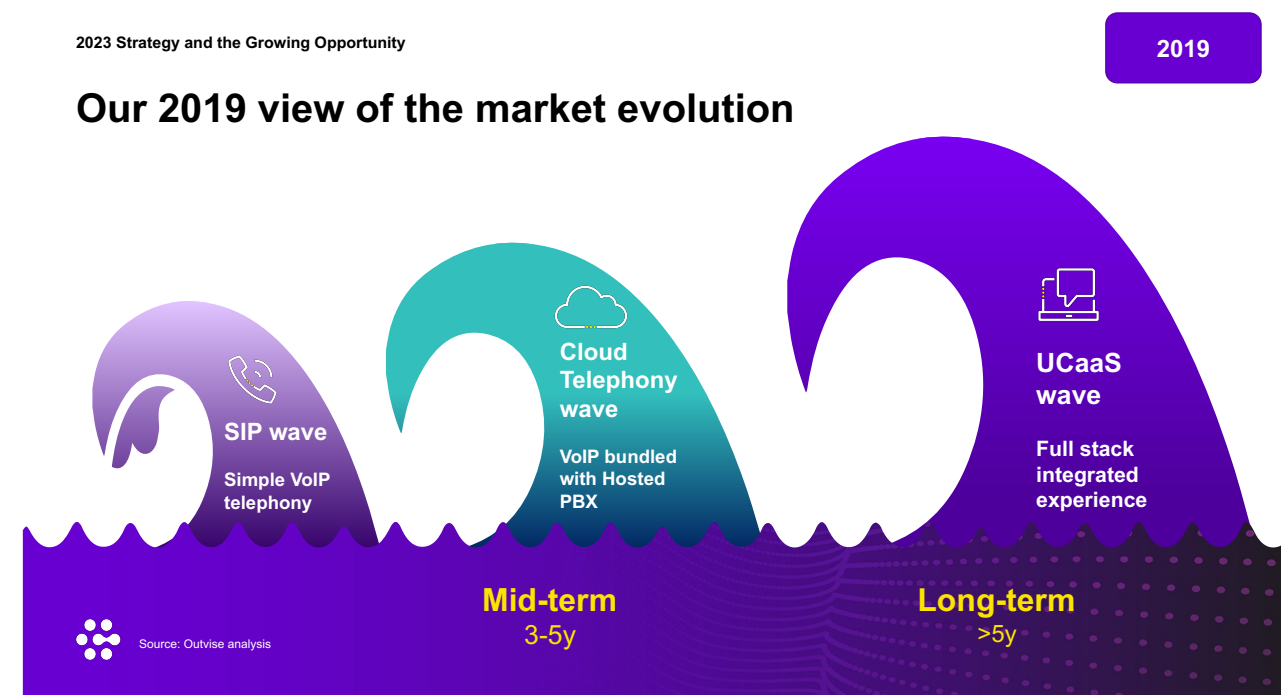


Sources: Internal analysis, Cavell, Analysys Mason, OMDIA  
<sup>1</sup> Cavells forecast updated Q4 2019 vs Cavell's forecast updated Q4 2020      Growth is CAGR 2020-2025

# We are aware that the market outlook will change again once the Pandemic is over

## Market outlook to 2026

### PRE PANDEMIC

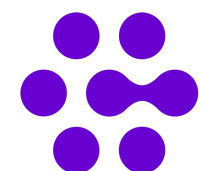


### COVID PANDEMIC

- Business have already been **operating at the extreme** for a sustained period
- **Mass adoption of Online technology** in both professional and personal lives
- Acceptance of **Video**

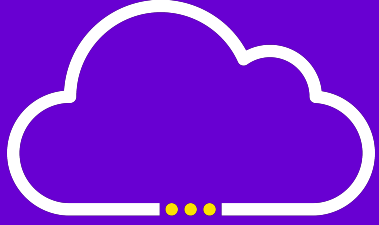
### POST PANDEMIC

- Emergence of the hybrid model, **user and buyer behaviours will change again**
- Introducing **long term decisions** vs tactical
- Convergence of **Business applications and communications**
- **What part will video play** and what other technologies will emerge



# Our M&A execution has been driven by the 2023 strategic priorities, adding new reach and capabilities to Gamma

M&A execution in line with 2023 Strategy

 UCaaS

 Digital capabilities

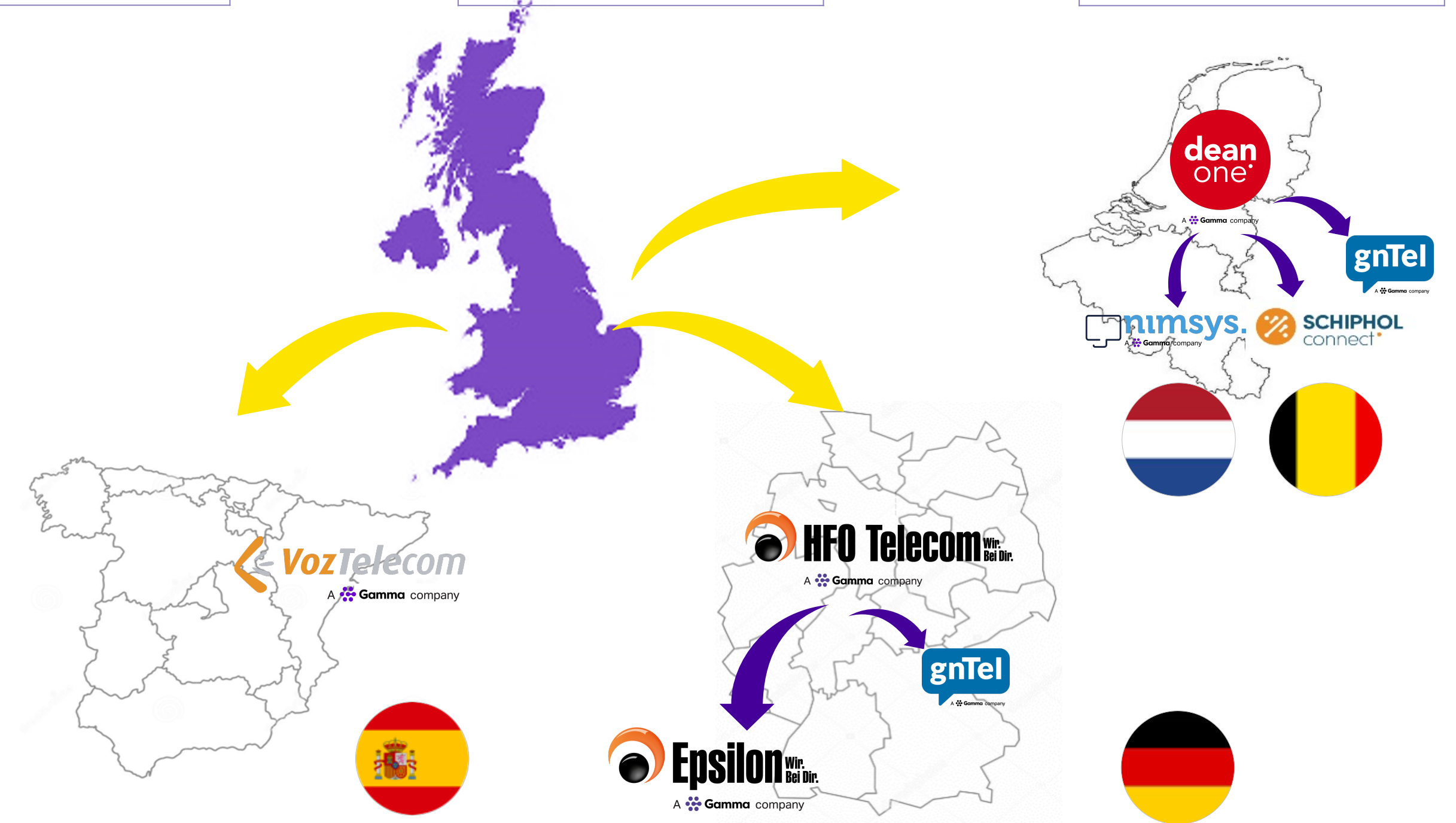
**Europe**

- Netherlands: **gnTel** (A Gamma company) - July 2020
- Netherlands: **nimsys.** (A Gamma company) - March 2019
- Netherlands: **dean one** (A Gamma company) - October 2018
- Germany: **HFO Gruppe** (Wir. Bei Dir.) (A Gamma company) - July 2020
- Spain: **VozTelecom** (A Gamma company) - April 2020

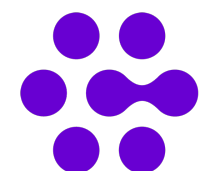
Group Technology: **Exactive** (A Gamma company) - March 2020

Group Technology: **telsis** (A Gamma company) - Nov 2019

Group Technology: **mission labs.** (A Gamma company) - March 2021



Dates reflect the Date of Acquisition

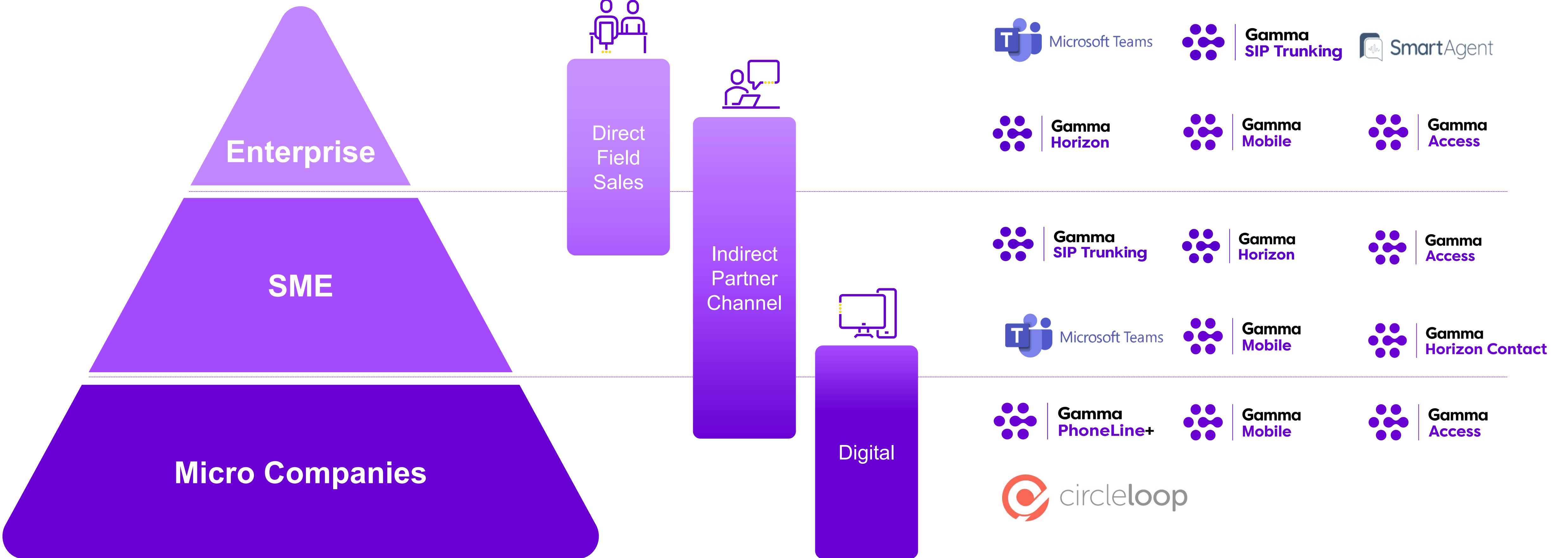


# Our focus is on realising multiple, compelling growth drivers: Multiple business segments & geographies, served through several channels and product areas

## Business Segment

## Channel

## Proposition





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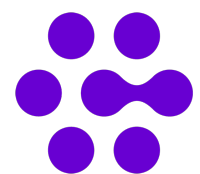
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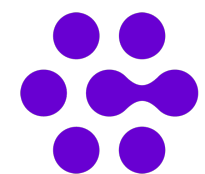
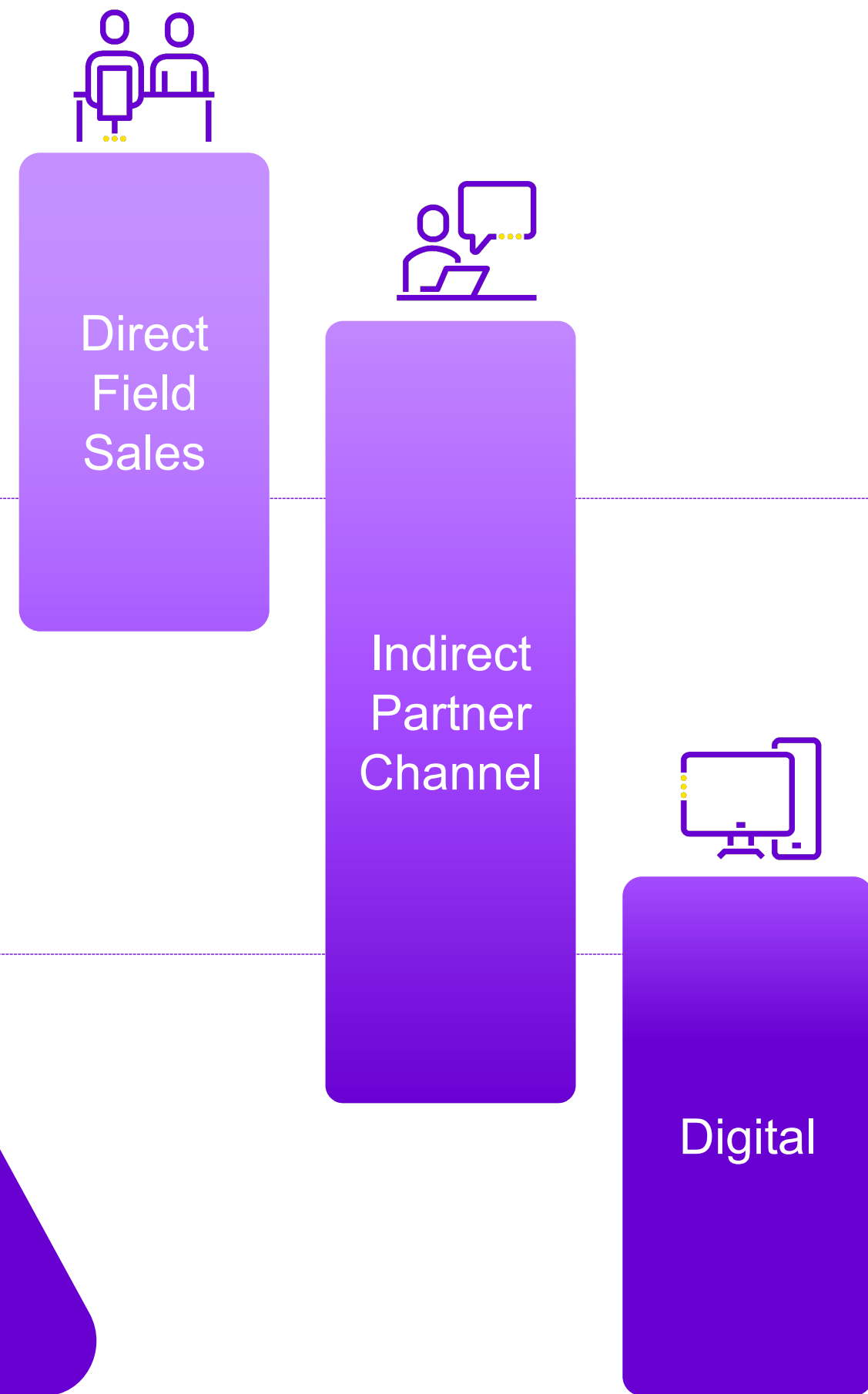
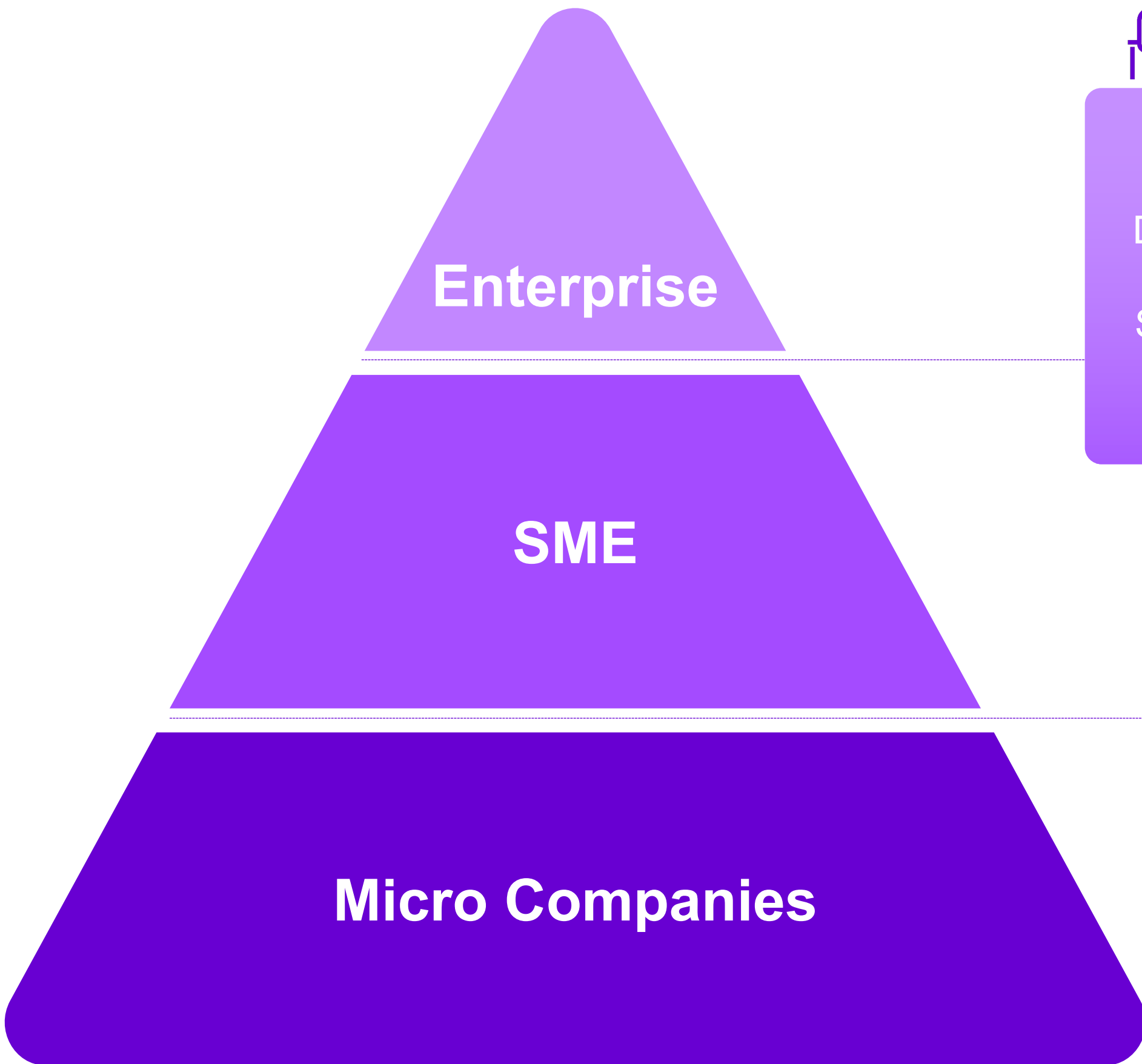


# Product – Channel – Segment fit

## Business Segment

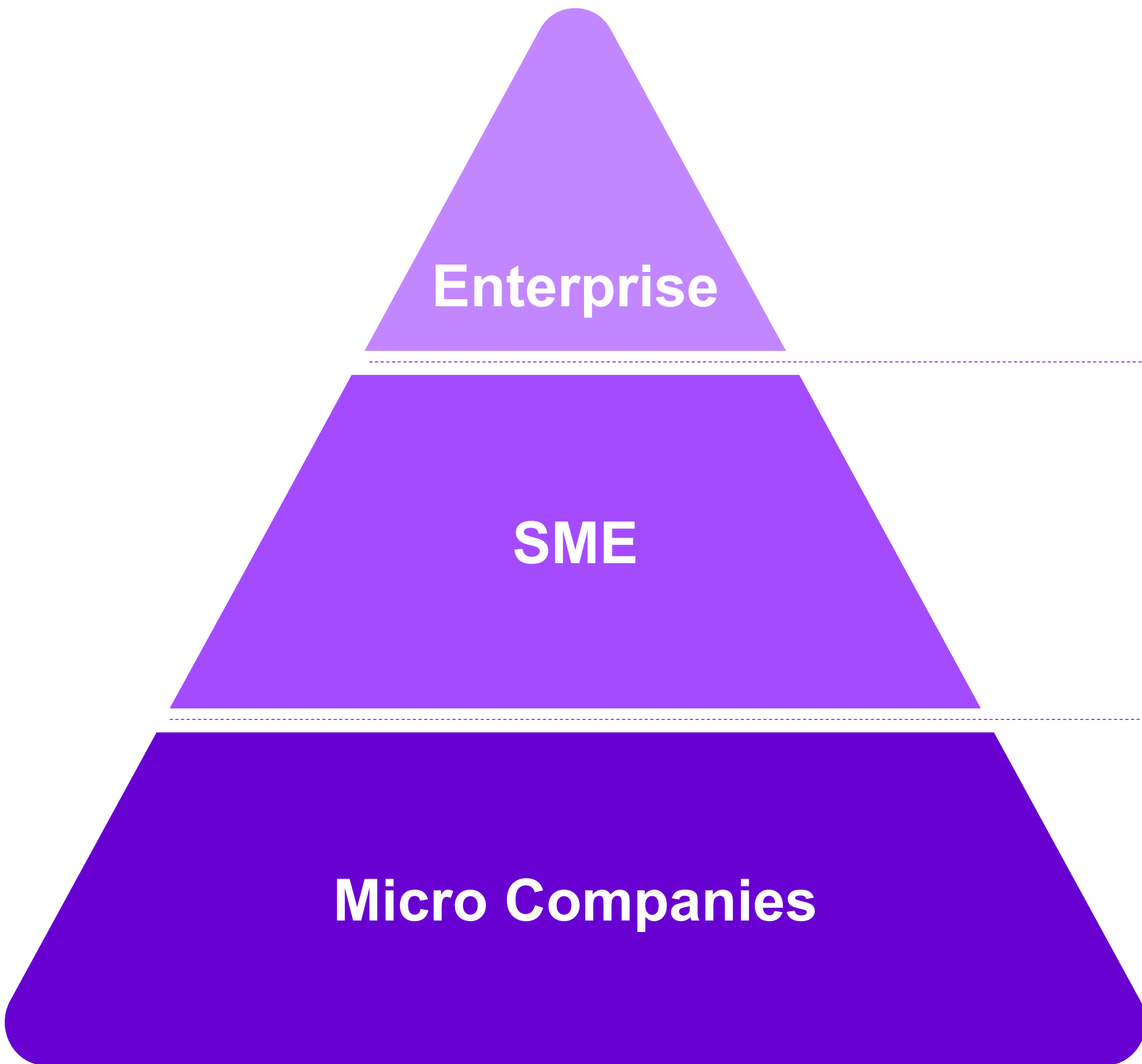
## Channel

## Proposition



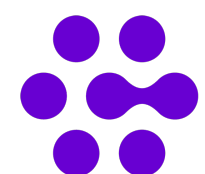
# We serve all UK B2B segments. The needs of each segment are different

## Business market segments



Market segment size	Cloud PBX penetration	General market trends	Gamma Share	Typical applications
 <b>10.9m</b> <b>8k</b> <b>£2.1tn</b>	 <b>MEDIUM</b>	<ul style="list-style-type: none"> <li>Accelerated move to cloud</li> <li>Often bespoke</li> <li>Focus on customer experience</li> </ul>	 <b>MEDIUM</b>	<ul style="list-style-type: none"> <li>Horizon</li> <li>SmartAgent</li> <li>Ethernet</li> <li>SIP</li> <li>Mobile</li> </ul>
 <b>7.7m</b> <b>250k</b> <b>£1.3tn</b>	 <b>HIGH</b>	<ul style="list-style-type: none"> <li>Move to Cloud PBX underway</li> <li>Increasingly demanding</li> </ul>	 <b>HIGH</b>	<ul style="list-style-type: none"> <li>Horizon Contact</li> <li>Horizon Collaborate</li> <li>Mobile</li> <li>Broadband</li> </ul>
 <b>9.2m</b> <b>5.7m</b> <b>£0.9tn</b> <small>Employees    Businesses    Turnover</small>	 <b>MEDIUM</b>	<ul style="list-style-type: none"> <li>Advancing needs</li> <li>Increasingly digitally-driven</li> </ul>	 <b>MEDIUM</b>	<ul style="list-style-type: none"> <li>PhoneLine+</li> <li>CircleLoop</li> </ul>

Source: Department for Business, Energy & Industrial Strategy & internal analysis



# We focus on solving key needs of our customers

## Customer issues



"I need..."

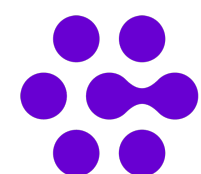
"...stable reliable connectivity"

"...my customers to reach me easily and efficiently"

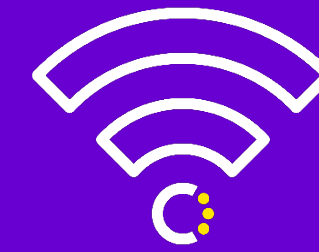
"...to reach out to my customers and suppliers"

"...my employees to work together"

"...to have a unified view of every conversation"



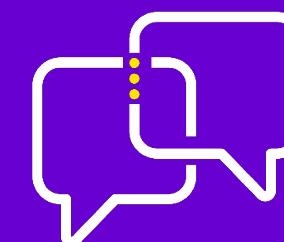
## Customer needs



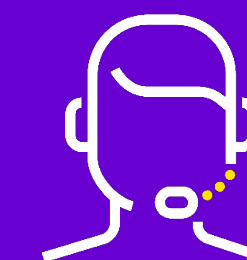
**Connectivity**



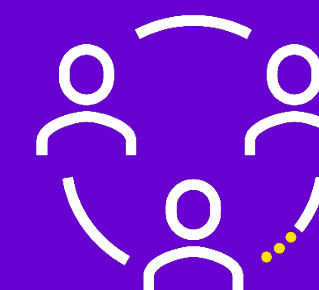
**Voice communication**



**Internal conversations**



**External conversations**

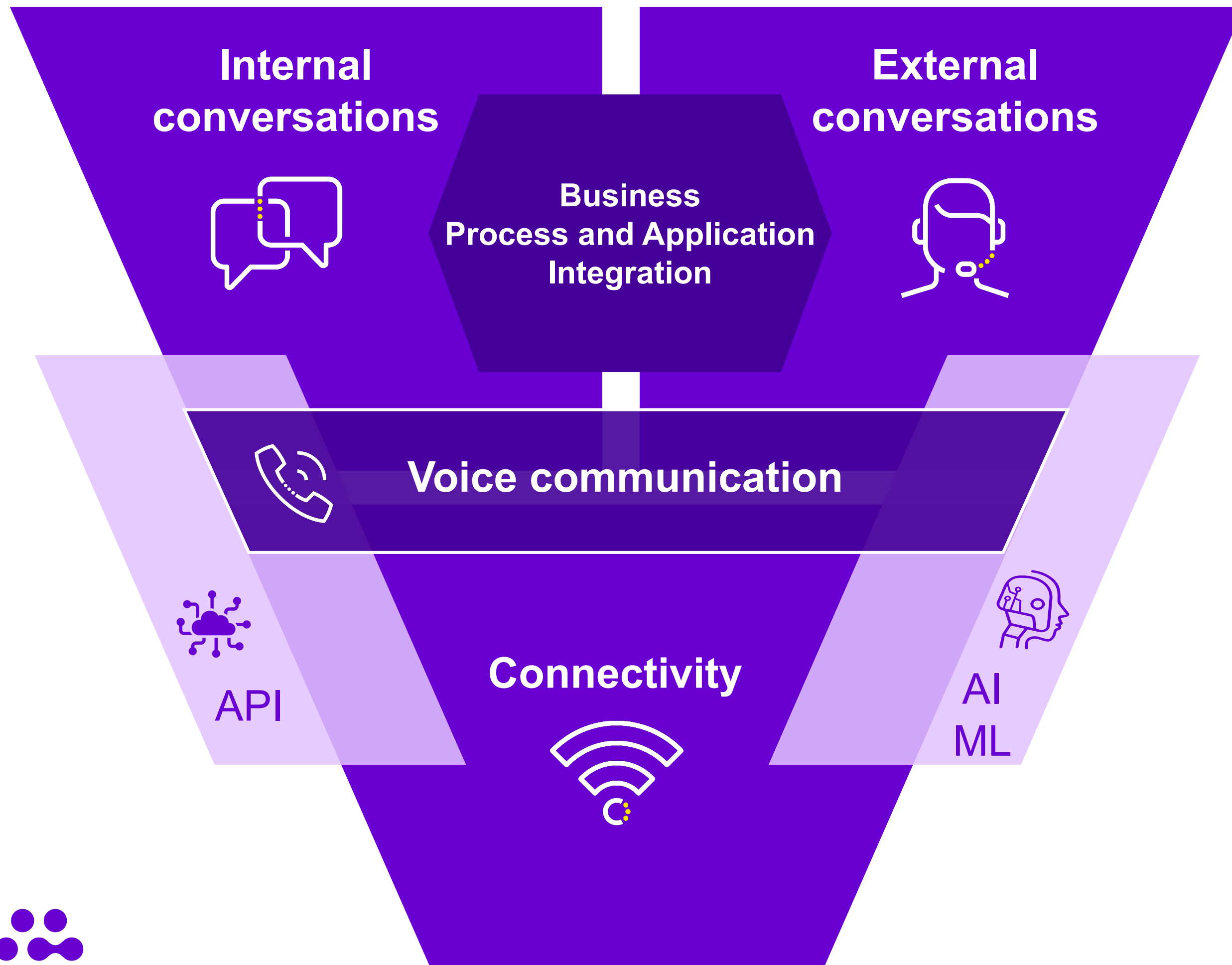


**Business processes and applications integration**



# So what are we doing to solve these problems?

## Customer needs and Gamma's offering



### Cloud Telephony

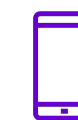
#### SIP

#### VoIP

- Internal calls
- PSTN calls
- Desk phones, Headsets

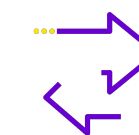
#### Call control

- IVR, extensions, greetings
- Hunt groups, queues



### Mobile

- 5G
- 4G
- Wi-Fi Services



### Fixed

- Broadband
- Ethernet
- WAN Services



### Collaboration & Meetings

- Voice conferencing
- Video conferencing
- Messaging
- Screen-share & co-browse
- Share files



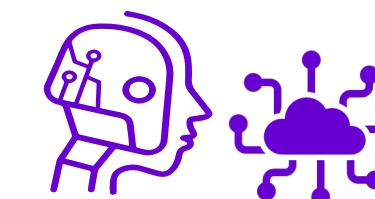
### Conversation Management

#### Omni channel communications

- Webchat, Social Media, Email, SMS
- Voice & Video

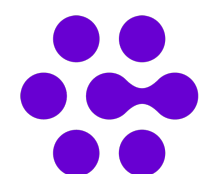
#### Call recording

#### Card payments (PCI DSS)



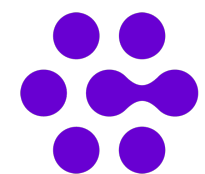
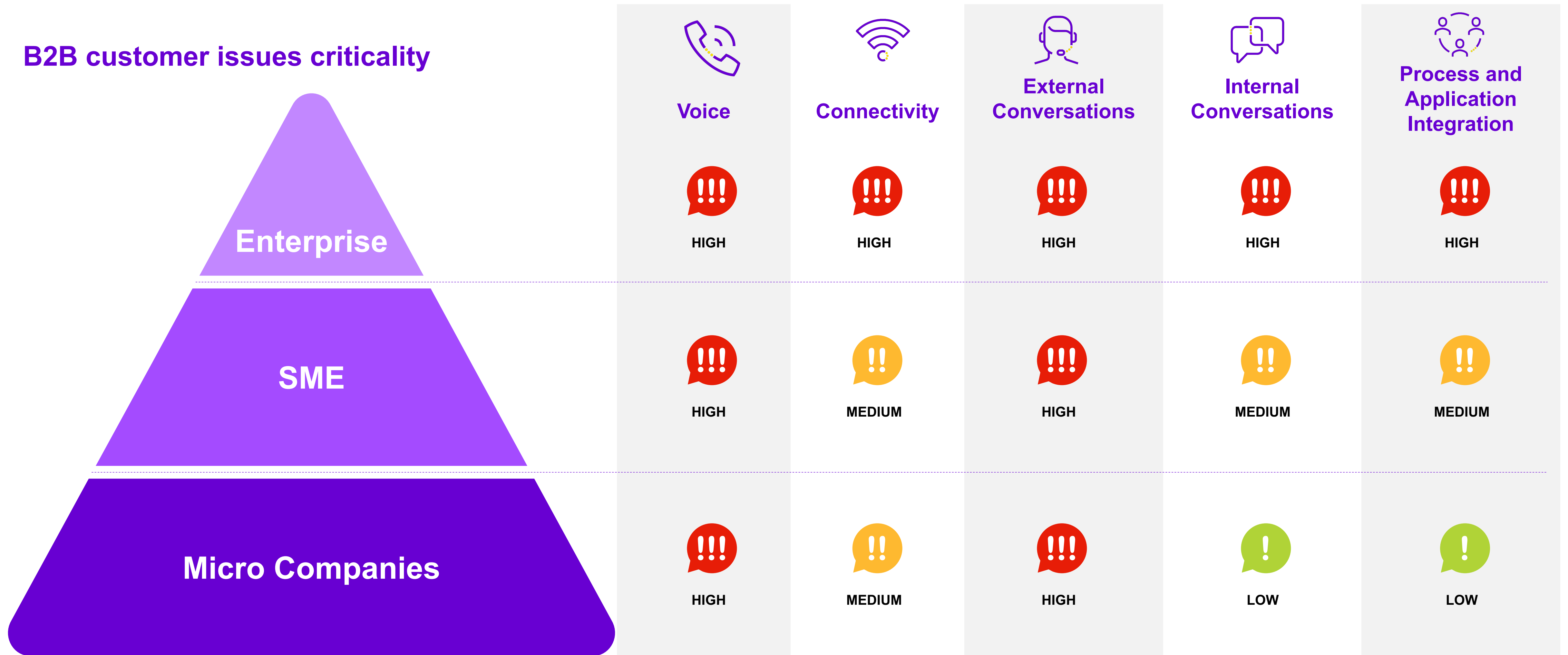
### Insights & Automation

- Analytics and reporting
- APIs
- Automation through AI / ML



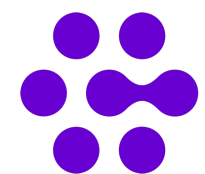
# The criticality of each of those issues varies across business segments

## B2B customer issues criticality



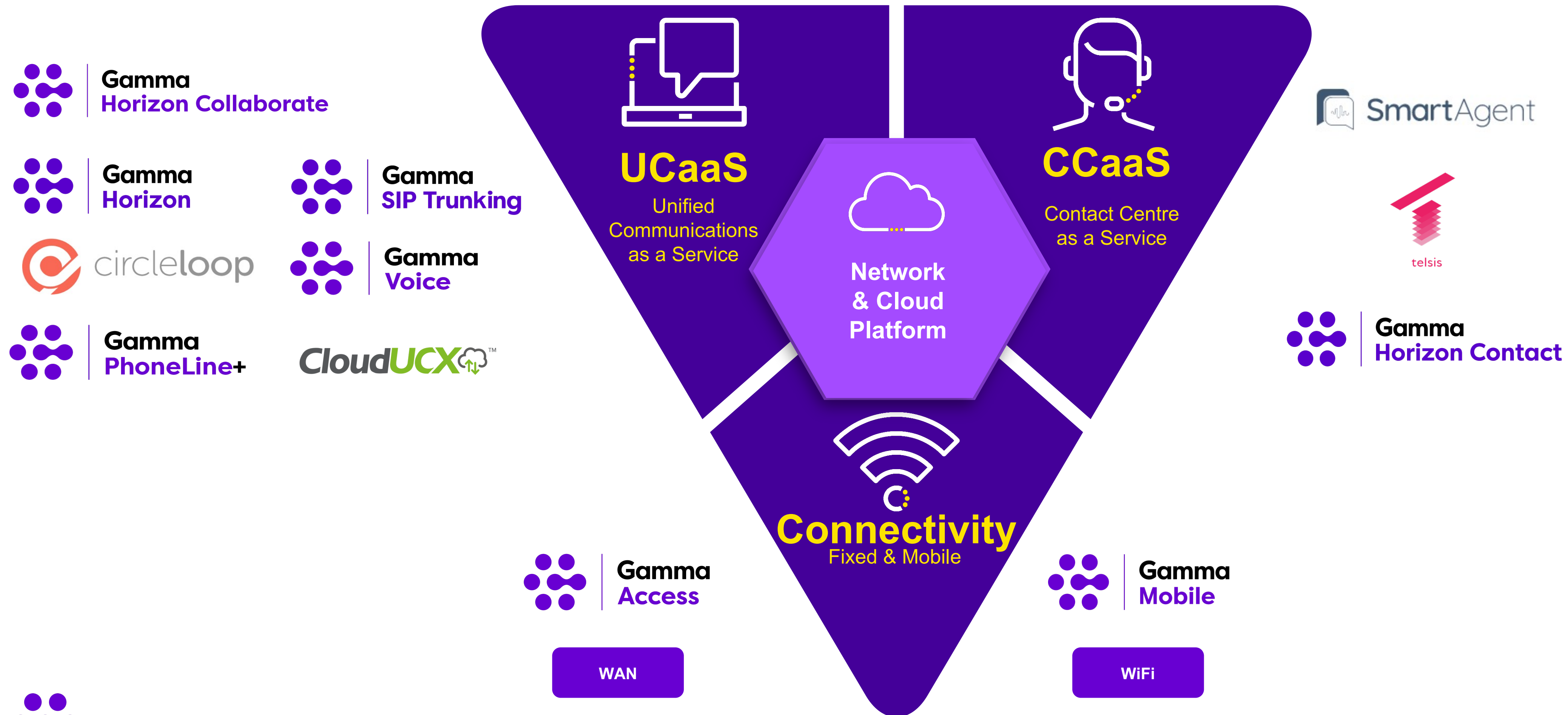
We provide those solutions to each customer segment through the right channel, as our routes to market approach is driven by customer behaviour

B2B customer channel

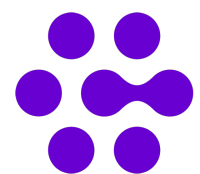


# Gamma has built a strong and comprehensive product portfolio to serve those markets

## Gamma's product portfolio

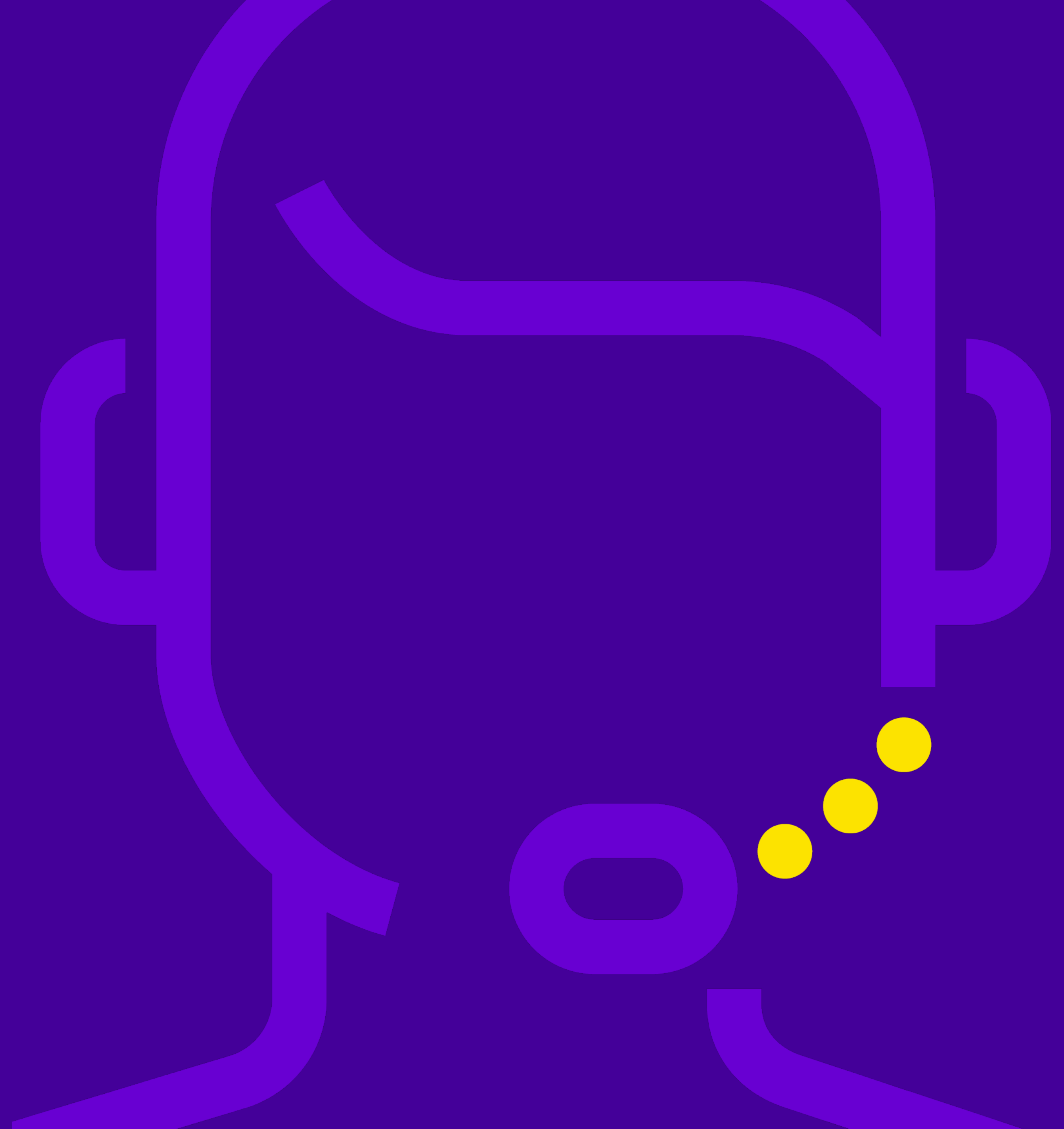
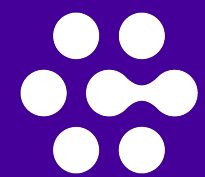


Other Gamma Voice products: Inbound, CPS, WLR Other products we offer through partnerships: Cirrus, Horizon Call Centre, Akixi, ...



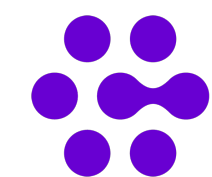
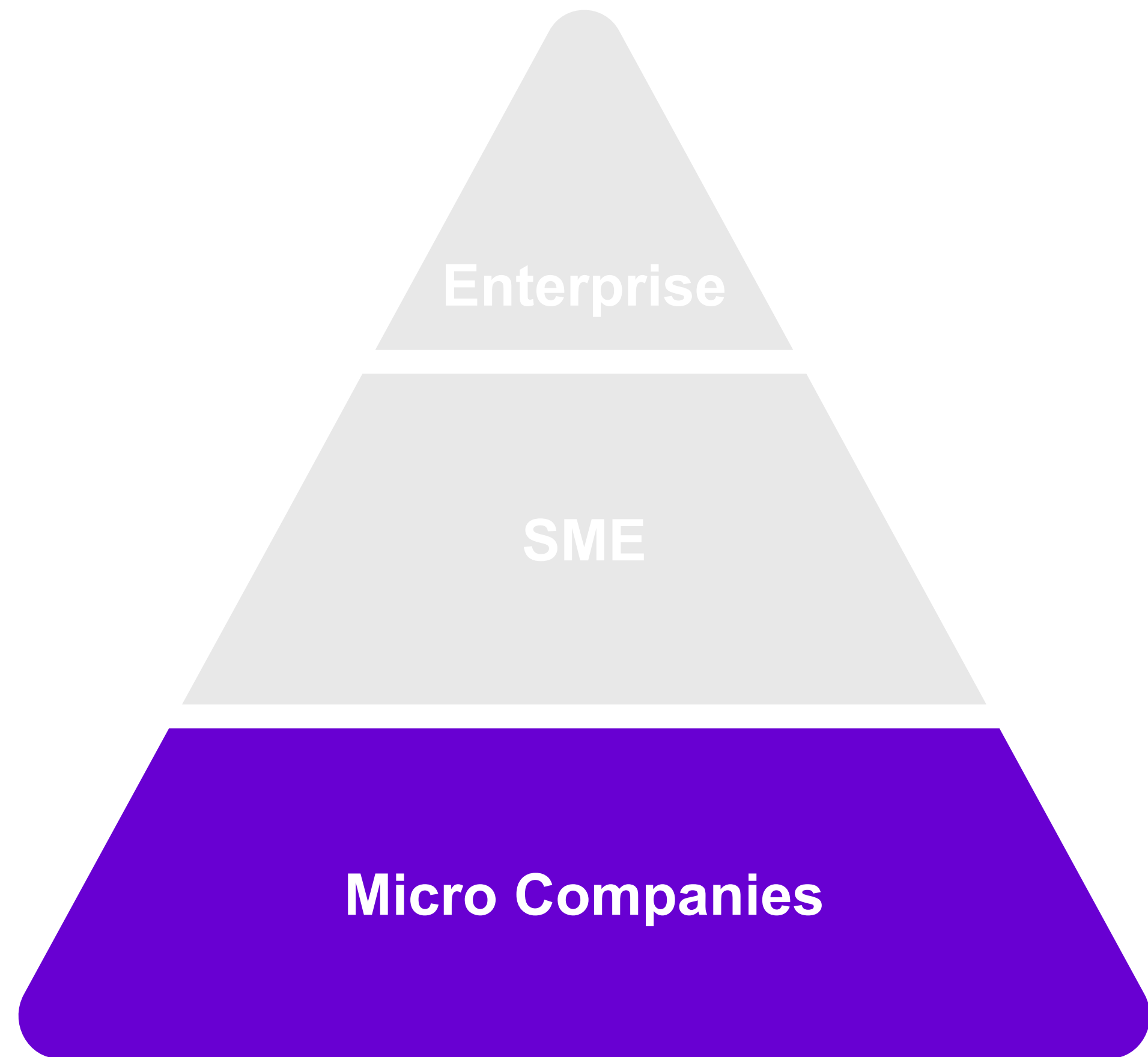
Market Segmentation  
and Product Portfolio

# Micro Companies

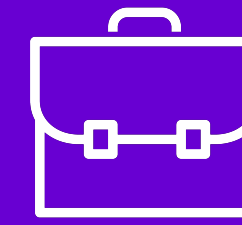


# The Micro segment is characterised by simpler needs, and high volume

## Micro companies



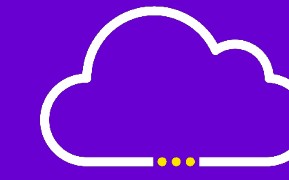
## Market Segmentation and Product Portfolio Micro Companies



**5.7m**

Businesses

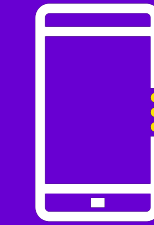
96% of UK



**1.5m**

Cloud comm seats

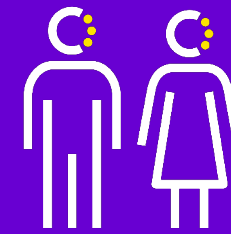
25% of UK



**2.3m**

Mobile lines

20% of UK



**9.2m**

Employees

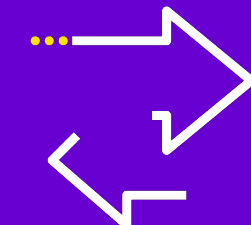
33% of UK



**<0.01m**

Cloud contact centre agent seats

1% of UK



**2.2m**

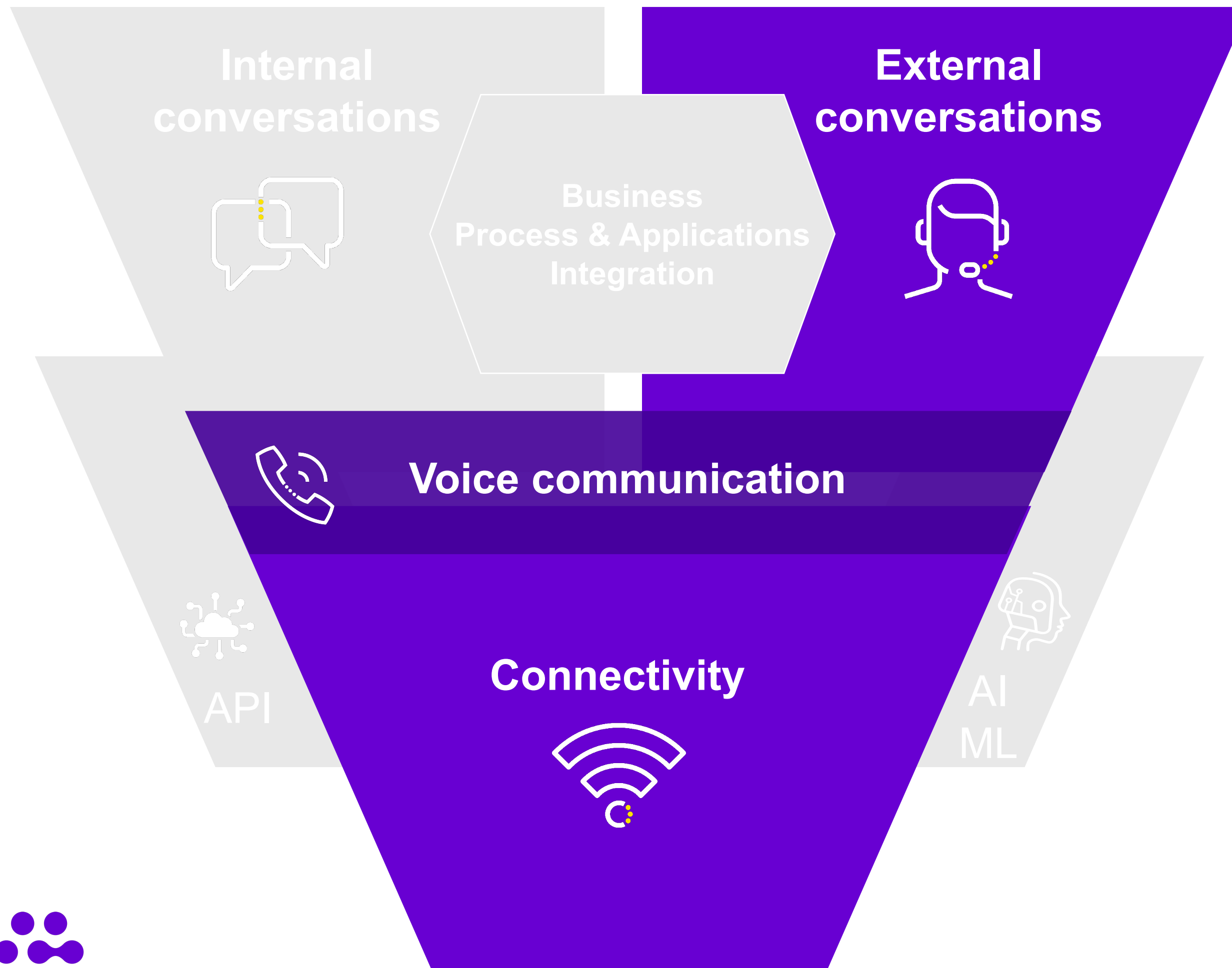
Fixed access lines

65% of UK

- PSTN Switch off creates significant opportunity
- Core needs are to secure the basic services
- More advanced needs now beginning to emerge
- Increasingly digital-native and digital-first thinking

# Problems we solve in the Micro market

## Customer needs and Gamma's offering



### Cloud Telephony

- SIP VoIP**
- Internal calls
  - PSTN calls
  - Desk phones, Headsets



### Conversation Management

- Omni channel communications**
- Webchat, Social Media, Email, SMS



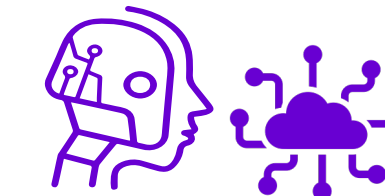
### Mobile

- 5G
- 4G
- Wi-Fi Services



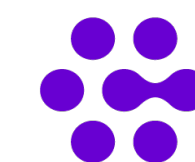
### Fixed

- Broadband
- Ethernet



### Insights & Automation

- Analytics and reporting
- APIs



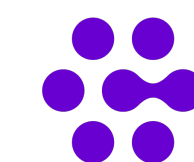
**Gamma  
PhoneLine+**



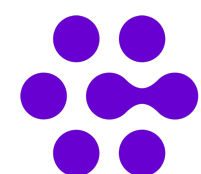
**Gamma  
Mobile**



circleloop

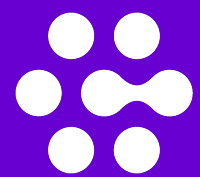


**Gamma  
Access**





Modern day business communications





## Delivery to market

- Leveraging existing indirect channels
- Increasingly digital-first
- Convergence of IT and communications remains elusive

## How we win

- Simplicity
- Clarity
- Flexibility and Optionality
- Aggregation and extensibility
- Focus on overall experience

**Innovation driven by customer-led requirements**

**Historical strengths in channel and service support differentiation**

# Competition

- Existing single line providers targeting this space
- Regulatory barriers for new entrants remain high

# Market change PSTN switch off

- 2025 - Withdrawal of core connectivity infrastructure
- Creates Connectivity and Application stimulus
- Opportunity for migration and new business
- Gamma fixed products and services are advantaged here
- Mobile capability also presents an alternative and an opportunity in this space

# Future direction Channels

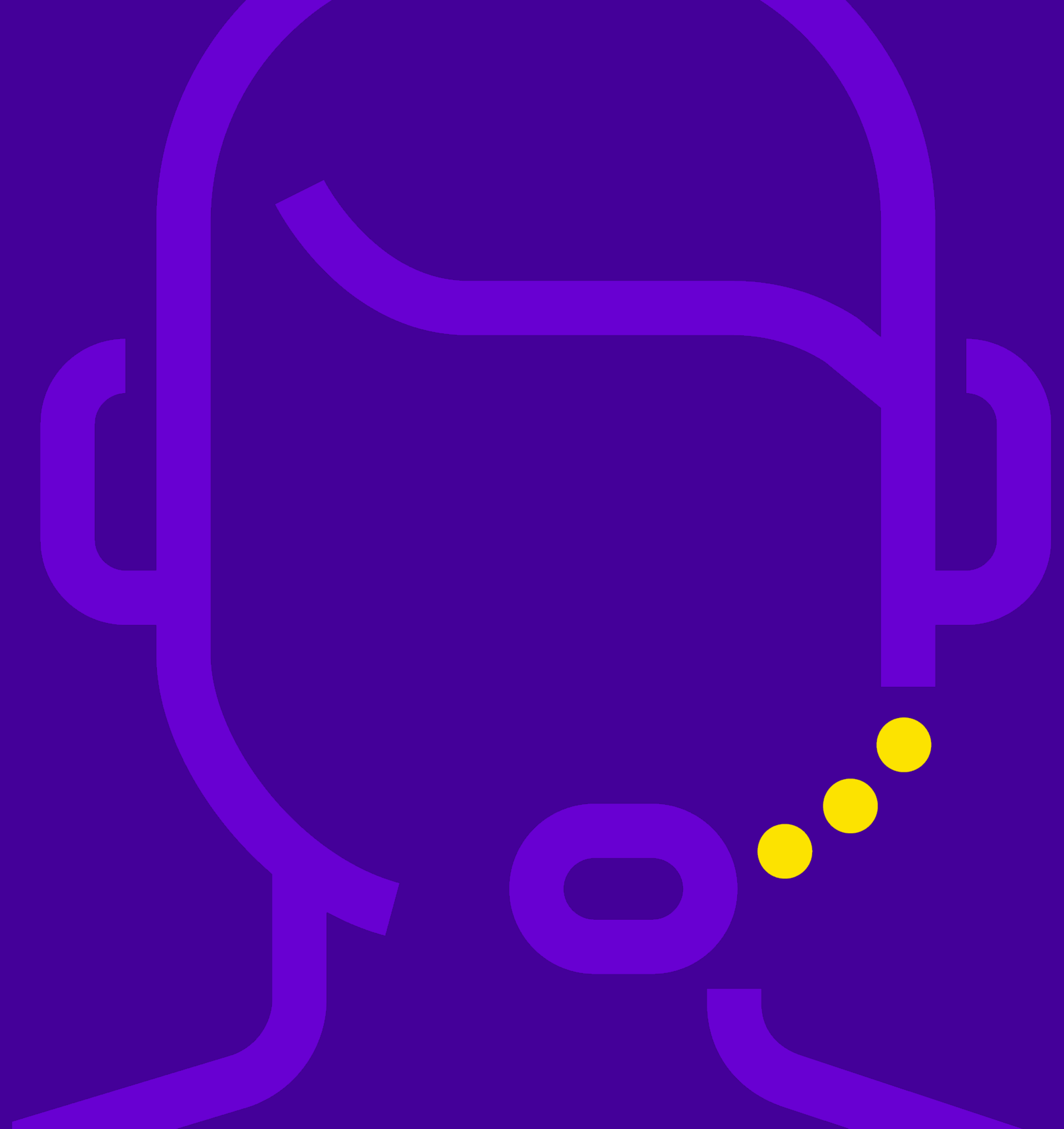
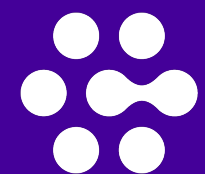
- Expand digital channel coverage and capability
- Support new indirect models
- Future European expansion

# Capabilities

- Wider range of conversation mechanisms
- Wider range of integrations
- Tighter bundling between connectivity and application services
- Support and driving choice with mobile offering as well as fixed line capability

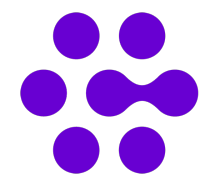
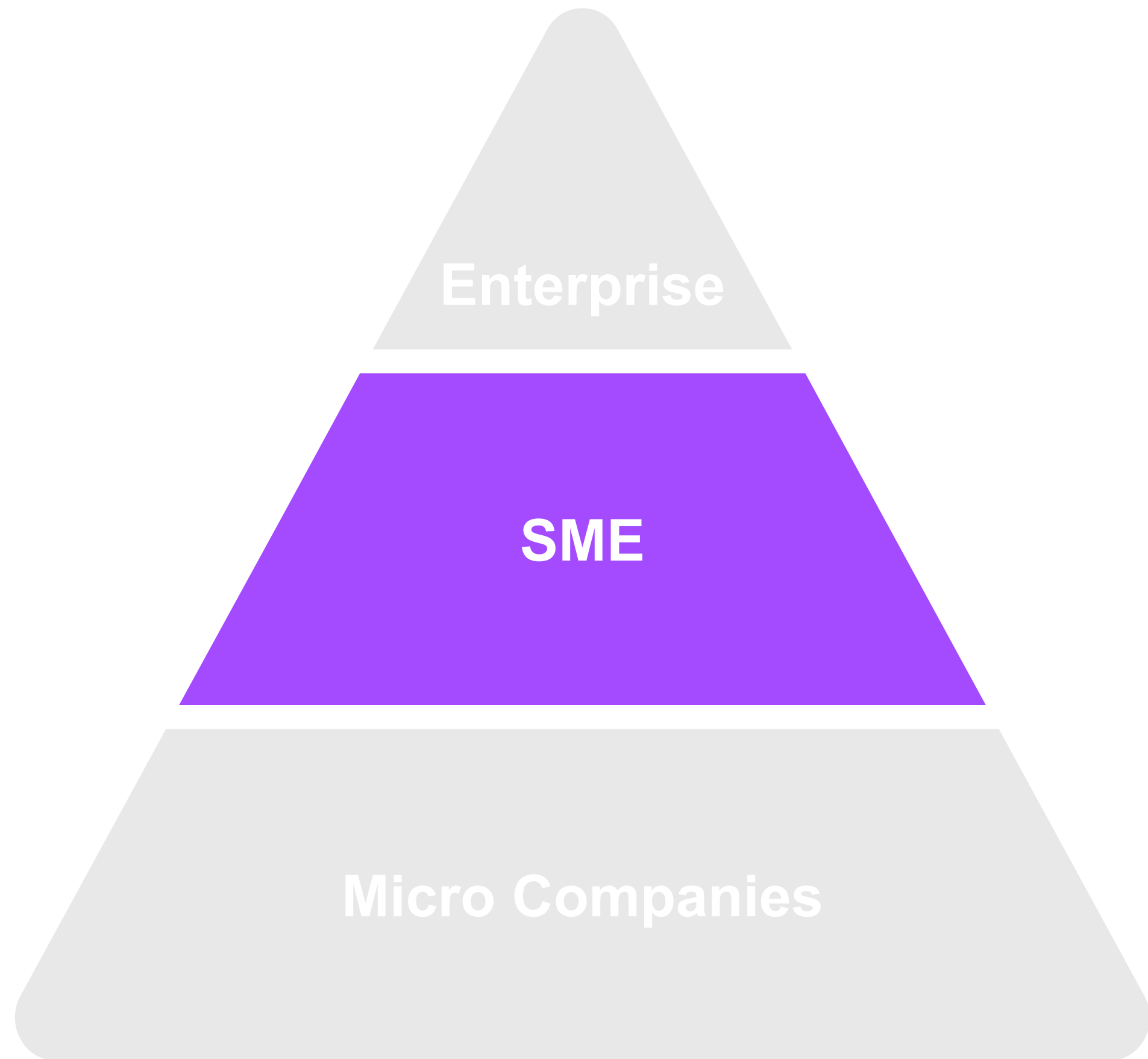
Market Segmentation  
and Product Portfolio

# Small and Medium Enterprises

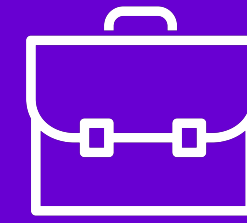


# SMEs need complete solutions that are easy to consume

## Small and Medium Enterprises



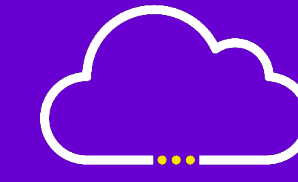
## Market Segmentation and Product Portfolio Small and Medium Enterprises



0.3m

Businesses

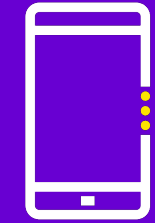
4% of UK



2m

Cloud comm seats

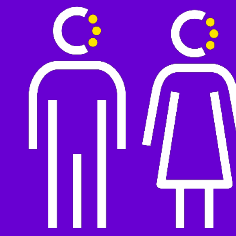
30% of UK



3.4m

Mobile lines

30% of UK



7.7m

Employees

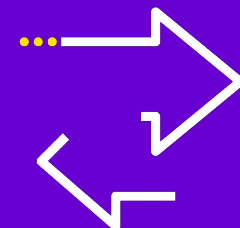
30% of UK



0.20m

Cloud contact  
centre agent seats

40% of UK



0.7m

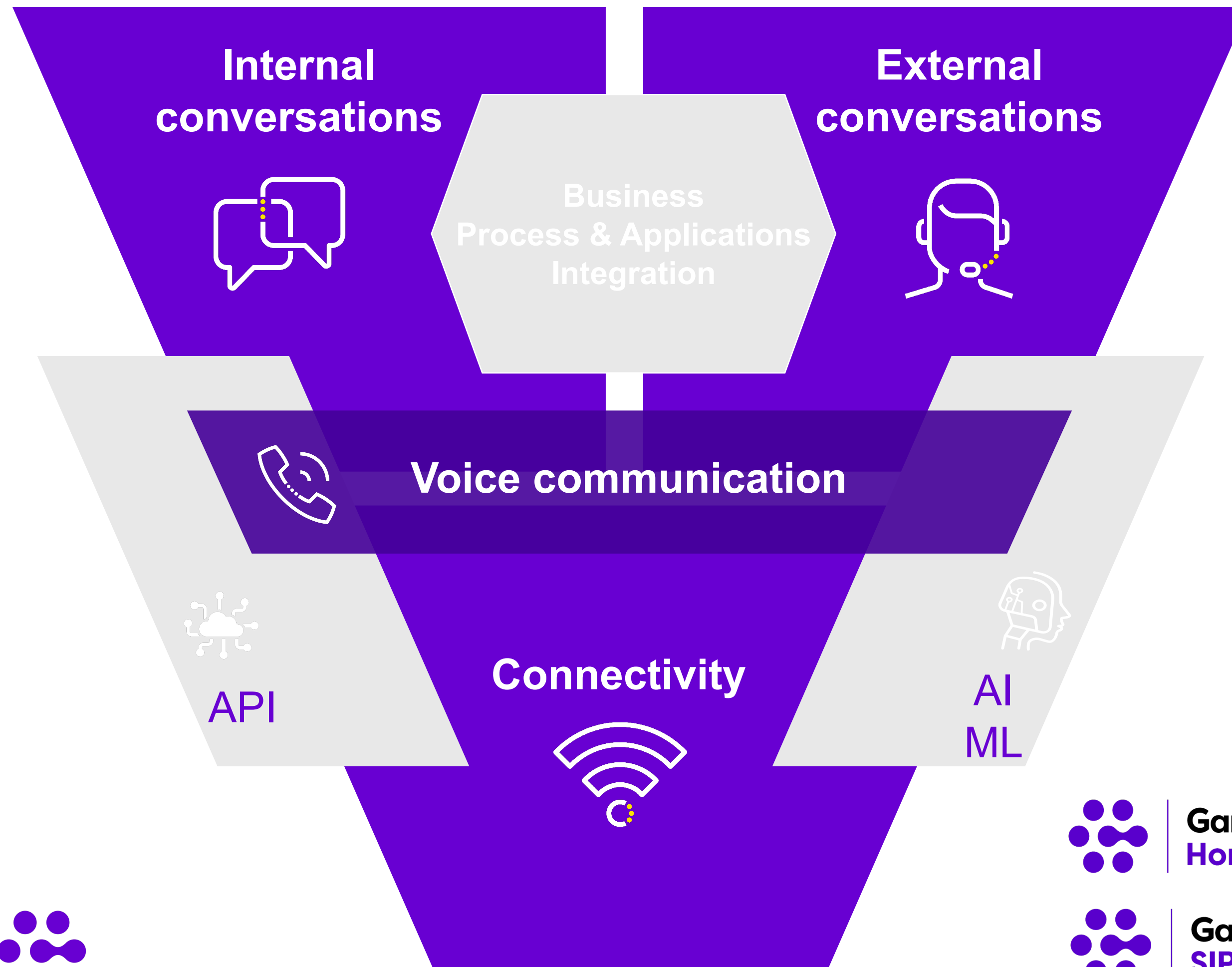
Fixed access lines

20% of UK

- Move to Cloud PBX accelerating
- Increasingly complex functional demands
- Need for conversation capability inside and outside the organisation
- Convergence of drivers creates growth opportunity

# Problems we solve in the SME market

## Customer needs and Gamma's offering



### Cloud Telephony

#### SIP

#### VoIP

- Internal calls
- PSTN calls
- Desk phones, Headsets

#### Call control

- IVR, extensions, greetings
- Hunt groups, queues



### Conversation Management

#### Omni channel communications

- Webchat, Social Media, Email, SMS
- Voice & Video

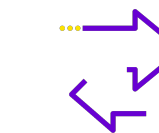
#### Call recording

#### Card payments (PCI DSS)



### Collaboration & Meetings

- Voice conferencing
- Video conferencing
- Messaging (Instant, persistent...)
- Screen-share & co-browse
- Share files



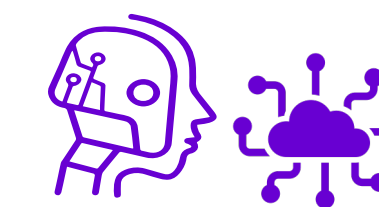
#### Fixed

- Broadband
- Ethernet
- WAN Services



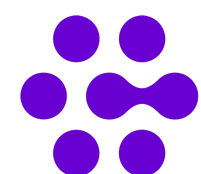
#### Mobile

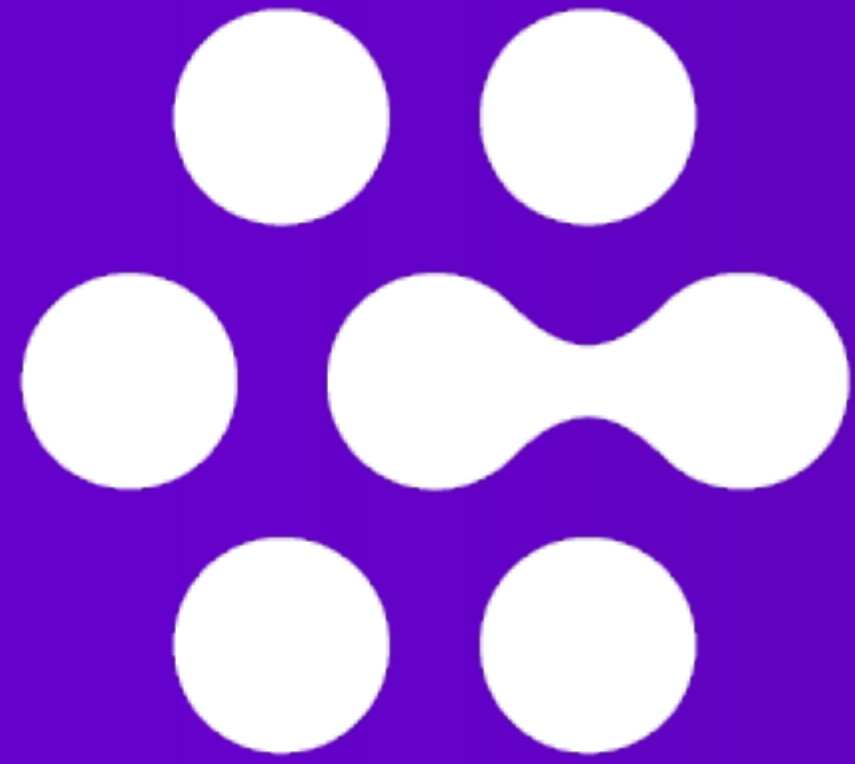
- 5G
- 4G
- Wi-Fi Services



### Insights & Automation

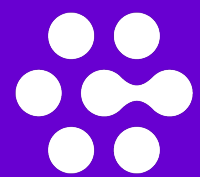
- Analytics and reporting
- APIs





# Gamma Horizon Contact

The Cloud Contact Centre for Horizon



## Delivery to market

- Leverage existing indirect channels
- Creates customer intimacy at scale
- Communications still regarded as “scary and difficult”

## How we win

- Simplicity of doing business remains key
- Clarity and flexibility of proposition
- Fit of commercial offering with customer needs
- Capability of packaged solutions that we deliver

**Historical strengths in channel and service support differentiation**  
**Evolution of product capabilities to serve end-to-end needs**



# Competition

- Microsoft Teams emergence has changed the dynamics in the “internal conversation” market
- RingCentral and 8x8 beginning to target the very top end of this segment

# Market change

## Microsoft Teams

- Many businesses have a Microsoft-driven IT strategy
- Creates a “drag-along” impact to pull Teams into businesses
- Teams cannot provide connection to telephony or address wider conversation needs
- Not needed in entities that have limited remote working

# Future direction Markets

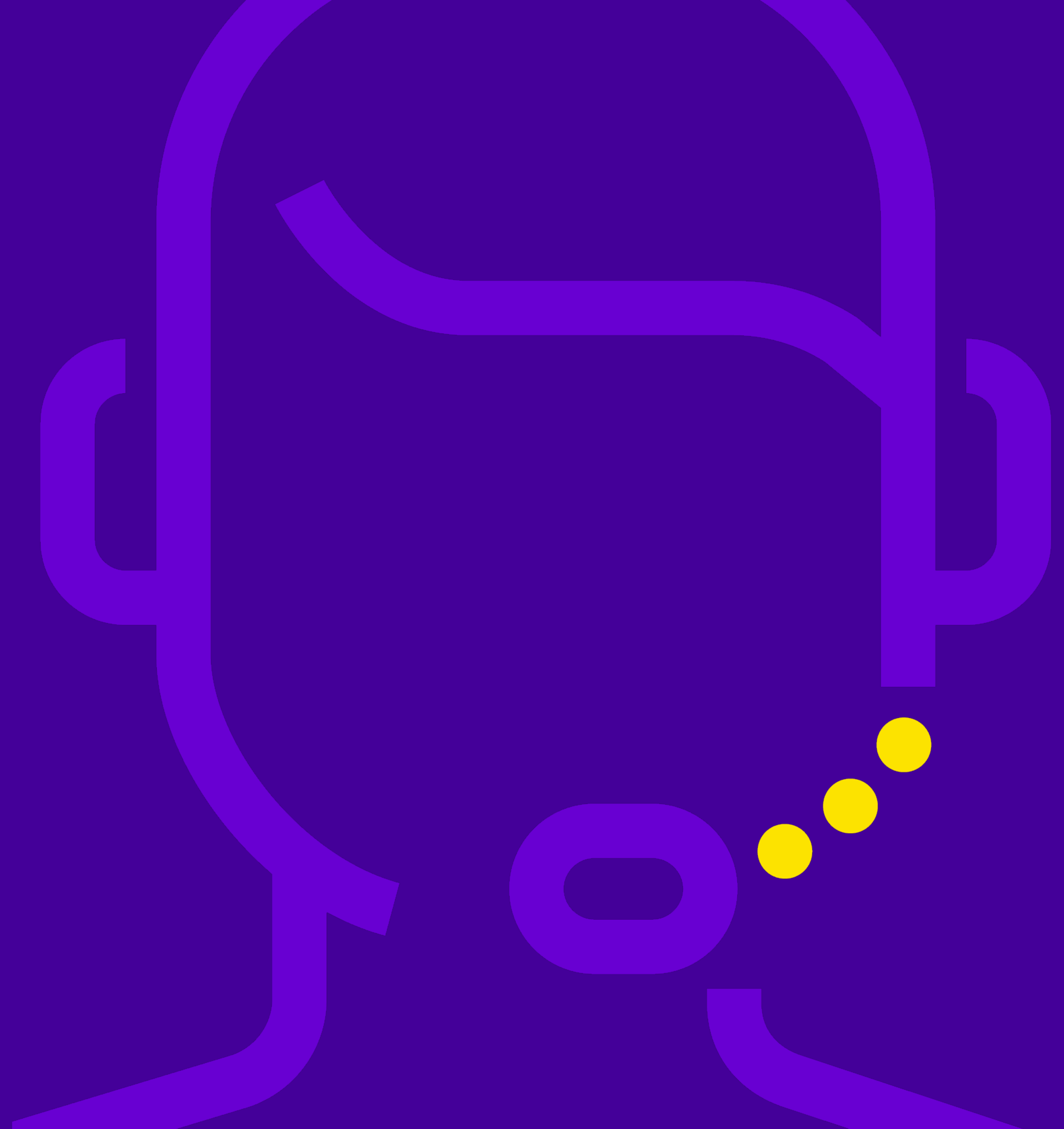
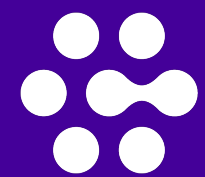
- Develop channel to continue to capitalise on the transition to cloud-based applications and services

# Capabilities

- Wider range of conversation mechanisms
- Wider range of integrations
- Supporting hybrid working
- Delivering more automation and intelligence
- Packaging customer experience improvement capability

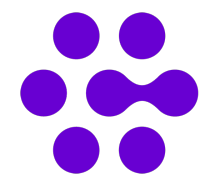
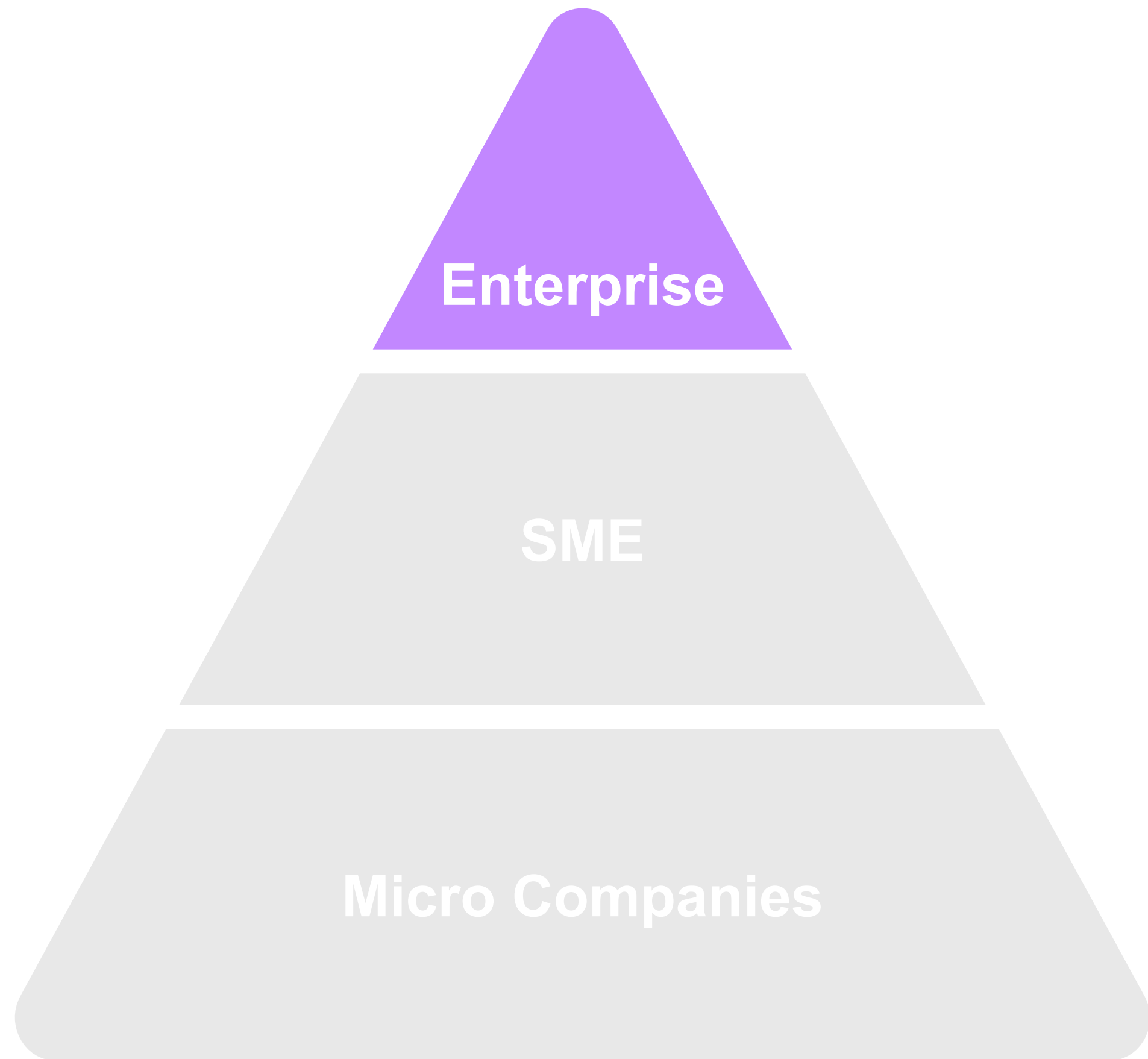
Market Segmentation  
and Product Portfolio

**Enterprise and  
Public Sector**

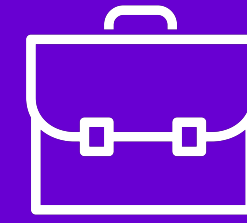


# Enterprise customers are focussed on maximum impact for the solutions they use

## Enterprise and Public Sector



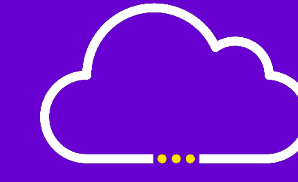
## Market Segmentation and Product Portfolio Enterprise and Public Sector



8k

Businesses

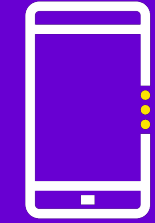
1% of UK



2m

Cloud comm seats

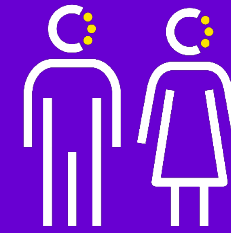
30% of UK



3.4m

Mobile lines

30% of UK



11m

Employees

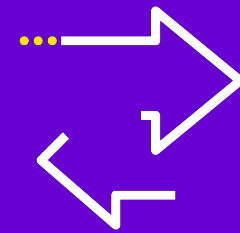
40% of UK



0.29m

Cloud contact centre agent seats

60% of UK



0.7m

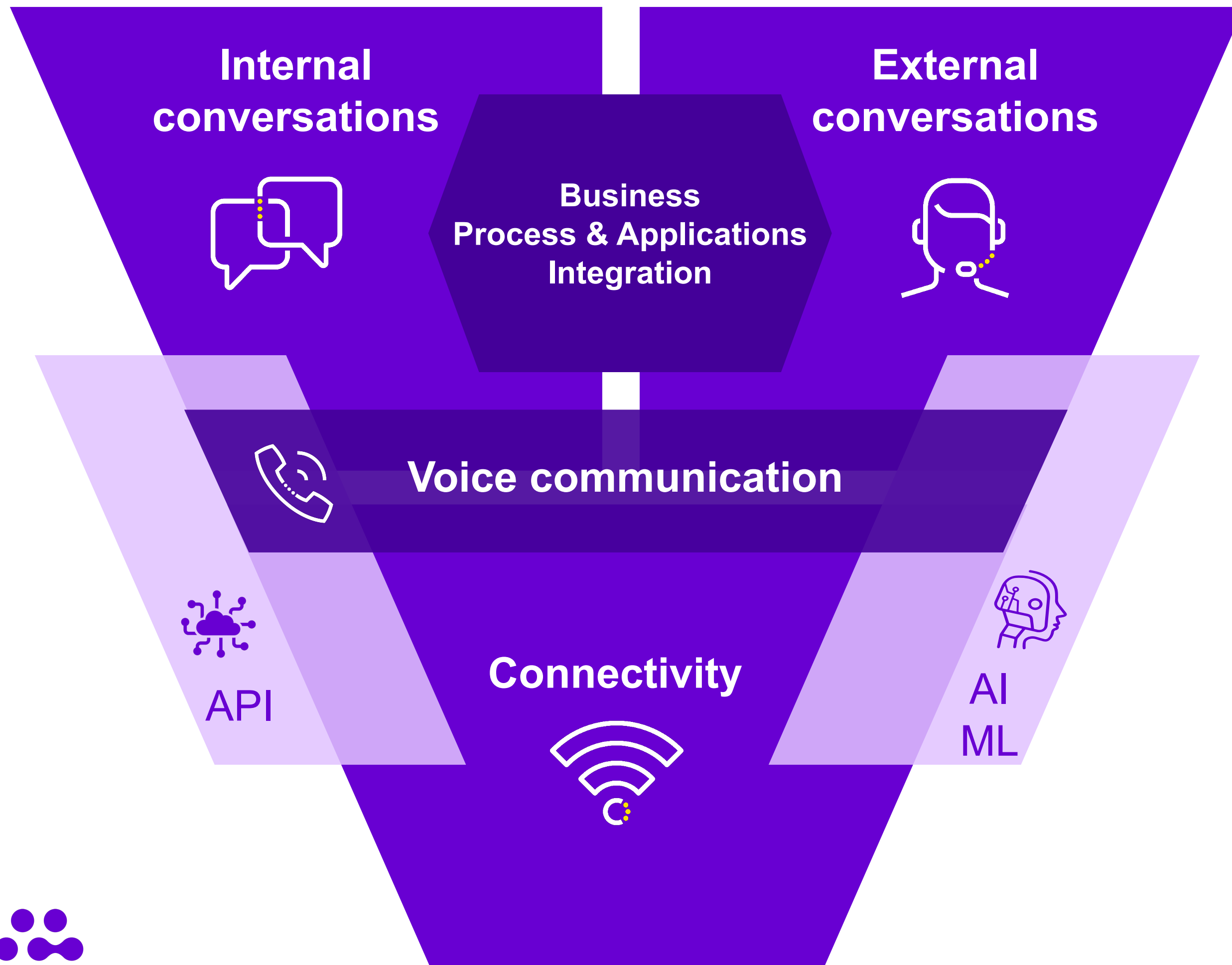
Fixed access lines

20% of UK

- Customers increasingly focussed on their customer experience
- Often highly bespoke implementations
- Requirement for future proof capability

# Problems we solve in the Enterprise and Public Sector market

## Customer needs and Gamma's offering



### Cloud Telephony

#### SIP

#### VoIP

- Internal calls
- PSTN calls
- Desk phones, Headsets

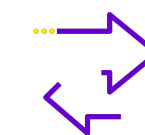
#### Call control

- IVR, extensions, greetings
- Hunt groups, queues



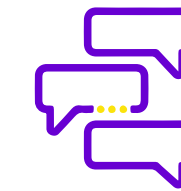
### Mobile

- 5G
- 4G
- Wi-Fi Services



### Fixed

- Broadband
- Ethernet
- WAN Services



### Collaboration & Meetings

- Voice conferencing
- Video conferencing
- Messaging (Instant, persistent...)
- Screen-share & co-browse
- Share files



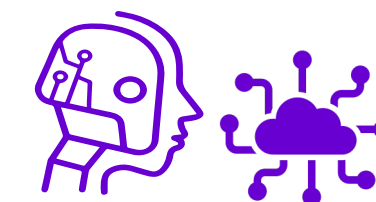
### Conversation Management

#### Omni channel communications

- Webchat, Social Media, Email, SMS
- Voice & Video

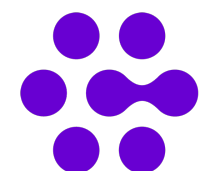
#### Call recording

#### Card payments (PCI DSS)



### Insights & Automation

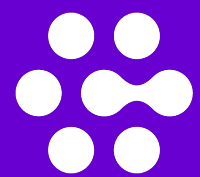
- Analytics and reporting
- APIs
- Automation through AI/ML





# SmartAgent

The Contact Centre reimaged



## Delivery to market

- Mixed model, driven by customer preference and behaviour
- Focus on service and delivery drives differentiation
- “Land and expand”
- Continue to review routes to market as required

## How we win

- Focus on the customer and their need
- Ability to combine core capabilities and deliver in a managed service wrap
- Inclusion of third-party elements as required
- Growing relationships with key channels and market participants

**Focus on total service delivered**

**Flexibility** in combination of components that can be delivered

# Competition

- Application vendors increasingly competitive in this space
- Completeness of Gamma offer means we often win on at least some aspect of each deal

# Market change

## Global hyper-scalers

- Amazon, Microsoft, RingCentral and other tech vendors increasingly targeting this segment
- Gamma has a strong presence in the growing CCaaS space where Amazon Connect is gaining material traction and momentum



# Future direction

## Markets

- Evolving the capability to deliver more packaged solutions that support more efficient delivery
- Creating a more seamless experience across the range of conversations served

## Capabilities

- Ensuring that the whole portfolio continues to extend and expand (SD-WAN, Mobile, CX improvement)
- Delivering more automation and intelligence
- Packaging customer experience improvement capability



# Agenda

Capital Markets Day

10<sup>th</sup> June 2021

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**01.** **Introduction**  
Andrew Taylor

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**02.** **2023 Strategy and the Growing Opportunity**  
Andy Morris

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**03.** **Market Segmentation and Product Portfolio**  
Chris Wade

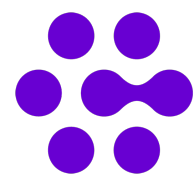
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**04.** **Wrap-up**  
Andrew Taylor

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**05.** **Q&A**  
Andrew Belshaw & Andrew Taylor

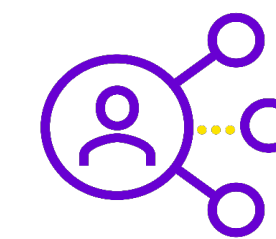
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# Wrap up



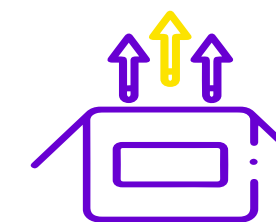
**Successfully executing** against our 2023 growth strategy – **profile of our business has changed substantially** after our acquisitions



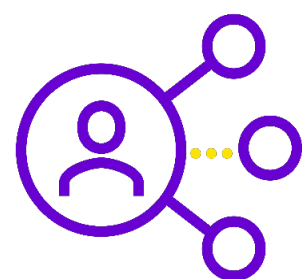
We now address **all segments of the business market** (Micro, SME, Enterprise and Public Sector) with their **cloud communication and connectivity needs**



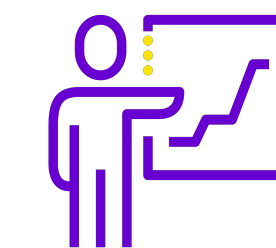
**Positive long-term market outlook**, with the future adoption of cloud services forecast to increase across all markets



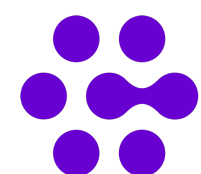
Significant progress in our **technology and product strategy** with an **exciting portfolio and roadmap** of new product launches



Very clear **Go To Market model** which is driving **multiple product and channel opportunities** across the business segment



Next **Capital Markets Day presentation** scheduled during **Q4 2021** with a focus on our **European businesses**



# Q&A

- Join the Q&A session through the **Microsoft Teams link**
- You can **ask your question live**
- It will be **20 minutes** facilitated by **Andrew Belshaw**





**Thank you.**