

Mobile Email Momentum Challenges and benefits for the mobile inbox

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RESEARCH NOTE:

The primary research data upon which this report is based was derived from an independent study conducted by Quocirca and sponsored by O2, carried out in the first quarter of 2005. This involved 240 interviews of those responsible for or actively involved in managing their organisation's relationship with mobile operators from a broad cross section of industries in the UK, Germany, France, Benelux, Spain and Italy. Approximately 40% of the respondents were from €1 billion plus turnover Enterprises with the remainder in the €100m to €1 billion range. Other sources of data are highlighted where they are used.

Email has grown rapidly through open Internet standards and the proliferation of laptops and personal computers. When Canadian company RIM combined cell phone ubiquity with two-way pager simplicity in the BlackBerry, mobile email evolved from laptop connection to encompass a more portable form factor. The BlackBerry appeal is broad, if not yet deep, but the real value to business comes when mobile email is combined with other applications, turning BlackBerry into a mobile platform and bringing it head to head with incumbents like Microsoft.

KEY FINDINGS

- **The BlackBerry effect – creating a new category**
There has been a significant effect created by BlackBerry, with a third of those surveyed being BlackBerry users, and almost 60% of the non-users having a view of its worth. Whilst there are a number of alternative mobile email solutions, the comparison is always with BlackBerry – it has defined the mobile email market category and sets the standard for functionality.
- **Mobile email now has the potential for mass-deployment**
There is a growing business email culture and a strong mobile phone penetration across Europe and so it is no surprise that notwithstanding cost, size and battery life considerations, almost 70% thought mobile email might become a standard feature to roll out to all mobile phone users. This creates challenges as well as opportunities for mobile email.
- **Options create uncertainty, as standards have yet to emerge**
The simplicity of the total BlackBerry solution is diluted when other options are considered. The BlackBerry Enterprise Server and native Microsoft Exchange connectivity were equally regarded as standards. However this belies the fact that BlackBerry installations will have been hard fought and justified, whereas many businesses would adopt a Microsoft-centric view more by default for their in-house solutions.
- **Smartphones have yet to make their mark**
When asked about current wireless email pilots, smartphones of all types accounted for less than 25% of devices, with the PDA formats of the traditional BlackBerry and Windows Mobile devices each more than double the nearest smartphone, the BlackBerry 7100. The outlook is much the same, with few believing narrow smartphone form factor devices will be deployed in 2005.
- **Mobile email devices might be a platform as well as catalyst for other mobile applications**
Almost 54% of BlackBerry users felt it a suitable platform for a broader wireless application strategy, but non-users felt it more limited. User perceptions and comfort play important roles in extending any service, and familiarity with the simplicity of mobile email service has had an impact on the receptiveness to further capabilities.
- **Businesses intend to extend mobile functionality to other applications**
Almost 60% are active or becoming active with mobile access for professional users and almost 50% with mobile access to systems such as service management, inventory and logistics, and from our earlier research, it is in these application areas, rather than simply email, that many business cases are often easier to make. The mobile office, not simply mobile communications, is the ultimate justifiable goal.
- **Cellular connectivity extends the value of laptops**
When looking at deployment intentions for professionals, 70% still plan to deploy 3G/GPRS cellular cards for laptops. While small mobile devices have an instant communication appeal, there is still a need for a tool for more intense working, and a strong existing investment in laptops. Wi-Fi is fast becoming a standard feature of laptops, and cellular further extends the wireless connection appeal.



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1 Thinking about investing in Mobile Email?

Mobile email has suddenly risen to prominence, not only as a corporate tool, but with the unrelenting expansion of Internet access combined with mobile handset penetration, as a tool benefiting the individual. Email gadgets have become fashionable devices to own, with even the popular and national press bringing stories about the latest 'must have' technology.

The business case has been less clear cut. At executive levels where the cost can be self-justified, often now on the basis of "I must have a BlackBerry to show my status", adoption is higher, but as yet mobile email is under-exploited by the broader available user community.

The aim of this report is to look at the thinking behind the growth of mobile email, and where this will lead. As background, 240 managers in larger organisations with responsibility for, or active involvement in, the relationship with mobile operators were interviewed (see Appendix A).

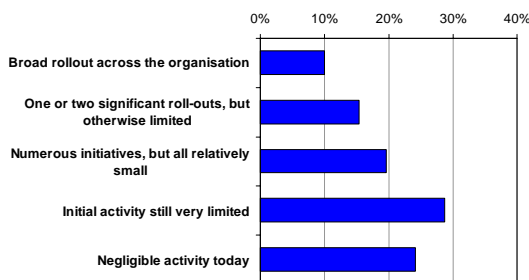
The report examines the challenges involved in the deployment of mobile email, and where businesses should focus their efforts to justify the investments required.

This report is intended to be read by those with responsibility for the deployment of mobile applications, and those whose companies are investigating the potential for mobile email.

2 Today – spread thin and wide

Despite the clamour in the industry, and most mobile operators offering a number of mobile email solutions, the reality is conservative (Figure 1). Few organisations have a broad rollout, but a total of over 75% have some initiatives in place.

Figure 1
How would you describe the degree to which mobile email (on handhelds) has been rolled out across the organisation as a whole – as of today?

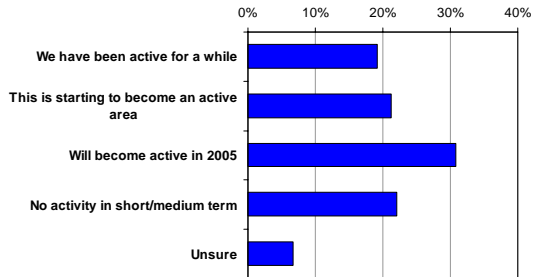


In comparison to the total number of mobile phones and PDAs in use today, the number of devices supporting regular usage of mobile email is small, even taking into account all dedicated mobile email devices and mobile email software licences on general purpose handhelds.

However access to email on the move has been on the rise for some time, as more are making use of wireless hotspots and cellular data cards in their laptops while out of the office,

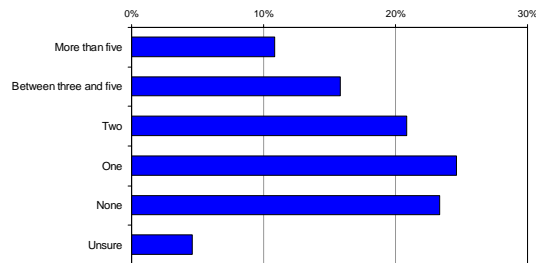
and making use of remote access to corporate systems from home, hotel rooms and conferences. Almost one in five respondents had existing experience of remote access, and an additional 50% see this becoming an increasingly active area (Figure 2).

Figure 2
How active is your organisation in the use of wireless to provide employees with remote access to corporate business systems and other services?



A single simple mobile solution is rarely an option for any company, and new devices, such as mobile handhelds or smartphones only compound the challenge. Evaluating a solution requires a comprehensive live test of software, devices and service, and compounds the need to undertake a range of pilot projects (Figure 3).

Figure 3
How many wireless email or general wireless remote access pilots or projects are you aware of across the organisation?



This is not solely due to complexity, as differing user needs are also being assessed in pilots, but this is an immature market, so both handsets and software architectures are still evolving. It is therefore important to use pilot projects as guides to proof of concept and justification rather than simply stepping stones to a broader deployment. A decision to deploy mobile devices should not be taken lightly.

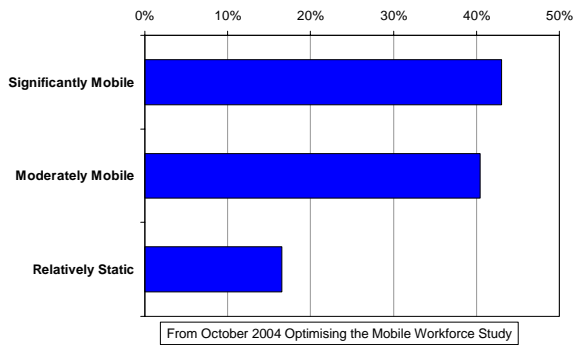
Often a reason for multiple pilots is the different commercial interest of the various functions and independency of functional IT organisations. This means some overlap and perhaps reinvention of the wheel, so companies will benefit from sharing experience internally. On top of this there are national and regional differences in technologies offered. These need to be fully understood and taken into account when extending a deployment.

3 Drivers for growth

The growth in interest in wireless working has been a consistent feature seen in previous Quocirca studies¹ (Figure 4). Many roles have always required employees to be

mobile, but the automation of many business processes within IT has forced these employees to return to the office to access the systems. Mobile phones liberated voice communications from this constraint, and other forms of remote and wireless access have a similar effect on data.

Figure 4
Overall, how would you describe your workforce in terms of level of mobile working (e.g. on the road, in the field, etc)?



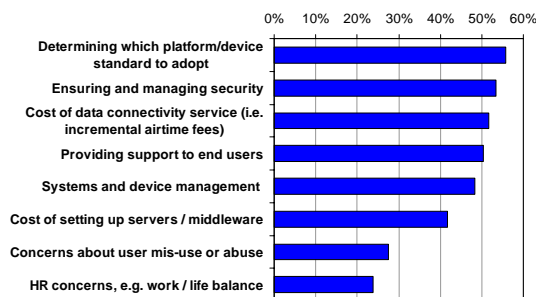
This is partly driven by specific business needs – a sales person needs to visit customers, an engineer needs to travel to site to fix a broken component – and in part from a growing need for increasing general flexibility and productivity across a business. Employees as a whole are becoming more mobile, and need to communicate with each other, and still require remote access to the office IT infrastructure.

4 Obstacles to overcome

The main obstacles to further deployment are based around impact on the business infrastructure and impact on the individual (Figure 5).

Businesses don't want to be locked into a narrow solution that is expensive to manage and makes the business more vulnerable. Users want something that fits their work style, and probably their lifestyle, especially if there is an expectation of being available to be contacted anywhere or at anytime.

Figure 5
What are the challenges when considering broad mobile email access from phones and other handhelds across the workforce?

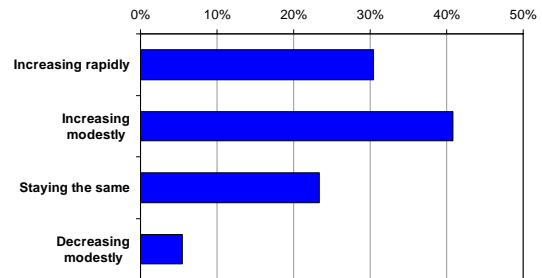


4.1 Costs

Spending on mobile airtime is increasing, and many companies feel that mobile communications have a larger

impact on their budgets than fixed telecommunications. Whilst this may or may not be true in reality, the perception is clear, and the high cost of mobile phone calls, both nationally, and when roaming internationally, raises an objection, especially when average spend per user is seen to be increasing (Figure 6).

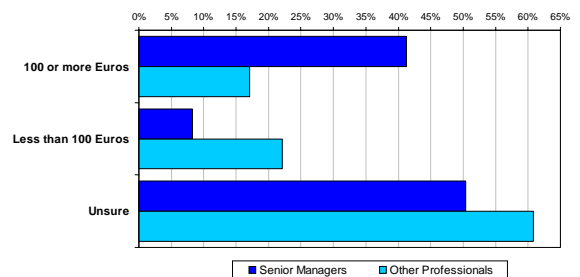
Figure 6
How would you say the average spend per user on mobile telephony is changing? (services costs as opposed to handsets)



Part of the problem is the difficulty in imposing control and setting limits. When data is available over an 'all-you-can-eat' connection in the office or over broadband at home, users become accustomed to using the facility without regard to the cost of transporting each megabyte. The actual costs of provision are seldom made clear to employees.

Setting an acceptable data tariff is then likely to be based on seniority of the individual user rather than need, but in reality most are unsure what usage cost limits are appropriate to set (Figure 7).

Figure 7
Mobile professionals have many ways to connect ... what would you regard as the average upper limit in terms of total monthly connection fees for the following types of user? (not including voice calls)

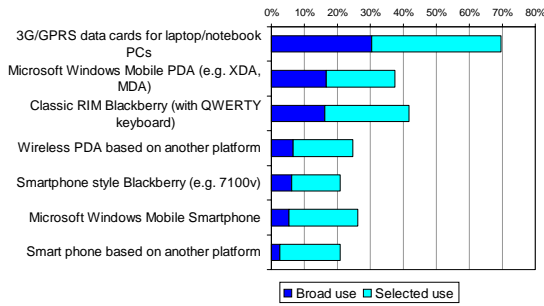


4.2 Device options

Despite major pushes from smart mobile handset vendors to gain acceptance and PDA vendors keen to protect their turf, the mobile device carried by most business users in addition to their phone is a laptop.

Mobile data cards for laptops, whether GPRS or 3G are clearly of value to users and worthwhile investments for the business. The incremental cost of a card is low for users who already have a laptop, and as most now come with Wi-Fi, mobile laptop connectivity is becoming more pervasive (figure 8).

Figure 8
How extensively do you think the following types of device will be deployed by your professional user community during 2005?



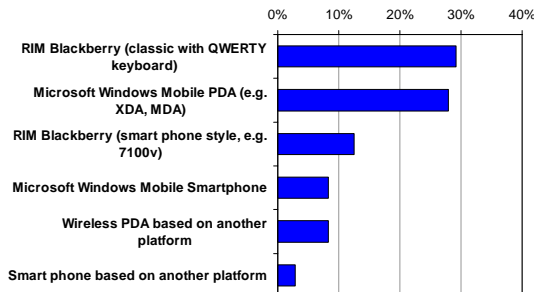
The challenges and issues for deploying and supporting laptops are well known, and remote access policies will have been tried and tested over dialup lines and access from home networks. Security, whether physically for the device itself, VPN connections, or anti-viral protection is relatively well understood on Microsoft Windows-based laptops, especially compared to smaller form factors and more exotic operating systems.

PDAs and smartphones have yet to have their internal security seriously challenged and compromised, but the increasing numbers being deployed, combined with their small size and ease of being mislaid, makes them more vulnerable to loss or misuse, increasing the management challenge.

Adoption of smaller form factor devices will continue to rise as their incremental cost drops and confidence in their security grows. The first dedicated email device, RIM's BlackBerry, massively increased awareness of mobile email and this will support growth of both further styles of BlackBerry, and the other networked PDA and smart phone devices.

The problem is that there are a number to choose from, each with different operating systems, user interface models and compatibility to current enterprise systems (Figure 9).

Figure 9
Have you implemented or are you piloting wireless email using any of the following devices?



BlackBerry clearly has strong market awareness, but was seen early on as the expensive gadget for the busy executive, whereas Microsoft's platforms can be characterised as the default business workhorses. In both cases, the PDA format is most prevalent, but other PDA platforms, including Palm tend not to appear on the enterprise radar. The PalmOne Treo

smartphone is a capable mobile connected device, but has yet to make its mark.

This is not good news in particular for the Palm companies. Palm devices have tended to find their way into businesses through the back door of individual users who connected them to their own desktops. This is not commercial deployment, and is unlikely to have IT management support.

The enterprise exception for Palm is in specific vertical markets, where Palm's breadth of applications from its large developer community becomes a strength. This strength is less evident for general-purpose application integration, where most Palm-based solutions work at a personal level from the desktop, rather than being integrated on a multi-user level through enterprise servers.

It is also early days for all forms of smartphone, with little impact on deployments so far. This is not unexpected, as many of the smartphone form factors are designed to appeal more to a consumer audience rather than business.

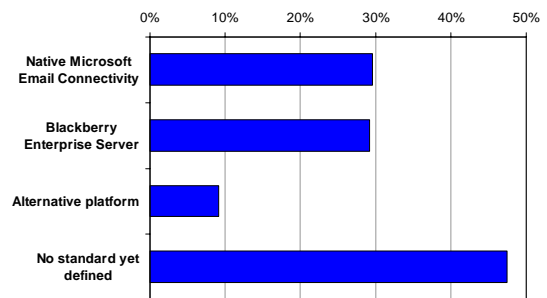
4.3 Infrastructure standards

While there are email standards for remote access, such as POP3 and IMAP, these are not best suited for the mobile email experience. Any mobile application must add mobility value to the business process role of the user, without increasing complexity. It must fit in, so that it replaces other alternatives. Mobile email should replace the need to return to the office to pick up email, and be as easy and timely as other alternative forms of mobile communication – voice and text. This means mobile email should appear on the handset without user initiation. There are a number of ways to accomplish this, and this is where the options diverge,

Existing enterprise email systems will be based around a number of standards, both de facto and de jure. Open systems standards such as X.400 and even SMTP have largely given way to Lotus Notes, and most widespread, Microsoft Exchange.

Mobile email systems must take these options into account, along with any device diversity, and provide a secure connection without major impact on the current infrastructure. A tall order, and to date, whilst there are a number of software companies offering email solutions, two dominate – BlackBerry Enterprise Server and native connection to Microsoft Exchange (Figure 10).

Figure 10
Which of the following would you regard as a standard for email connectivity within your organisation moving forwards?



Our research showed that neither of these options had a dominant position. It is likely that the Microsoft option has been selected as a default due to its strong position in the enterprise through the growth in acceptance of Exchange. The widespread user familiarity with Microsoft products on laptops also adds to the perception that Microsoft email connectivity should easily extend to all types of mobile user. However, the BlackBerry endorsement has been hard fought to win acceptance in the IT department, and this will make it hard to dislodge.

This position will undoubtedly change over time, as Microsoft has the capability to make mobile email a feature of its standard Exchange email platform. In the meantime, RIM has capitalised well on the BlackBerry advantages.

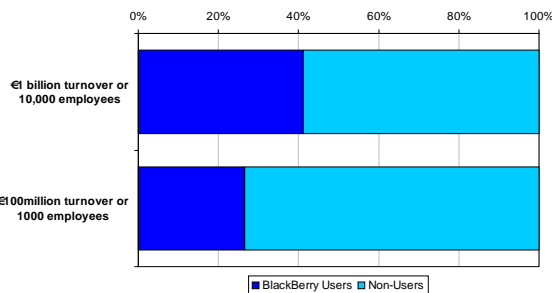
For the other mobile email software companies, including Visto, Intellisync, Good Technology and Seven, there is still an opportunity as the mobile email adoption grows. This will only happen if they can quickly establish a credible position between the enterprise default of Microsoft and the marketing momentum of BlackBerry.

The gap is not wide, and as recent consolidation of the players in this place has shown, time is of the essence, and effective routes to market, either via operators or direct to enterprises will have to be built rapidly.

5 The BlackBerry effect

Usage of the BlackBerry is widespread, as despite the limited number of companies with broad adoption of mobile email, a significant proportion indicated they were BlackBerry users, rising to over 40% in larger companies (Figure 11).

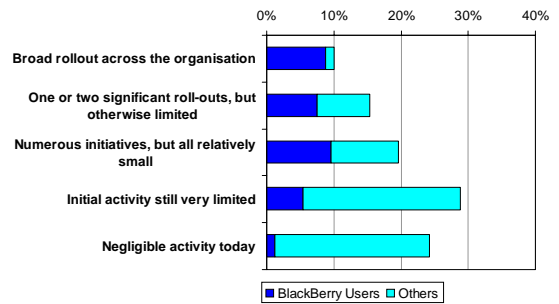
Figure 11
BlackBerry Users versus Non-Users – by Company Size



Success in North America, following its launch in 1999, caused a number of multinational companies to press for deployments in Europe. Since its launch in Europe in June 2001, against a backdrop of an existing high mobile phone penetration for business users, the BlackBerry has also sold well as an email complement to a mobile phone, if not always a replacement.

The simplicity of the BlackBerry end to end solution and ease of use inspired by the ‘push’ concept has made it acceptable to the most non-technical of users. The effect of this becomes more evident when looking at the BlackBerry usage footprint within the current levels of mobile email adoption, (Figure 12). BlackBerry dominates the existing broad rollouts of mobile email, and accounts for around half of significant and smaller deployments.

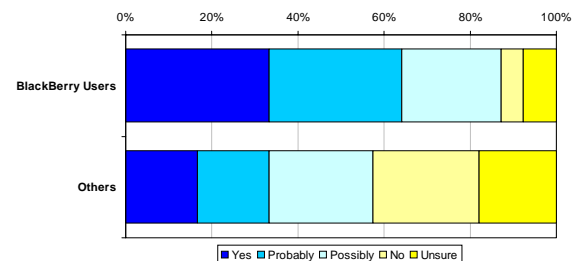
Figure 12
How would you describe the degree to which mobile email (on handhelds) has been rolled out across the organisation as a whole – as at today?



This is important because this solution will have been an uphill sale in many IT departments. It brings in a new piece of infrastructure to support, and raises important questions around security and integration to existing corporate email solutions.

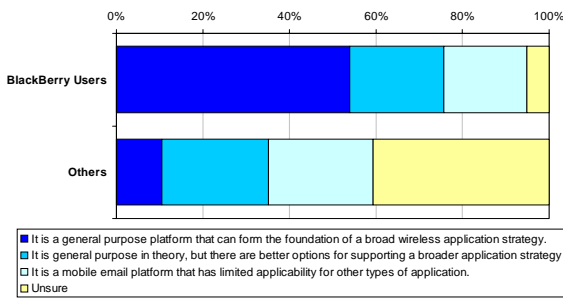
Part of the BlackBerry effect is to create a more positive view of mobile email, as almost 90% of those with BlackBerry already deployed consider mobile email could become a standard feature for employees (Figure 13).

Figure 13
As the traditional mobile phone evolves to incorporate email capability as standard, with minimal impact on cost, size and battery life, do you envisage a time when wireless email will be a standard facility you offer to all or most mobile phone users?



The significance of this BlackBerry effect is increased when looking beyond mobile email (Figure 14). Experience with BlackBerry clearly builds the belief that the devices can be used to provide the basis for a broad wireless application strategy.

Figure 14
What is your perception of the RIM Blackberry solution?



Whilst the reality is far more complex from a technical perspective and the level and breadth of support for application development is somewhat limited for the BlackBerry as a general purpose platform, it does pose a challenge to other mobile device solutions.

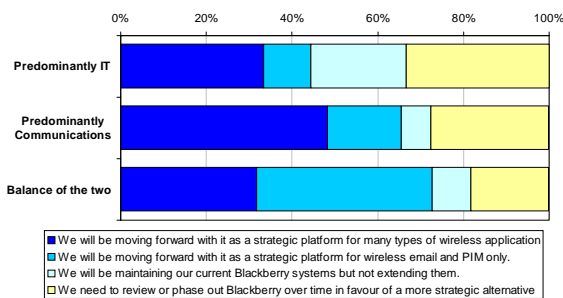
6 Conclusions and next steps

Mobile email seems like a discrete investment in a solution that has little impact on the rest of the business, but it extends mobile communications into the complexities of IT. Information access has to be kept secure, device access options have to incorporate a diversity of users, and user support has to be kept simple.

How far these areas of IT and communications are combined might help determine the best route to take. Research over recent years has indicated that responsibility for communications is becoming more closely aligned with, and under IT. In this latest research, respondents divided almost equally into three groups – predominantly IT, predominantly communications or a balance of the two.

The relative importance attached to BlackBerry as a future all-embracing platform is affected by the viewpoints and industry backgrounds of those surveyed (Figure 15).

Figure 15
If you use the RIM Blackberry platform now, what are your plans for it in the future?



From an IT or balanced perspective, BlackBerry is seen more as a point solution to a single problem, but not necessarily the final solution to build an entire mobile strategy. Those with a predominantly communications viewpoint are not as aware of the broader IT needs of the business, and so think that building on the simplicity of the BlackBerry solution will be more widely acceptable. They also have a closer

perspective of the value and simplicity of a cellular data connection – worldwide access from roaming on a single contract – which helps keep the BlackBerry solution simple.

Mobile technologies should not be viewed as an end in themselves, but as a way to extend the services of the business. A business’s investment plans for mobile devices should be based on its overall strategy, and not on the point whims of individuals.

Decisions taken on picking one flavour of mobile email device rather than another have a greater significance than simply email, and should really be taken as part of a larger strategy for how mobility expands the use of IT in supporting the business, and not as a separate adjunct on the side.

The question of finding a solution for mobile email is not one of selecting one style of devices over another, or buying into one vendor’s server solution or another. The important question is whether mobile email is purely an extension of user communications or an extension of the IT infrastructure. This will depend on the end goal or company’s strategy – extending the business to the employee, or extending communication to the employee. Both directions are valid, but they have different milestones along the route.

In the meantime, alongside the high profile BlackBerry deployments, there are large numbers of laptops gaining wireless connectivity and IT departments are going to have to cope with an increasingly diverse range of requirements for the foreseeable future.

6.1 Acknowledgements

This kind of research is crucial to all of us in the business and IT community - suppliers and customer organisations alike. We would therefore like to thank all of those participants who contributed so generously, with patience and good humour, towards a better understanding of issues in this important area.

6.2 Reference

	<i>Title</i>	<i>Published</i>
1	Optimising the Mobile Workforce	Quocirca Ltd 2004

Appendix A – Interview Sample Distribution

Figure 16
Respondents by Country

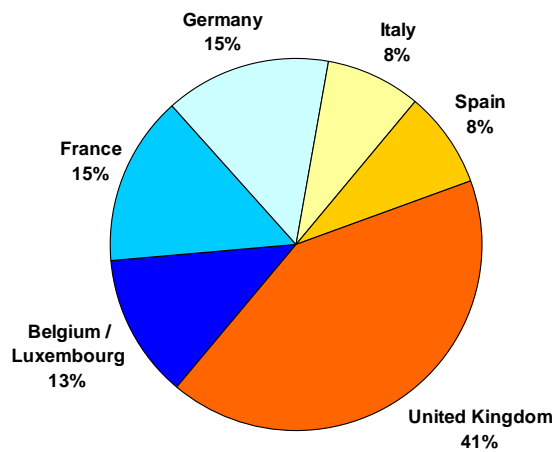
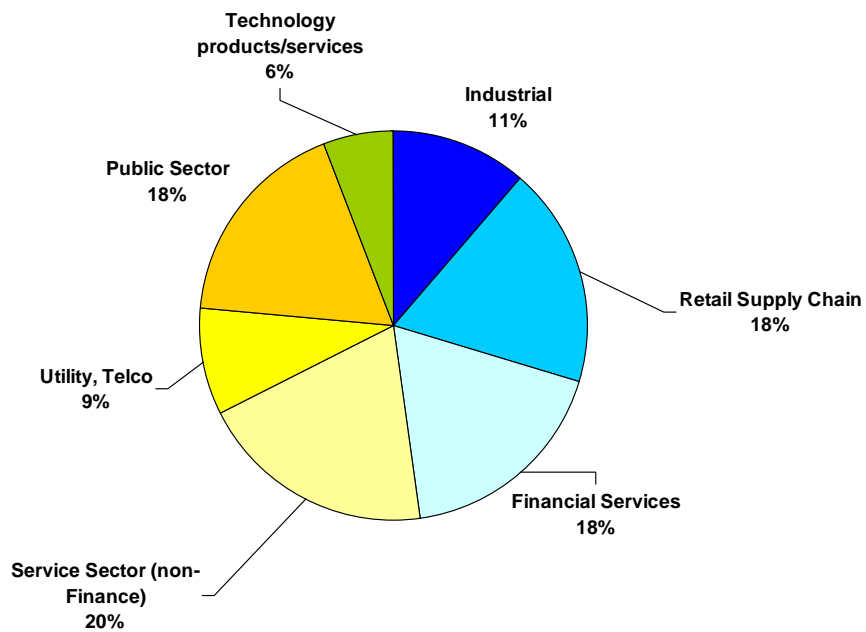


Figure 17
Respondents by Industry



About O2

mmO2 is a group of companies providing mobile communications services in Europe.

It has developed a strong presence in high-value markets through the provision of mobile data and internet services. By 30 September 2004, the business was serving 22 million mobile customers in the UK, Germany, Ireland and the Isle of Man.

The combined group turnover for the year ending 31 March 2004 reached £5.646 billion, up 22% from the preceding year. Group turnover for the half year ending 30 September 2004 reached £3.285 billion. Data represented 21.9% of the total service revenues in the quarter ending 30 September 2004.

mmO2 was the first company in the world to launch and rollout a commercial GPRS (or 2.5G) network and has secured third generation mobile telephony ("3G") licences in the UK, Ireland and Germany.

September 2001 saw the launch of the group's new consumer brand, O2. Encouraging brand understanding will help to reinforce a consistent vision and strategic focus across the group.

Starmap pan-European mobile alliance

To strengthen its international orientation, O2 has joined the Starmap Mobile Alliance, a union of eleven leading mobile operators. The Starmap Mobile Alliance provides seamless, enhanced voice and data solutions for businesses and consumers when travelling across Europe. Reaching over 53 million users, the alliance allows O2 to collaborate in the fields of technology, purchasing and sales. The alliance includes only one representative per country, which eliminates the complexities that can arise with multiple in-country partners.

Starmap aims to drive revenue growth by being quick to market with new and innovative cross-border products and services. Starmap members' customers can already benefit from GPRS and MMS roaming, as well as access to familiar services such as voice-mail and short-code dialling whilst travelling in other alliance countries. Flat-rate roaming tariffs for corporate customers have been introduced in a number of territories. Starmap also aims to deliver operating efficiencies for members, who are currently collaborating on initiatives in the areas of sourcing, technology, and sales to large corporate customers.



About the EVUA

Formed in 1992, the EVUA, a non-profit user organisation for large multinational companies, has evolved into an effective organisation which promotes global networking solutions for multinational companies. Continually striving to make the communications market more competitively priced for the business world, the EVUA also gives its members a voice in legislation and the opportunity to gain inside knowledge on the latest developments in the telecoms world.

Our membership includes companies from Europe, USA and the Far East; The majority of them being Global 500 organisations. Our agenda has also evolved. The EVUA is now a global telecommunications focus group examining the network service requirements of multinationals and driving the marketplace to deliver these at competitive rates. To achieve this we address issues as diverse as enterprise network services, managed services, outsourcing, mobility, IP and conferencing.

Working for its Members

Businesses rely on their communications and networking facilities more than almost any other facet of their organisation. It is what enables them to talk to their clients, manage their employees and find and foster new business. It will inevitably, therefore, form a significant part of their organisational structure - spanning countries and continents, and many thousands of employees.

Choosing the right system, implementing it successfully and maintaining it effectively is therefore essential. To help them pick their way through the murky waters of communication management, the EVUA offers a wealth of knowledge and experience.

This includes:

- An opportunity for IT and communications managers to meet and network with their peers from similar companies and discuss issues of common interest in an informal and secure environment
- Expert advice on international services, including RFPs, SLAs and contracts
- Benchmarking and service management reports covering IP, mobile and voice
- Participation in Special Interest Groups (SIG), where members work together to develop common standards and approaches
- A lobby group to ensure that the voice of business is heard on all key issues
- A service development forum with suppliers, to build relationships and ensure that service provision is delivered according to corporate needs
- A user club which provides a forum to ensure members are kept abreast of developments in their field and can discuss and share ideas by email and teleconferences
- Long established relationships with INTUG, Yankee Group, Gartner, Ovum, PBI media and, of course, Quocirca.
- A recently established partnership with Watson, Farley and Williams, a leading corporate telecommunications legal adviser, who works with the EVUA in supplying expert legal advice on contracts

Whilst the EVUA has a close working relationship with vendors and service providers, it is an entirely independent organisation with no vested interests beyond those of its end user members.

EVUA Events

The EVUA holds three conferences each year and a number of one day workshops on subjects ranging from mobile working to IP, from conferencing to outsourcing and managed services. Attendance at these meetings is restricted to EVUA members and guests of the EVUA board. These meetings provide a unique opportunity for representatives from multinational companies to discuss developments relating to the key issues that face them every day. Special Interest Groups are open to all members and meet on a regular basis.

Membership

For more information on the EVUA or to enquire about becoming a member, please visit www.evua.org.uk or call the EVUA secretary on +44 1293 548 260



About Quocirca

Quocirca is a research and analysis company with a focus on the European market for information technology and communications (ITC). Its analyst team is made up of real-world practitioners with first hand experience of ITC delivery who continuously research and track the industry in the following key areas:

- Business Process Evolution and Enablement
- Enterprise Applications and Integration
- Communications, Collaboration and Mobility
- Infrastructure and IT Systems Management
- Utility Computing and Delivery of IT as a Service
- IT Delivery Channels and Practices
- IT Investment Activity, Behaviour and Planning

Quocirca research is always pragmatic, business orientated and conducted in the context of the bigger picture. ITC has the ability to transform businesses and the processes that drive them, but often fails to do so. Quocirca's mission is to help its customers improve their success rate.

Quocirca has a pro-active primary research programme, regularly polling users, purchasers and resellers of ITC products and services on the issues of the day. Over time, Quocirca has built a picture of long term investment trends, providing invaluable information for the whole of the ITC community.

Quocirca works with global and local providers of ITC products and services to help them deliver on the promise that ITC holds for business. Quocirca's clients include Morgan Stanley, Oracle, Microsoft, IBM, CA and Cisco. Sponsorship of specific studies by such organisations allows much of Quocirca's research to be placed into the public domain. Quocirca's independent culture and the real-world experience of Quocirca's analysts, however, ensures that our research and analysis is always objective, accurate, actionable and challenging.

Most Quocirca research reports are available free of charge and may be requested from www.quocirca.com. To sign up to receive new reports automatically as and when they are published, please register at www.quocirca.com/report_signup.htm.

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The logo for Quocirca, featuring the word "quocirca" in a lowercase, sans-serif font. The letters "quoc" are in blue, "irca" is in red, and the "i" is in black.