

Soaring across the regions

A view of the impact of the internet on business

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The internet offers any business the opportunity to present a commercial image independent of the organisation's size and location. Small and medium sized businesses (SMBs) across the UK have exploited the internet as it has evolved from an interesting medium for the technology-aware to an essential commercial platform. With this increasing importance, and the internet's ability to extend the reach of a business, it is valuable to realise precisely what different internet service providers (ISPs) offer before buying. This includes evaluating service level and support capabilities and understanding how these vary throughout the UK.

- Across the UK, SMBs have embraced the internet**
Widely accepted as a fundamental business tool, the internet has moved far from its academic roots. While many companies in some of the more traditionally industrialised regions have gone online more recently, other regions with more rural expanses show a significant strategic commitment to the internet.
- New services and applications are playing a significant role**
Internet communications not only extend the reach for remote areas, many new applications also permit those based in locations where transport routes are congested to switch from physical travel to digital. This includes web and video conferencing, but also the use of e-commerce platforms to interact with suppliers, customers and partners.
- Internet connectivity has become vital for many, with reliability being an important issue**
While around a quarter of companies in most regions could cope for no more than an hour with no internet connection, there are a couple of regions where many companies still believe they can manage for over a day without it. Companies in most areas expect good service levels and look to providers with reliable reputations and business level support, but a significant number report connection performance dropping below what they would expect.
- Consumer applications have an impact in the workplace**
Companies across the UK are noticing personal internet usage by employees, often for domestic chores and general access, but also for social networking and instant messaging. In the main, a pragmatic view is taken with policies that allow use during lunchtime and outside working hours, but many have put in place access control and site/content monitoring technologies to keep personal internet use in check.
- Despite any personal use concerns, working from home is being encouraged**
Home working provides business as well as personal flexibility and seems to be more pronounced in areas where transport links are congested, and competition for staff is highest. Mobile phones and laptops are the main tools provided to support home workers, although in some regions employees are supplied with broadband connections and data cards paid for by the business.
- There is a simplistic view of the internet connectivity options available**
Knowledge about the differences in the range of options from ISPs is patchy. Despite companies in some regions suggesting there is no problem with the level of jargon in the industry, many in these same places struggle with their comprehension of internet service-related technical terms. This lack of understanding will have a business impact and affects the commercial relationship between ISP and SMB.

RESEARCH NOTE:

The information presented in this report is based on a survey of 345 organisations in the UK. It was completed in April 2008.

Those surveyed were from small and medium sized UK businesses, specifically organisations with between 10 and 250 employees.

Quocirca would like to thank all the respondents to the survey and thank Easynet Connect for sponsoring this research.

CONCLUSION: Now British SMBs have embraced the internet and rely upon it for increasingly sophisticated services, it becomes even more important to understand the different offers from providers and look beyond price to added value and regional support. This also places an onus on the ISPs themselves to differentiate their product options to demonstrate most clearly the benefits and business impact of their services, and how they intend to support customers across the UK.

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Introduction

This report looks at the degree to which small and medium sized businesses (SMBs) in the UK have taken advantage of the internet, and where they are facing challenges. In particular it looks at regional differences within the UK, although it should be noted the sample sizes in certain regions were small and so the conclusions drawn are based on a broad view of the results rather than specific details.

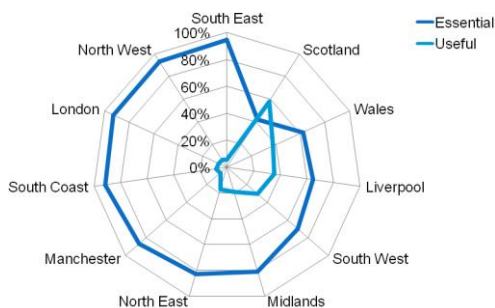
The research behind this report involved interviews with 345 UK-based managers with operational or commercial responsibility for IT and data communications. Each organisation employs between 10 and 250 workers.

Quocirca would like to thank all the participants for their time to take part in the telephone interviews from which the data for this research is derived and to thank Easynet Connect for its sponsorship of the research.

The focus of information technology (IT)

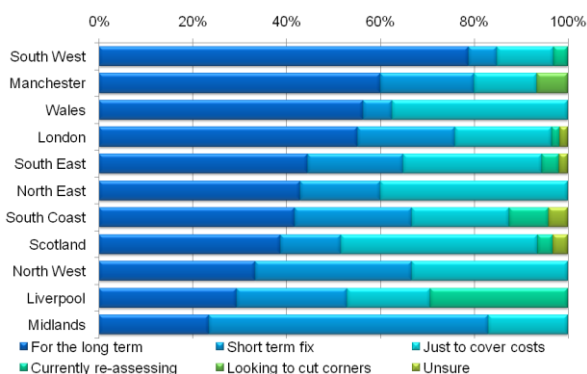
Businesses face many diverse challenges, which fall into three broad categories—uncertain risks, rising costs and new opportunities. Technology brings its own costs, risks and opportunities, and the overall value of IT to a business must be considered before an investment is made. While SMBs in many parts of the UK think IT investment is essential, it is not always the case (Figure 1).

Figure 1
Importance of IT in helping the organisation meet its business needs



Recognising the contribution of IT to a business makes investment in it a strategic decision for many, although significant numbers of companies in some regions still view IT as a tactical cost (Figure 2).

Figure 2
How is IT spending currently characterised?

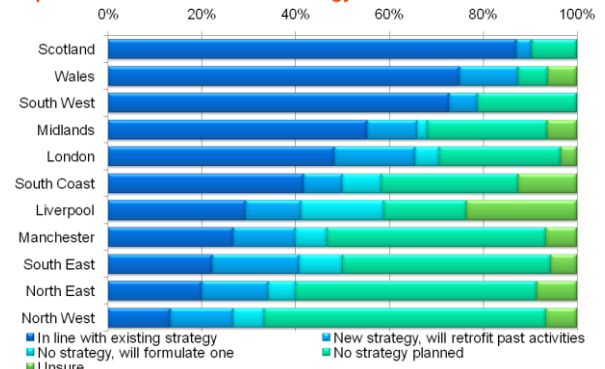


Connecting the SMB

Business use of the internet has rapidly become part of a longer-term strategy. What started out as a ‘connect to avoid being left behind’ message in the late 1990s survived the dotcom crash to emerge as a serious business commitment.

However, while many SMBs have a strategic approach to the use of their internet connection, this seems more pronounced in regions with large rural areas (Figure 3).

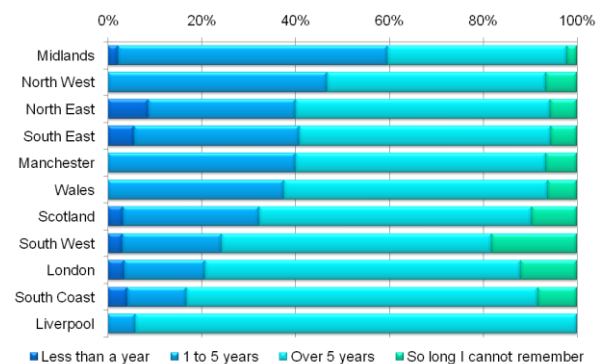
Figure 3
How is the commercial use of the internet being carried out as part of a formal business strategy?



Those lacking a firm strategy might find it fits business needs for the moment, but over time, as commercial pressures grow, the need to get the best out of online investments will become paramount. This is especially true for those that come to rely on internet connectivity to communicate with customers, prospects and suppliers and, increasingly, to enable their employees to work more flexibly.

While a third of SMBs have only embraced the internet in the last five years, by far the majority have been connected for some time. However, businesses in traditionally heavy industrial regions have lagged a little (Figure 4).

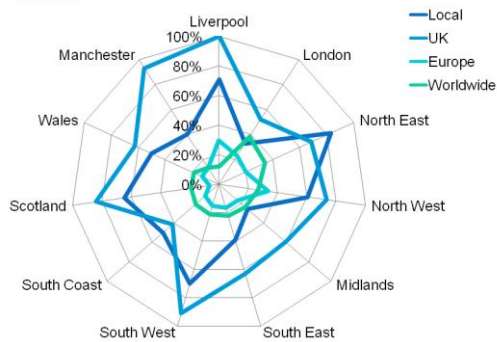
Figure 4
How long has the business had an internet connection?



However, the majority of companies have had many years of experience of using the internet. They now offer greater access for all employees to use the internet as a primary resource for information and communication, and for the business to link more directly and immediately to customers, partners and suppliers over any distance.

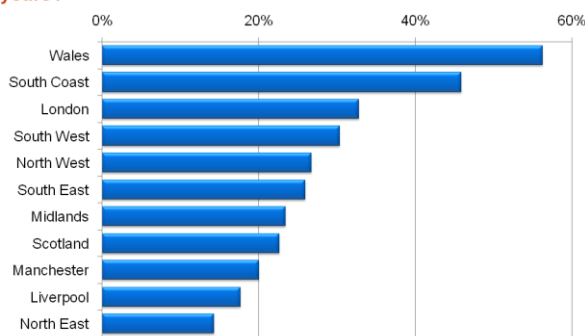
This reduces many of the advantages of reach that larger companies once enjoyed over SMBs, who can now more easily be part of wider national and international business communities, although for those in some regions, local and national customers are still the main focus (Figure 5).

Figure 5
Business regions addressed in terms of where customers are based or located



The internet support industry has grown rapidly with many more specialised internet service providers (ISPs) focused on business users, and differentiating themselves on price, service levels and value add. This has led to connection costs falling, and a growth in bandwidth or capacity. While overall churn between suppliers is fairly low, some regions seem to have seen significantly more changes in suppliers in the last two years than others (Figure 6).

Figure 6
Has there been a change of internet supplier in the last two years?



Any reticence in changing supplier can partly be explained by a desire to avoid upheaval in the IT department, and partly that the costs form a smaller part of the IT budget than many other line items. It also reflects the difficulty in really understanding how internet connectivity offerings differ among suppliers and what impact those differences could have on the business. The ISP industry has been maturing of late, with mergers and business failures and, in some regions this will have affected the available options for SMBs.

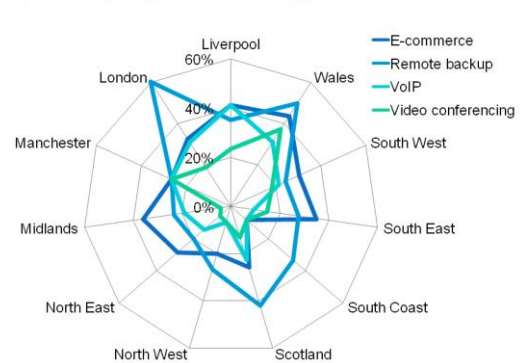
Impact of new services

The widespread availability and affordability of broadband has extended the market for permanent internet connection to both SMBs and consumers alike. This has enabled the world of e-commerce and other online services, as it can be assumed that a prospective customer base is now also able to be 'always online'.

Other internet-enabled applications, such as online order tracking, IP surveillance cameras and media downloading, have become viable as the availability of bandwidth capacity has led to more content-rich networked applications and data. Coupling the digitisation of all types of data storage and transmission, from off-site backups to video and phone calls,

with lower cost and pervasive high-speed connections has led to new uses of the internet (Figure 7).

Figure 7
How many are adopting new internet applications?



The reasons for such interest in new applications link back to the primary business needs. E-commerce extends the customer base beyond the confines of the local geography. Remote backup reduces risk by improving business resilience, and adds the flexibility of remote access and management of backup procedures. Voice over internet protocol (VoIP) telephony removes the need for separate voice and data networks, increases productivity by linking the making of calls to IT applications and can reduce call costs, or at least make them more predictable.

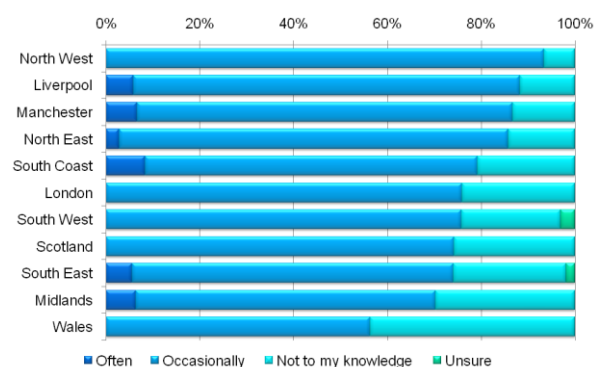
Even video conferencing, once thought of as expensive, specialised and difficult to use, is becoming more popular amongst SMBs and is also of growing interest as it reduces the need to travel, thereby saving time, cost and reducing environmental impact. Interest in this is not restricted just to remote areas but also places where travel is difficult or congested.

Reliance and dependence

This increasing use of sophisticated and powerful internet-based applications is not without risk. In particular, for those companies who come to rely on their internet connection for services such as telephony or customer sales, the stability and continuity of service then become essential.

While frequent failures of internet connections are not commonplace for UK companies, a great many have noticed occasional failures of their service (Figure 8).

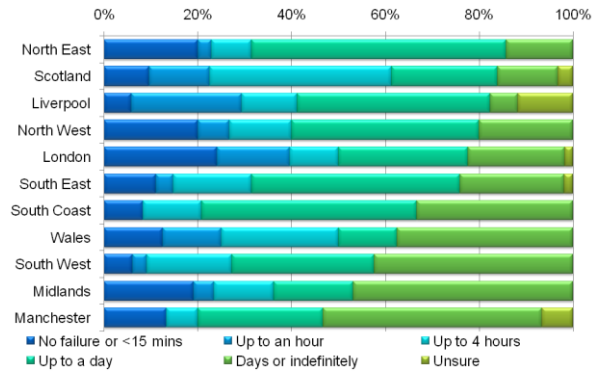
Figure 8
Has the business internet connection ever failed?



This type of gap in service could be catastrophic for a company reliant on the continuity of connection, but may not

be noticeable for those companies where the internet is really only providing a little extra visibility, or employee access. Many companies have already passed that point and, for the majority of businesses in most areas of the UK, a gap in service longer than the business day is a problem (Figure 9).

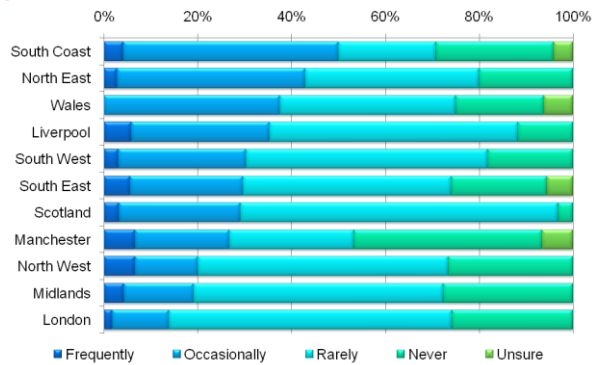
Figure 9
How long can the business cope with a failure of internet connection during business hours?



The internet has moved from something nice to have to a way to extend the business, and is now an integral and critical commercial platform. This has to be borne in mind when seeking suppliers and validating their offerings. Simply looking for lower cost or higher bandwidth at the same price will be false economy if the service fails.

If the connection failure is not total, the vagaries of the packet switched network, and how the ISP is connected to the rest of the infrastructure, might affect the performance of the connection periodically, and this is noticed by SMBs (Figure 10).

Figure 10
Does the internet connection drop below expected performance levels?



A more troublesome concern is how much or how often are customers, partners and other external contacts noticing the drop in service. To them it is not a technology problem but an issue that stops them getting on with their business—if communications are not working it is easy to take their business somewhere else.

Making sure the internet connection meets the business needs is therefore important not only for critical services and those companies dependent on their connection, but also for the external perceptions of all companies. The reality is that an internet connection is a more complex issue than simply speed and cost in megabytes per second. Thankfully most businesses recognise this—the main areas of concern overall are in getting the right level of business support (Figure 11), reliability of connection (Figure 12) and security of the link (Figure 13).

Figure 11
How important is the level of business support for an internet connection?

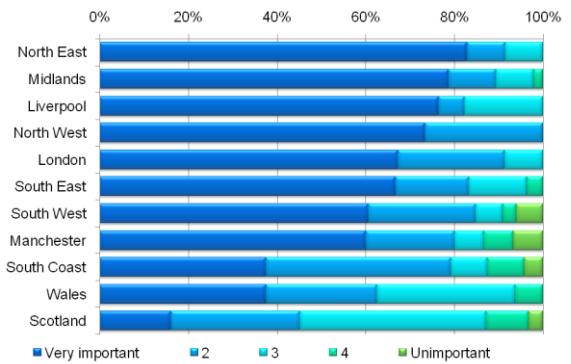


Figure 12
How important is internet connection reliability?

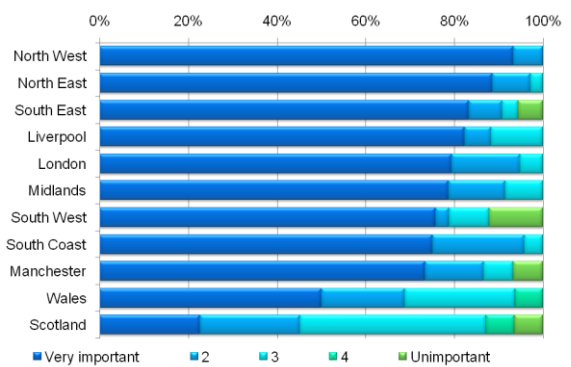
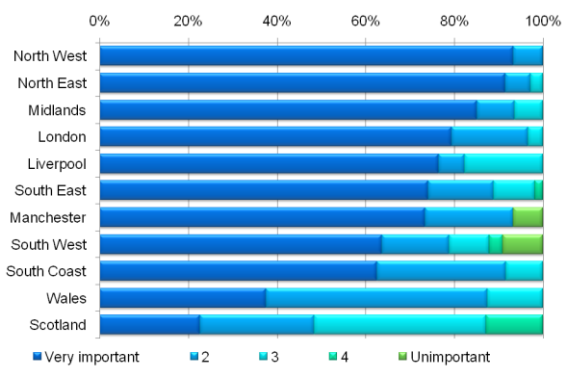


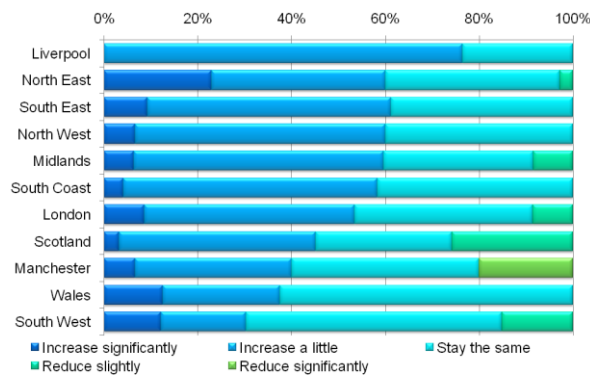
Figure 13
How important is a secure/private internet connection?



Jargon and confusion

On balance, most SMBs in the UK regions interviewed expect their spending on IT to grow over the coming year, although there are those in a few areas who are expecting to cut back (Figure 14).

Figure 14
How will IT spending to change over the coming year?



The generally increasing spend might perhaps reflect higher levels of commitment associated with businesses that rely on connectivity, or a concern that prices will rise anyway outside of their control. In return for increased spending, organisations will expect more from their internet service in terms of performance, reliability and business value. These are the issues they should investigate with their ISP.

The challenge for many is to understand how business value maps onto the service capabilities offered by their provider. While a number struggle with the jargon involved, most of the respondents (many of whom have job titles suggesting several years experience in IT) feel it is not too much of a problem (Figure 15).

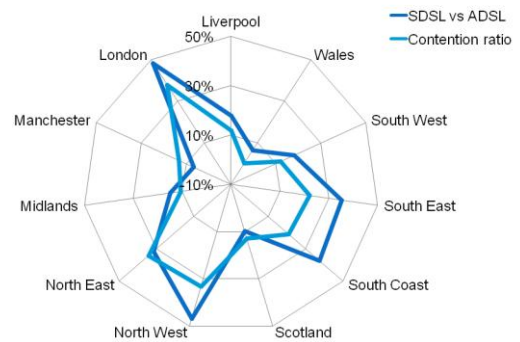
Figure 15
Is the level of jargon used in the IT industry a problem?



However, the reality, when they are faced with the technical terms often used by ISPs to discriminate between different service types, is more mixed. Two particular terms causing problems are Symmetric Digital Subscriber Line (SDSL) for a connection with the same bandwidth for upload as download and “contention ratio” for indicating how many subscribers share the same aggregated connection.

Surprisingly, many of those in regions that report less of a problem with the jargon are unaware of the true meanings of such terms and this leads to a lower percentage identifying the correct technical terms, although this may reflect how much the technology is being sold or marketed, in particular outside of London (Figure 16).

Figure 16
How well are certain technical terms correctly understood?



It is, however, no surprise that many do not really understand the correct meaning for the technical terms, but this does have an impact both for ISPs and their customers. Firstly, many of the novel applications and services that users are increasingly starting to use—VoIP and video conferencing, for example—are impacted by many other attributes than the often used criterion of available peak bandwidth. The figure quoted is often for download only—that is, for information transmitted from the internet to the subscriber. Bandwidth in the other direction will be more limited, unless a symmetric service is chosen from the ISP. Latency or network delay will also greatly affect the quality of interactive voice and visual services.

The role of the ISP

For an ISP, being able to articulate the value and effects of the additional parameters of connectivity options—such as SDSL or contention ratio—in terms of application benefits allows it to differentiate its services. This makes the task of the person responsible for selecting a network provider easier as they can justify investment more easily by referring to tangible business value.

Choosing and short-listing any category of supplier is always troublesome, especially in a technology sector where the impact of misunderstood technical parameters affects business requirements. When evaluating ISPs and their offerings, dependence on good service indicates that business reliability (Figure 17) and technical competence (Figure 18) matter, but price is still very important (Figure 19).

Figure 17
How important is business reliability when evaluating an ISP?

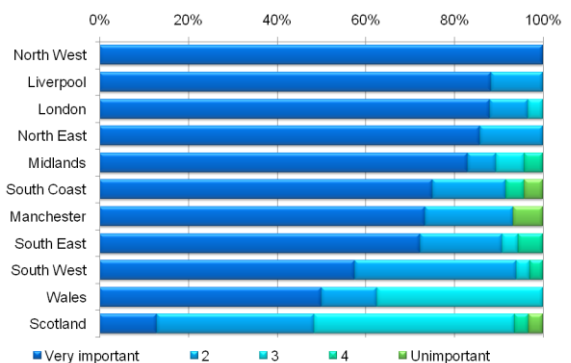


Figure 18
How important are technical abilities when evaluating an ISP?

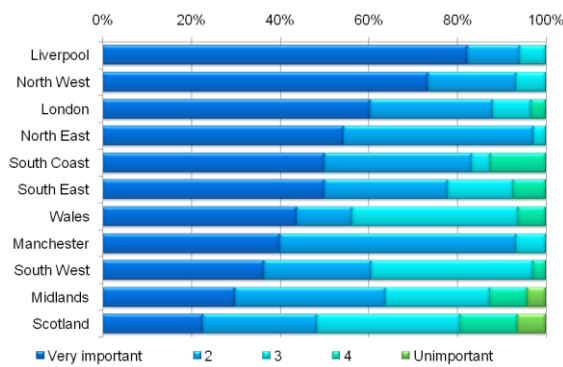
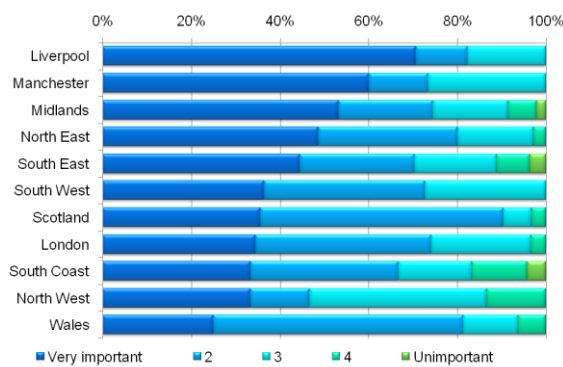


Figure 19
How important is price when evaluating an ISP?



Unlike many areas, brand and company image are less important when evaluating an ISP, perhaps as some well known brands have stumbled, poor service stories have hit the media and the market is very fragmented. Poor understanding of the differences between services mutes the importance of the range of connectivity offerings from ISPs, but better awareness of their value and application in support of various business services will make this a more important factor in the future.

Consumer internet impact

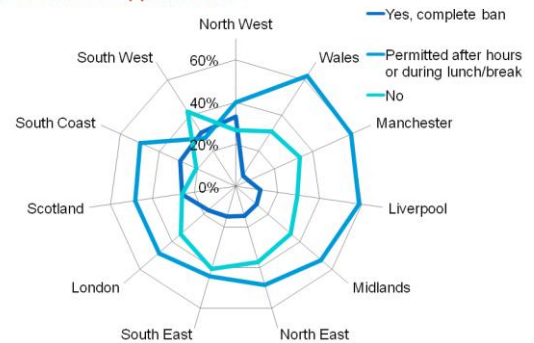
As the importance of the internet to the business grows, so too does the number of applications competing for resources. Some of these are critical business applications; some are commercially useful, but not vital; and others are just for casual use by employees, who have become very internet savvy as consumers.

This might only be the occasional checking of a sports score or paying a bill, or the more bandwidth-hungry downloading of music or video content. While not equal in terms of network resources, they all have an impact on time, and so many SMBs have a policy for limiting personal internet use in some way, although this varies from region to region (Figure 20).

Keeping use down during the working day is important when network capacity is required for business applications, although it will probably lead to surges at lunchtime and at the end of the working day. This needs to be taken into account when setting policy and working out the impact on internet-enabled services, particularly something where this would be very apparent, such as telephony. It also affects loads on other utilities that a business should also have in

place, such as security systems for detecting viruses, spyware, phishing emails and other spam.

Figure 20
Is there a policy for restricting employee use of personal or consumer internet applications?



Preventing consumer use altogether by employees is not going to be productive either. Bills need to be paid, other domestic issues resolved, and the odd snippet of news or information received, so some latitude here would be appreciated: for example, reducing the need for a lunchtime trip to the bank and saving employees time and inconvenience. The danger comes if this is taken too far and abused, with employees spending too much time or company resources on more personal or trivial internet activities.

Other advances are also having an impact. Consumer communication products are mostly easy to set up and use. Access to broadband networks, standardised audio-visual protocols, cheap or free applications like Skype, and the availability of integrated speakers, microphones and webcams in laptops and desktops, has made them simple to use.

So simple, in fact, that anyone with even a little spare budget and unfettered access to the IT network can trial internet applications on the business network. If it is sufficiently useful to provide some benefits from even occasional use, the level of investment does not require any authority. The unofficial use of collaborative tools, including application sharing, instant messaging, VoIP and perhaps video, can have an impact on the network capacity and bandwidth available for other applications.

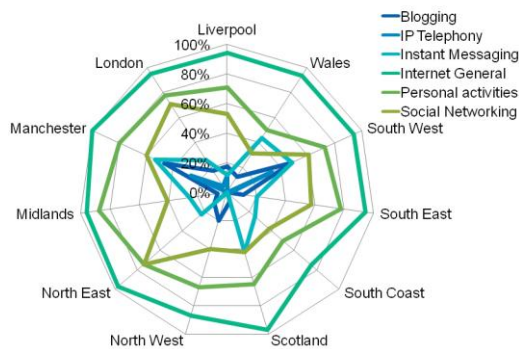
If these tools are proving useful from a business perspective, rather than simply entertainment or social networking for the employee, they need to be brought into the open and under the awareness of the IT or communications manager. This is partly for security and control reasons, but also for network and capacity planning.

The problem with many consumer internet applications is that the traffic they transmit is difficult to spot, especially if it is all wrapped in web protocols, so it just looks like any other web traffic. Some of these applications, such as those falling under the umbrella of Web2.0—blogging and social networking for example—might not be consuming significant bandwidth, but do have an impact on employee time and concentration. There is also a content security issue. For example, a corporate email address on a social network site can be used for targeted phishing attacks to gain corporate info, or disgruntled employees can post defamatory blog or wiki entries about their employer.

Using the internet at work for non-work-related tasks is something all SMBs are seeing in varying degrees, with web browsing overall and domestic activities—bill payment,

financial accounts management—the most widely noted activities, followed closely by social networking (Figure 21).

Figure 21
What sort of personal internet usage is there by employees?

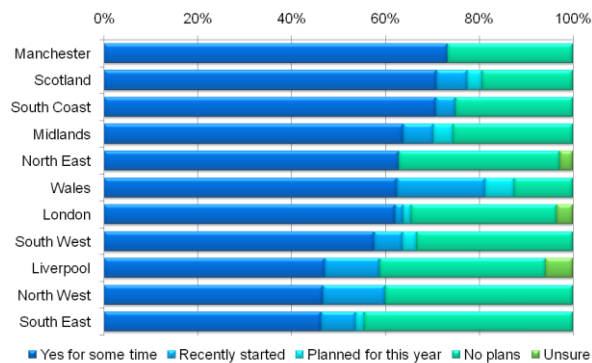


There is also the emerging use of instant messaging and blogging, and to a lesser extent, personal IP telephony (e.g. Skype). Those companies that have a policy of banning personal use of the internet at work will notice a reduction in activity, but this is unlikely to be as complete as they might like as there will still be some personal use, including domestic activities and social networking.

Retaining control

While some of the personal use of corporate time and resources may be perfectly reasonable and acceptable, SMBs should try not to let this get out of hand and might need to apply controls in support of any policy. Many SMBs are already using tools or services to control access (Figure 22).

Figure 22
Is internet access control or monitoring for site/content in use?



Is it essential that SMBs take the next step and monitor access to the internet and bar certain sites using access controls? Not really, but it will be very useful to apply controls to be able to better guarantee service levels. Taking small steps today is better than having to implement tougher action later.

Integrating home workers

SMBs need to be adaptable and are often quicker to adopt flexible working practices to better serve their customers than larger businesses. This can also make them more attractive employers than their enterprise counterparts.

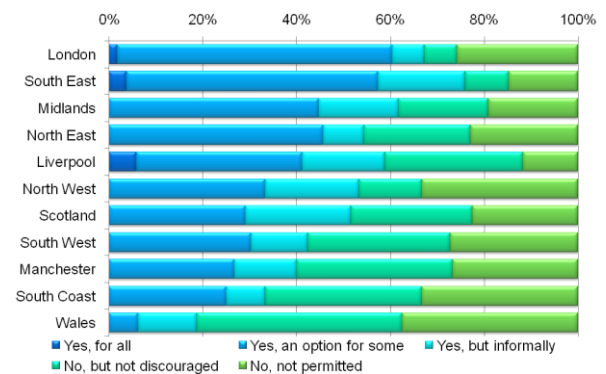
This includes flexible working and enabling employees when they are away from the business premises and, increasingly, those working at home.

There are other reasons for this shift. Work-life balance has been very topical in recent years, as well as legislative change from governments and demographic pressures:

- Ageing population: many are working longer and enjoying different phases during their working life and there is a blurring in what is traditionally retirement.
- Transient employment: increased migration and a growth in small owner/consultancy businesses is giving flexibility to both employer and employee.
- Women in the workforce: the Department for Work and Pensions expects 80% of workforce growth to come from women. European directives increasing the flexibility of both maternity and paternity leave also have an impact on working choices.
- Commercial premises: the pressure on premises can be relieved by encouraging working from home, allowing more cost effective locations to be found. Regional variations and government-led redevelopment incentives mean relocation can be worthwhile.
- Environmental pressures: congestion and carbon emissions are being addressed by reducing commuting and other journeys and efforts to cut down on power, heating and cooling.

Allowing employees to work from home has lots of benefits, but there are other implications to consider too, such as security, avoiding isolation, loss of corporate culture and management control. Many SMBs do encourage home working, at least for certain roles or informally, and notably in regions where travel times are longer and there is more congestion on the roads (Figure 23).

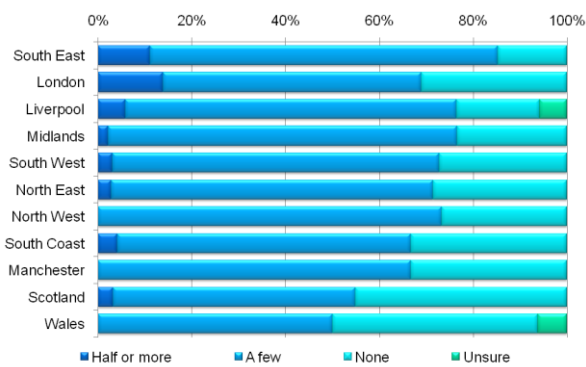
Figure 23
Does the organisation encourage employees to work from home?



For others it might not be suitable for the work involved or the type of individual employed. Despite having relatively few employees, SMBs still face the typical challenges of keeping everyone focused on the business as well as individual goals, and building an organisational culture.

Making sure that those who are working from home have the right tools and support is critical to their effectiveness. Despite relatively strong encouragement for home working, only a small proportion of employees are enabled for home working in most SMBs (Figure 24).

Figure 24
What proportion of employees are enabled for home working?



There are a number of reasons for this. It may be that only a limited percentage of employees fall within those roles encouraged, or even able, because of constraints in their role, to work from home, and that even where employees are encouraged, few take it up.

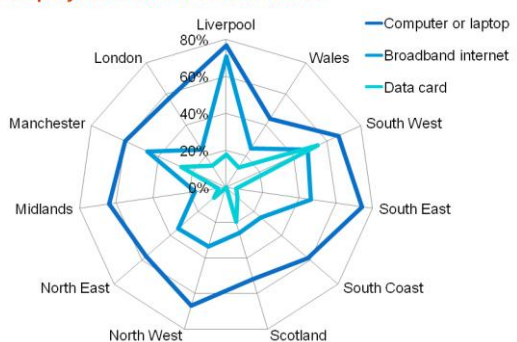
A significant stimulus will depend on the level of support that the SMB provides to integrate home workers into the business's IT and communications infrastructure. The first step is a phone connection, with mobile phones being most commonly provided (Figure 25).

Figure 25
What telecoms systems does the business provide (and pay for) to support employees who work from home?



Companies have, for some time, supplied laptops, and often to a greater extent than mobile phones to those working while mobile or remotely, but in many regions the internet connection is now becoming a key piece of the toolset provided to the home worker (Figure 26).

Figure 26
What IT systems does the business provide (and pay for) to support employees who work from home?



Mobile phones are often used to provide a communications link to those working at home, and the internet connection takes it a step further. However this is still relatively ad hoc,

and will make it difficult to convince those office-bound employees, who believe home working is 'home shirking', that an employee at home is really fully engaged on work activities. After all, the broadband connection will surely be put to other more domestic uses, as perhaps also will a laptop, but this too can be managed with suitable policy and controls.

Further commitment comes from the provision of a home landline office number, either as a second business line, or more efficiently as a VoIP extension on the end of the broadband connection. This not only makes good use of the capability, but also allows for the number to become an integral part of the office PBX. This offers the benefits of extension dialling and, perhaps more crucially, simpler call transfer, hunt groups and call pickup, bringing the home worker closer to the rest of the team.

It might mean that more care has to be taken in selecting ISPs, tariffs or packages, but that is a small price to pay for improving business effectiveness and organisational culture.

Conclusion

The use of the internet as a commercial rather than technical tool has grown in all corners of the UK. Businesses of all sizes have come to expect connectivity in all locations, and now demand reliability and the capacity to run more sophisticated applications and services.

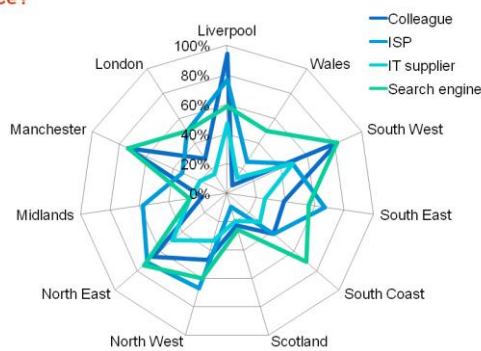
This increases the demands on IT resources and staff in any business. The information from technology suppliers has been historically poor and couched in too many technical terms to facilitate an easy correlation between service capability and business need.

ISPs have been no exception and, as bandwidth demands and connection options have grown, so too has the variety of services needing to be carried. For SMBs anywhere in the UK, any technical resources or knowledge at their disposal will be limited and they should not have to gain a deep understanding of supplier capabilities in order to select the right products. A technical understanding might help, but it should not be a necessary requirement of being a customer of an ISP.

Getting the right information is crucial, and the most used sources are colleagues, search engines (essentially the internet), IT suppliers and ISPs themselves (Figure 27).

Figure 27

Which of the following are trusted most to get information and guidance?



Those in an SMB with responsibility for IT and networks should therefore seek out providers that can describe their different technical offerings in business terms to identify tangible benefits. They should also ask the ISP about its ability to provide local support in the regions where the SMB has business premises and, perhaps, where its employee base lives. This not only makes the internal justification for investment easier and better matched to user and application needs, but also should make life for managers simpler in the long term through fewer support issues and crises.

As the use of the internet continues to expand and become more closely entwined with the business, SMBs need to use the expertise of commercially aware ISPs for guidance in optimising their internet connectivity and related services. Then they should be free to focus more of their precious resources and time on their core business needs.

Glossary of Terms

VoIP: Voice over IP—using the internet and data networks to carry telephone calls

ISP: Internet service provider—company providing connection to the internet

Contention ratio: the number of customers sharing a connection and available bandwidth

DSL: digital subscriber line—an internet link over a conventional telephone line

ADSL: A = asynchronous, with faster download than upload speeds

SDSL: S = symmetric, with same download and upload speeds

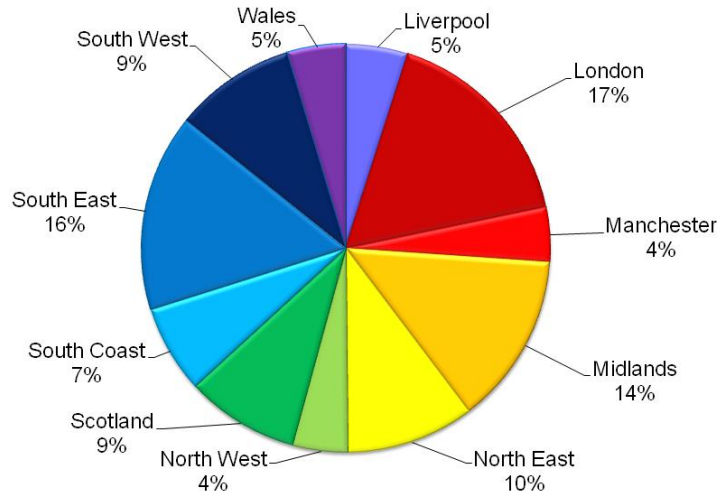
Appendix A: Interview sample distribution

The information presented in this report is derived from interviews with 345 UK-based managers with operational or commercial responsibility for IT and data communications in SMBs from all across the UK. Each organisation interviewed employs between 10 and 250 workers and the interviews were completed in April 2008.

The sample distribution is split as follows (Figures 28):

Figure 28

Country super region summary



About Easynet Connect

Easynet Connect is a leading provider of quality connectivity and internet access for small to medium size businesses.

Established in 1994 and part of BSkyB Group since 2006, Easynet Connect has the second largest network in the UK with 4450km of fibre and last mile access to more than 70% of UK businesses via a network of more than 1200 unbundled exchanges.

We were the first provider in the UK to offer DSL services over an unbundled local loop and have pioneered managed LLU services for businesses. Our services range from business class ADSL and SDSL through high quality leased line equivalent and Ethernet based services. Our SDSL coverage is currently the most extensive in the UK.

Easynet Connect's EtherStream™ service is pioneering Ethernet in the first mile allowing businesses to enjoy fast reliable Internet access. EtherStream™ is breaking through the limitations of traditional fibre connectivity.

Our services offer low or zero contention, the option of high speeds of up to 20Mb and are backed up by 24x7 UK based support and Service Level Guarantees.

Easynet Connect's customer base of small to medium sized businesses, ranging from 10 to 250 employees, spans a variety of sectors including media and advertising, construction and financial services.

For more information on some of our customers and their stories go to:

<http://www.easynetconnect.net/Industry-Insight.aspx>

For further general information on Easynet Connect please visit:

<http://www.easynetconnect.net/Default.aspx>



About Quocirca

Quocirca is a primary research and analysis company specialising in the business impact of information technology and communications (ITC). With worldwide, native language reach, Quocirca provides in-depth insight into the views of buyers and influencers in large, mid-sized and small organisations. Its analyst team is made up of real-world practitioners with firsthand experience of ITC delivery who continuously research and track the industry in the following key areas:

- Business process evolution and enablement
- Enterprise solutions and integration
- Business intelligence and reporting
- Communications, collaboration and mobility
- Infrastructure and IT systems management
- Systems security and end-point management
- Utility computing and delivery of IT as a service
- IT delivery channels and practices
- IT investment activity, behaviour and planning
- Public sector technology adoption and issues
- Integrated print management

Researching perceptions, Quocirca uncovers the real hurdles to technology adoption—the personal and political aspects of an organisation’s environment and the pressures of the need for demonstrable business value in any implementation. This capacity to uncover and report on end-user perceptions in the market enables Quocirca to advise on the realities of technology adoption, not the promises.

Quocirca research is always pragmatic, business orientated and conducted in the context of the bigger picture. ITC has the ability to transform business and business process, but often fails to do so. Quocirca’s mission is to help organisations improve their success rate in process enablement through better levels of understanding and the adoption of the correct technologies at the correct time.

Quocirca has a pro-active primary research programme, regularly surveying users, purchasers and resellers of ITC products and services on emerging, evolving and maturing technologies. 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 Oracle, Microsoft, IBM, Dell, T-Mobile, Vodafone, EMC, Symantec and Cisco, along with other large and medium sized vendors, service providers and more specialist firms.

Sponsorship of specific studies by such organisations allows much of Quocirca’s research to be placed into the public domain at no cost. Quocirca’s reach is great—through a network of media partners, Quocirca publishes its research to an audience possibly measured in millions.

Quocirca’s independent culture and the real-world experience of Quocirca’s analysts ensure that our research and analysis is always objective, accurate, actionable and challenging.

Quocirca reports are freely available to everyone and may be requested via www.quocirca.com.

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The logo for Quocirca, featuring the word "quocirca" in a lowercase, sans-serif font. The letters "qu" are in blue, "o" is in red, "c" is in blue, "i" is in red, "r" is in blue, "c" is in red, and "a" is in blue.