

MAR
2026

AI-ENABLED UGC: AN INFLECTION POINT
IMPLICATIONS FOR CREATORS &
GLOBAL MEDIA PLATFORMS

*** NOTE FROM QUIRE**

As strategic advisors and investment bankers we do not just observe the media and technology sectors; we operate within them. This position gives us a unique vantage point from which to see the tectonic shifts happening just below the surface of our industries.

The unraveling of Disney and OpenAI's partnership has moved AI-enabled fan participation from the experimental fringe to a board-level consideration. **This briefing explores how personalization and participation are collapsing the old economics of content strategies, and what it means to build adaptive IP systems in a world where no two users experience the same story.**

The question now is whether an IP owner defines their AI-enabled UGC posture or inherits it from the competition.

We Track The Five Primary Nodes That Govern This Participation Inflection:

*** The Anthropology Of Participation**

Recasting the transition from passive audience to active participant as a fundamental human continuity rooted in the architecture of play. We examine how four millennia of behavior, from Egyptian artifacts to modern action figures, inform the current demand for generative storytelling tools.

*** The Agility of Agnostic IP**

Analyzing how independent creators are outperforming legacy institutions by treating Intellectual Property as a dynamic platform for participation rather than a static asset to be guarded. We explore the structural advantage of "fearless governance" in the creator economy.

*** Psychology as infrastructure**

Defining the four distinct strategic postures, from conservative activation to platform-embedded participation, that determine how an organization interacts with the AI-enabled UGC layer. This framework enables a decisive underwriting of risk and capital.

*** Rights and Governance Architecture**

Identifying the critical requirements for establishing licensed rails and enforcement capabilities before external norms calcify. We move beyond the "launch of a platform" to the construction of a permanent governance stack.

*** The Decision Primer**

Providing a framework for executive leadership to translate AI-UGC from a theoretical threat into a series of explicit trade-offs in risk, capital, and control. This is the roadmap for a "Yes / No / Not Yet" posture for every priority franchise.

The insights here are grounded in real casework from Quire's clients and portfolio, spanning platforms, creators, and next-gen media operators. If you are building or backing the future of content, the lessons here are designed to scale with you.

Let's Build What's Next.

* THE ANTHROPOLOGY OF PARTICIPATION

The transition from passive audience to active participant is a fundamentally rooted human continuity stemming from the architecture of play, not merely a technological byproduct.

The history of play is effectively the history of decentralized storytelling. From the earliest recorded civilizations the human drive to interact with narrative has never been passive. Artifacts like the Egyptian Paddle Doll (c. 2080 BCE) represent the first "participation primitives" or sophisticated tools that allowed individuals to build personal language and story worlds around shared cultural symbols. **These objects were not simply toys; they were the hardware for narrative expansion.**

Interaction through play builds a psychological bond with IP that passive viewership cannot replicate. As the consumer moves from observer to co-author the IP begins to convert at the level of personal reality. The more a fan builds a world of language and story around an IP's elements the greater the likelihood of creating the long run loyalty that characterizes the world's most durable and valuable franchises. **Play is the catalyst that converts a discrete product into a lifelong identity.**

Generative AI provides a high velocity production layer for an ancient human requirement. **The most successful modern franchises will be those that recognize AI-enabled storytelling as the digital evolution of the action figure.** By providing fans with the tools to play at scale IP owners can engineer a level of ecosystem immersion that was previously unachievable. **We are not witnessing the birth of a new behavior but the industrialization of a primordial one.**

* THE EVOLUTION OF THE PARTICIPATION PRIMITIVE

The Drive To Extend Narrative Through Physical And Digital Objects Is A Historical Constant That Defines The Transition From Consumer To Stakeholder.

* THE PADDLE DOLL (c. 2080 BCE)

The earliest participation primitives were physical vessels for decentralized storytelling. These carved wooden artifacts from the Egyptian Middle Kingdom served as the first "action figures." They allowed the user to move beyond the static temple wall narratives and into a realm of personal, iterative storytelling.

- Narrative externalization through a dedicated object and fandom at its most early example
- AI is the modern "wood," a malleable material used to carve personal versions of shared myths.

* THE STAR WARS KENNER LINE (1977)

Commercialized play transformed cinema from a discrete event into a persistent lifestyle. The 3.75-inch action figure allowed a generation to "remix" the Lucasfilm canon in their backyards. This was the first global scale proof that the "secondary narrative" created by the fan is what cements long-term franchise value.

- The licensing of "authorized" tools for unauthorized fan stories exploded imagination.
- AI-enabled UGC is the democratization of the "Action Figure" model, removing the requirement for physical plastic to facilitate play but allowing for the perpetuation of the physical object with the right fandom ecosystem.

* POKÉMON & THE ECOSYSTEM OF PLAY (1996)

The shift from individual storytelling to a multi-node, participatory ecosystem. Pokémon succeeded by making the fan an active "trainer" within the world, not just a viewer of it. Through trading, battling, and custom naming, the consumer's specific choices became part of the IP's value.

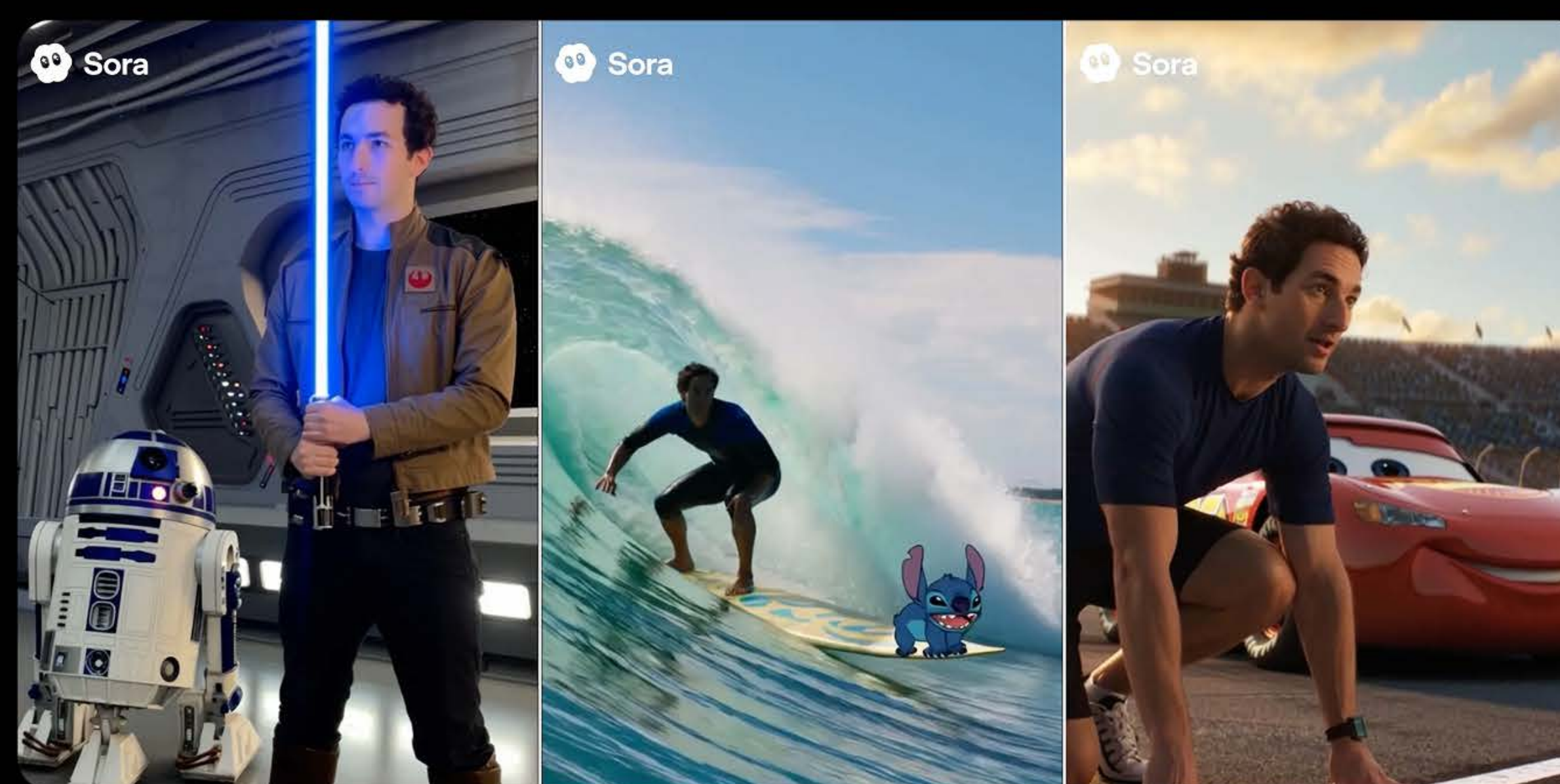
- Personalization as the primary driver of asset loyalty.
- AI-UGC Implication: Generative tools allow for "Pokémon-level" personalization across every category of media, not just games.

* DISNEY X OPENAI (2026)

The industrialization of the fan-led story engine. By integrating frontier LLMs and video generation with legacy IP, the "participation primitive" becomes a real-time, high-fidelity production layer. The fan is no longer just imagining a story; they are rendering it into reality with the same tools used by the studio.

- This is the final collapse of the barrier between "Creator" and "Consumer."
- **Implication: This is the terminal state of the Paddle Doll: an infinite, generative vessel for the human drive to play.**
- This partnership's unraveling does not indicate the demise of Disney's desire to bring characters to life, regardless of what platform or technology may be enabling its goals.

* HISTORICAL EXAMPLES CONNECTING PLAY



* THE AGILITY OF AGNOSTIC IP

Independent creators are outperforming legacy institutions by treating Intellectual Property as a dynamic platform for participation rather than a static asset to be guarded.

Independent creators have already internalized the reality that AI-enabled UGC is a scaled production layer.

By aggressively encouraging shares, reposts and remixes, entities like MrBeast have effectively turned their massive global audiences into a decentralized R&D department. They recognize that in a fragmented attention economy the greatest risk to an asset is not unauthorized use but cultural irrelevance. **They optimize for ubiquity over control.**

The absence of fear based governance allows independent creators to iterate on new tools in weeks rather than fiscal quarters.

This agility enables them to follow fan behavior wherever it migrates, from Roblox integrations to real time video co-creation unencumbered by legacy carriage agreements or theatrical windows. **Creators are building the participation infrastructure while legacy media is still debating the rules of engagement.** Speed is their hedge against platform volatility.

Removing traditional gates around IP creates a superior sandbox for fan led experimentation.

This fearlessness builds the foundation for integrated live and digital experiences that are inherently resistant to the decay of traditional content economics. **The creators who provide the most fertile ground for fan led world building will own the next era of high value consumer ecosystems. The future belongs to those who build the biggest sandbox not the highest wall**

* THE ARCHITECTURE OF THE SANDBOX

Independent Creators Are Securing Long-Term Asset Value By Transitioning From Content Broadcasters To Infrastructure Providers For Their Fanbases.

* THE MRBEAST ECOSYSTEM

Ubiquity is prioritized over the legacy obsession with platform exclusivity and copyright gating.

By encouraging global fans to dub and remix his content into localized fan channels entities like MrBeast have turned their audience into a multi-national distribution network. He treats his likeness and primary assets as open source tools that drive aggregate brand equity rather than guarded secrets. **This strategy optimizes for cultural ubiquity over the diminishing returns of absolute canon control.**

* ROBLOX NATIVE IP

Value is created through the provisioning of tools that allow fans to build within the world of the IP.

Properties like Dress To Impress, a community with 9mm members, are inhabited rather than watched. The creator provides the aesthetic and the rules of the world but the narrative episodes are generated by the users themselves. This creates a recurring engagement loop and a structural moat that legacy media cannot match with static video or limited-loop interactive assets. **The unit of value has shifted from the story to the sandbox.**

* THE CO-CREATION LAYER

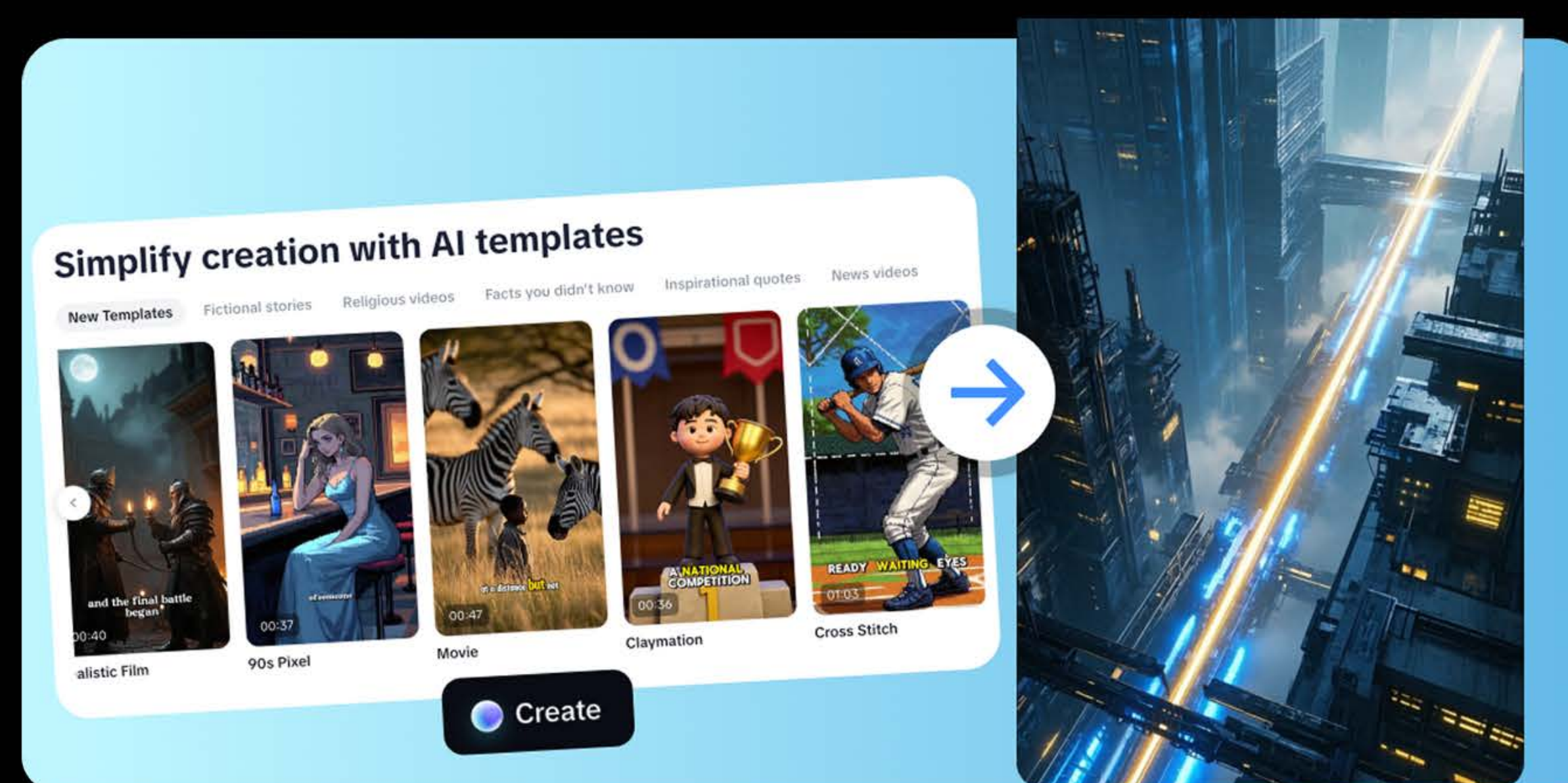
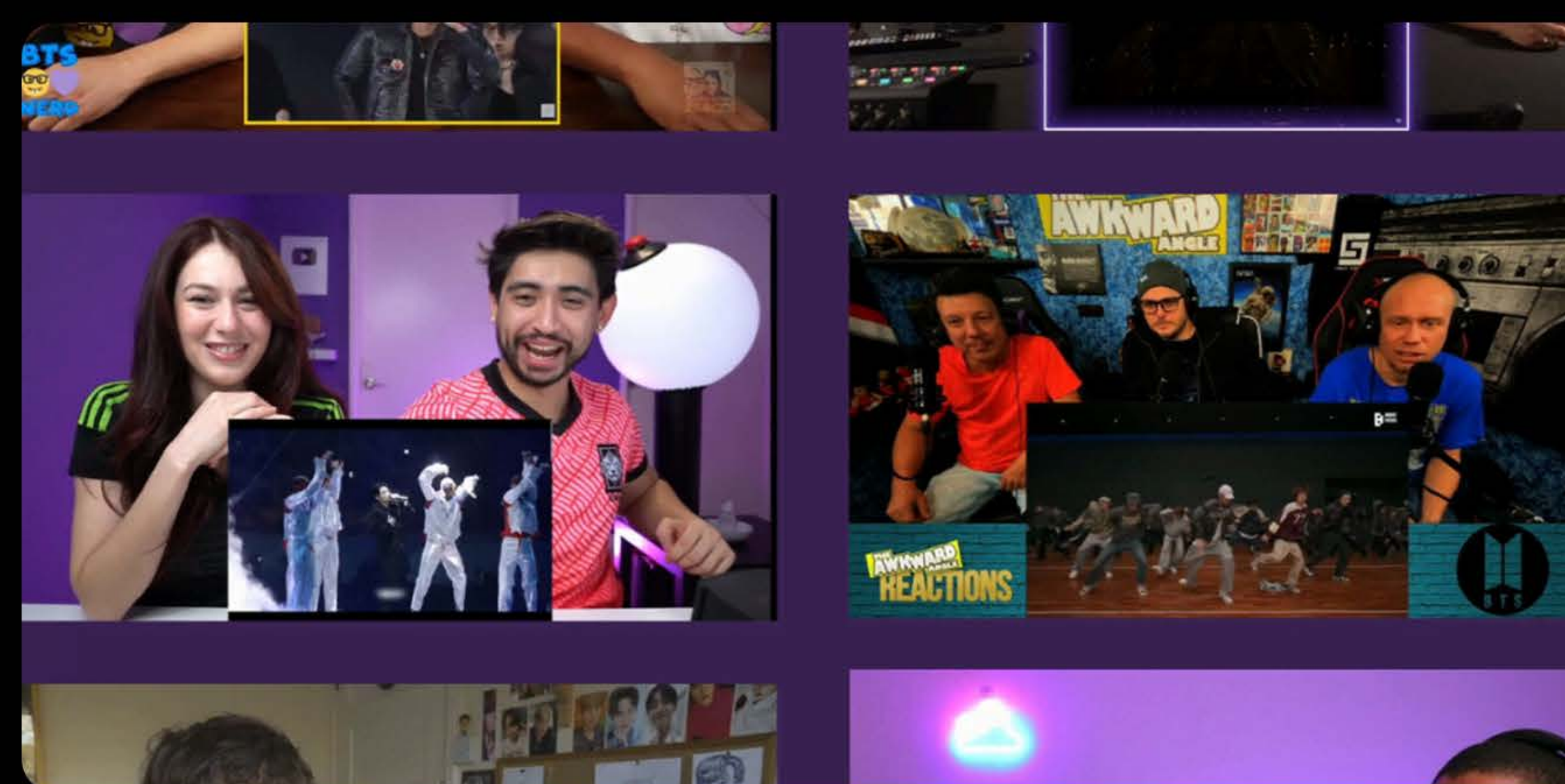
The industrialization of reaction culture creates a symbiotic economy between the primary creator and a fleet of secondary producers.

Kai Cenat and the Sidemen have mastered a model where they provide the master asset while a decentralized network of clip channels and fan editors earn a living by reframing the daily output. This Cenat Mafia effect creates a 24/7 cultural presence at zero production cost. **It turns a single live stream into thousands of distinct market entries and narrative nodes that are indexed to the growth of the primary IP.**

* THE GENERATIVE WORKFLOW

The extension of high fidelity generative tools to the fanbase marks the terminal state of the participation stack.

By utilizing platforms like CapCut for automated remixing and Krea for real time visual enhancement fans are now equipped with an industrial grade production layer. The creator provides the master assets and world logic while the fan uses generative software to render new iterations into reality. **This transition from protecting the canon to powering the participation is the new mandate for durable growth.**



* IMPLICATIONS FOR GLOBAL MEDIA PLATFORMS

Global Media have a narrow window to define a posture.

* UGC Is Not A Campaign Or Trend

It is a permanent and rapidly growing layer of how fans engage. Learning how to enable and facilitate it will build franchise value. Ignoring or underestimating fan-enabled UGC will dilute it.

* AI makes creation cheap and fast

Volume rises. Speed rises. Ambiguity rises. This makes governance harder, not easier for you.

* There are four basic paths available

You must decide which path(s) to take, and what minimum guardrails must exist.

* The answer is not one-size-fits-all

It varies by franchise. The real risk is ad hoc decisions, because norms harden over time.

Media platforms do not need to choose a path overnight. But **must now formalize how to evaluate** timing, ownership, guardrails, and escalation for AI-enabled UGC, before external platforms and fan norms lock in default rules.

* WHAT A STRATEGIC DECISION PRIMER MUST DO

Participation at scale demands formal governance.

Global Media platforms should begin developing an internal Strategic Decision Primer for AI-enabled UGC.

Its purpose is simple:

To enable leadership to choose a participation posture deliberately, **based on risk tolerance, capital allocation, franchise sensitivity, and governance capacity.**

It should be structured to align the organization around shared definitions, tradeoffs, and escalation pathways.

It will be driven by the nature and depth of media owner's IP combined with that platform's degree of technology capabilities.

Why this matters:

For each priority IP context, global media platforms should be able to answer:

Yes / No / Not Yet - and articulate why.

Those answers require four readiness checks:

1. Rights clarity
2. Governance maturity
3. Enforcement capability
4. Measurement clarity

* WHAT MUST BE CLEAR BEFORE A PATH IS CREDIBLE

For global media platforms, the question is not “do we like UGC?” It’s, “what are we willing to underwrite?”

AI-enabled UGC is now a participation layer sitting on top of every franchise; not a marketing tactic.

AI increases volume, speed, and ambiguity. That makes **the posture decision an underwriting decision**: how much risk, capital, and organizational load are you prepared to carry by design.

Before choosing any path, five inputs must be explicit.

1. Participation Perimeter

- What forms of participation are in-scope (clips, overlays, remix, modification, generative extension)?
- What is explicitly out-of-scope?

2. Rights Reality

- What is the ownership structure?
- Where are the talent sensitivities?
- What are the canon and likeness constraints?

3. Governance & Enforcement Capacity

- Who sets rules?
- Who clears edge cases?
- What enforcement muscle exists in speed, tooling, and escalation?

4. Risk Budget

- What headline risk is tolerable?
- What dilution risk is tolerable?
- What precedent risk is tolerable?

5. Measurement Bar

- What signals justify expansion?
- What signals trigger pause?

Only once these inputs are explicit can you choose among credible paths, each with defined tradeoffs in risk, capital, and control.

This is the construction of governance architecture for participation, not the launch of a platform.

* GLOBAL MEDIA'S FOUR PARTICIPATION POSTURES

Each reflects a different level of tech commitment, capital risk, and control.

<p>Activation Layer Path A Marketing-Layer Participation Leveraging 3rd Party Tools And Platforms.</p> <ul style="list-style-type: none"> • Campaign-contained activations • Third-party partners & tools • Low capital commitment • Centralized approvals 	<p>Feature-Based Participation Path B Structured Participation Primitives, With A Focus On IP Franchises.</p> <ul style="list-style-type: none"> • Starts with structured, IP-specific toolkits to pace market • Partnership-enabled capability • Conditional tech mobilization • Must be prepared to expand investment, tech build, and even M&A to keep up
<p>Build & Owned System Path C1 Proprietary Participation Infrastructure.</p> <ul style="list-style-type: none"> • Built platform layer • Rights-gated access • Dedicated technology team • Sustained capital investment 	<p>Third-Party Platforms Path C2 Deep Integration With External AI Platform.</p> <ul style="list-style-type: none"> • Enterprise-level platform partnership • External dependency trade-offs • Distinct data governance implications • Structural capital commitment

Paths A and B operate at the execution layer, with Path B potentially forcing paths C1 & C2.

Paths C1 and C2 are infrastructure commitments.

* TREAT AI UGC AS A MARKETING ACTIVATION LAYER

PATH A: ACTIVATION-ONLY (BRAND-SAFE)

What This Is

- Lean into advances in marketing that enable opportunities for fans to create content
- Pre-defined formats (clips, lenses, filters, caption packs) most often on social media 3rd party platforms (YouTube, Snap, etc.) using outside technologies and partners.
- Centralized approvals + clear rights boundaries
- Enforceable takedown mechanics
- Third-party tooling; no platform build

What This Optimizes For

- Governance confidence
- Brand and talent protection
- Low capital exposure
- Fast learning in contained environments

What It Deliberately Avoids

- Open remix ecosystems
- Persistent fan authorship layers
- Structural platform investment
- Category-shaping risk

Strategic Trade-Off

Captures defensibility and learning, but not compounding fandom ownership.

Timing Consideration

This is the one posture where global media platforms can realistically **fast follow** emerging fan-creation formats because execution relies primarily on third-party technology platforms, agencies, and existing marketing infrastructure.

* PATH A: MARKET EXAMPLE

Snap Sponsored AI Lenses

What This Is

- Official, paid AI/AR lens templates for brands
- Pre-defined creative outputs (filters, overlays, captions)
- Distribution contained to campaign windows
- Platform-controlled moderation + disclosure

Why This Fits Path A

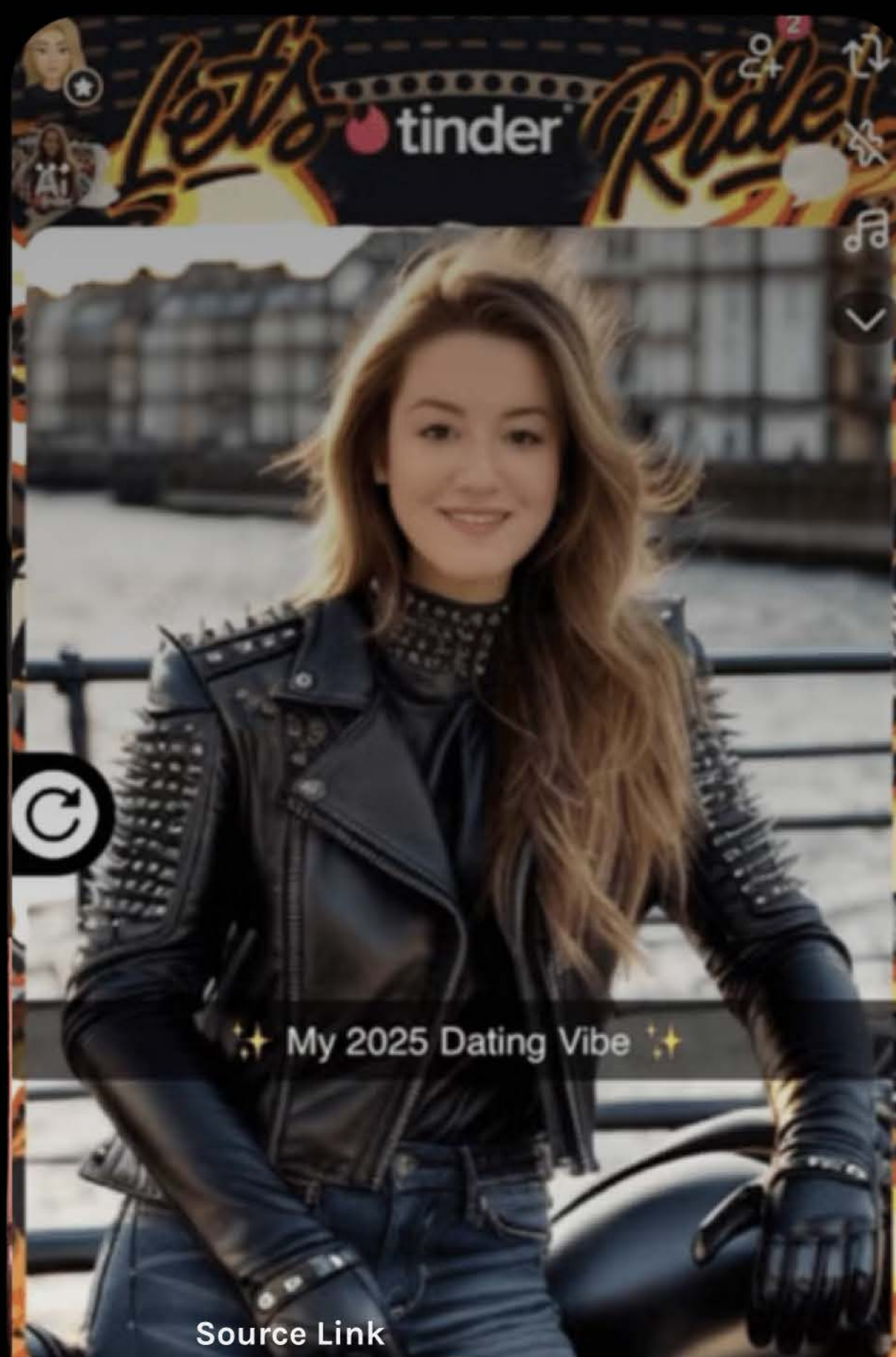
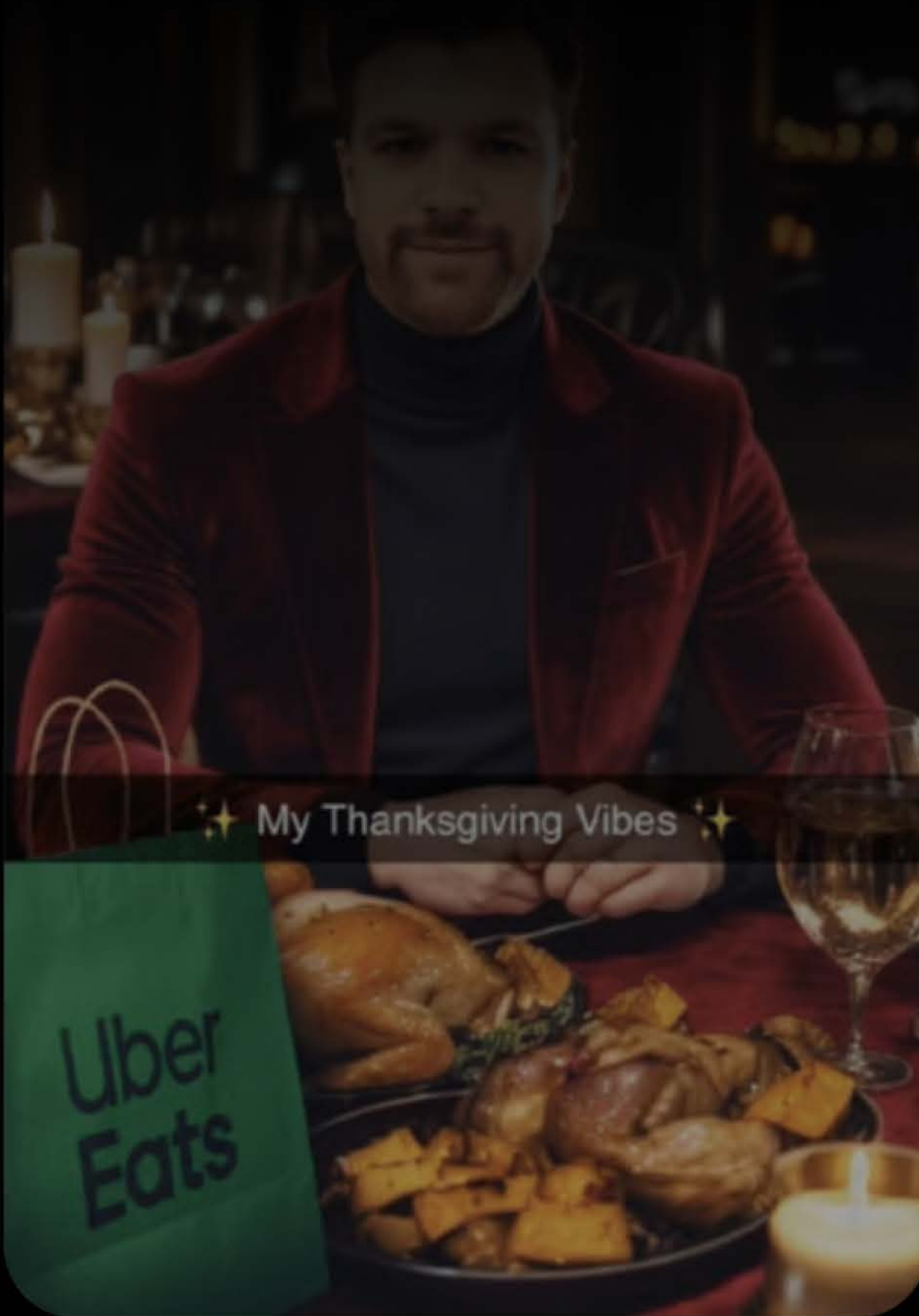
- Additive output; does not alter canon
- No open remix or persistent authorship layer
- Clear guardrails and takedown authority
- No platform build required by IP owner

Reported Impact

AI Lenses drive **25-45%** more impressions in a single day⁵

Translation

Official, campaign-based AI lenses for tentpole franchises, fully governed, time-bound.



* SHIP GUARDRAILED UGC “PRIMITIVES” AS PRODUCT FEATURES

PATH B: GOVERNED FEATURE PARTICIPATION

What This Is

- Initially, franchise-specific participation lanes
- Moving beyond marking and technology partnerships to building light tools and potentially M&A to acquire capabilities
- Strategic moves modeled on behavior of competitors, adjusted for your unique franchises and risk tolerance.
- Adoption of proven primitives (controlled remix, limited insertion, creator partnerships)
- Governance-owned decision gates per IP
- Initially measured capital allocation (partners, integrations, limited build)

What This Optimizes For

- Minimizes commitment and risk, while enabling you to watch and see what fans embrace and what becomes critical to franchise longevity and profit
- Accelerated learning beyond campaign activations by following what works for competitors
- Internal participation muscle and playbooks can be developed alongside mirroring what works for others
- Rights integrity + canon stewardship at scale
- Optionality to scale only when gates are met

What It Deliberately Avoids

- Frontier experimentation without norms
- Open-ended remix ecosystems
- Full platform build or tech-company posture
- Participation without cross-functional ownership

Strategic Trade-Off

Builds durable participation capability, but must fund governance, measurement, and cross-functional ownership.

Timing Consideration

Fast following is possible **only where you have prepared the participation infrastructure in advance** (partners, primitives, governance), allowing proven formats to be adopted quickly once fan behavior and competitive norms are visible.

* PATH B: MARKET EXAMPLE

Netflix “Moments” Clipping Feature

What This Is

- Scene-level clipping and sharing inside a competitor viewing experience
- Unlocked fandom via “share objects” (short, specific moments) that travel across social + messaging
- Deep links back to the title inside Netflix (clip → click → watch)
- A productized distribution primitive: repeatable, scalable, measurable

Why This Fits Path B

- More than a marketing activation: Netflix invested in a capability layer that increases IP marketing velocity
- Modeled on proven social mechanics (short clips, remix behaviors) but brought under platform control
- Lets Netflix learn what moments fans amplify, without building an open-ended remix ecosystem
- Governance can be designed into the system (format bounds, title eligibility, rights constraints, takedown pathways)

Reported Impact

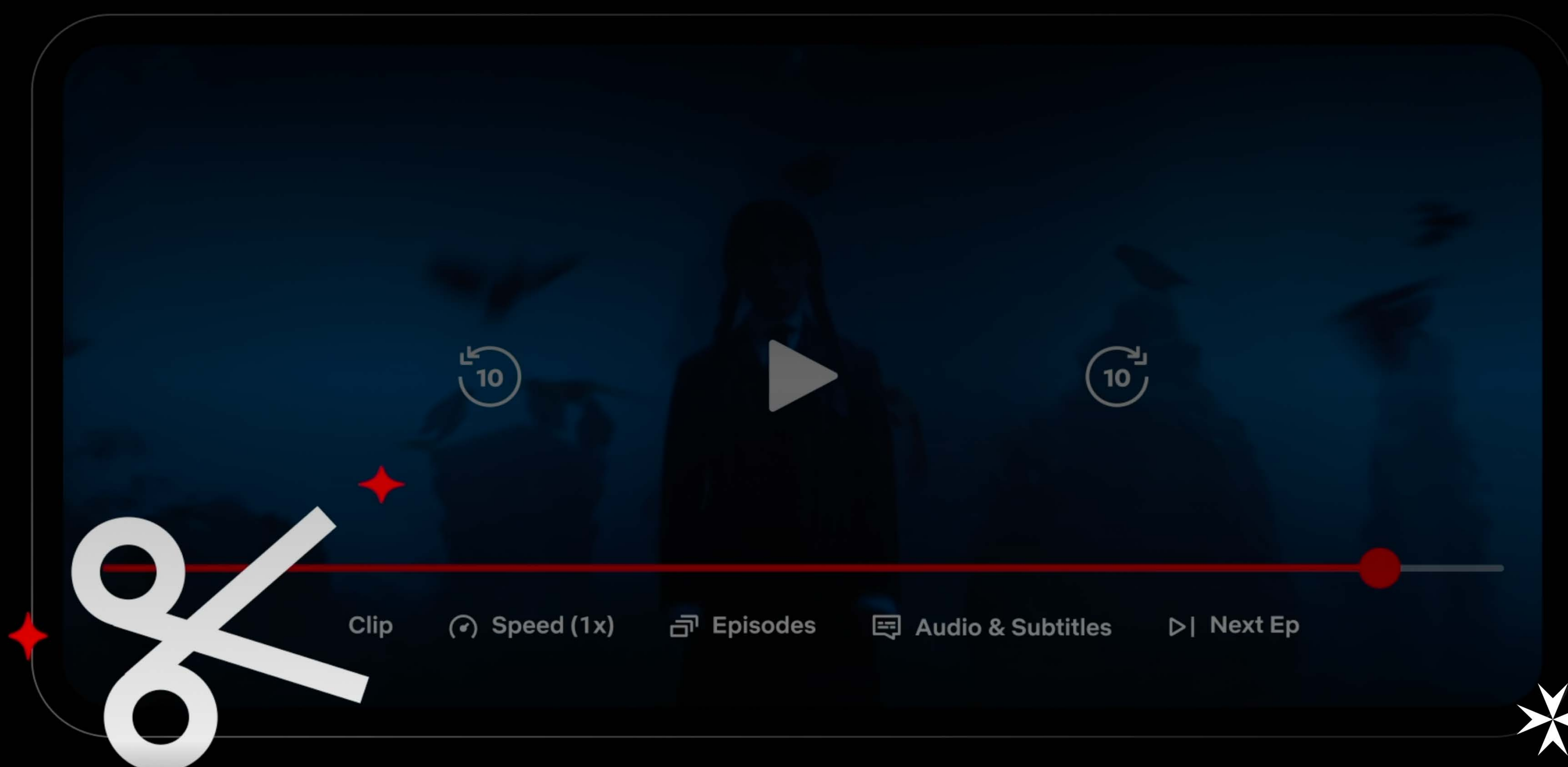
Netflix launched Moments in late 2024 and expanded/updated it in Sept 2025 with full start-end clip control - a signal it's being treated as a scalable engagement primitive, not a one-off experiment.¹

Translation

Platforms can treat clipping as a strategic fast-follower primitive: a controlled, rights-aware “share layer” for select franchises, built or bought, so fandom can drive discovery without default rights chaos.

Source Link

1. Tudum By Netflix (September 3, 2025)



* GLOBAL MEDIA COMPANY BUILDS AND OPERATES A
PORTFOLIO-LEVEL PARTICIPATION SYSTEM

PATH C1: OWNED PARTICIPATION STACK

What This Is

- Centralized identity, permissions, and attribution framework
- Defined IP and technology roadmapping
- Platform owns participation rails (templates, provenance, enforcement)
- Persistent participation layer across select franchises
- Operating model spanning legal, talent, brand, and franchise leadership
- Connectivity to platform's other technologies and fan experiences

What This Optimizes For

- Maximum control over canon and boundaries
- Durable fan habit between releases
- Full ownership of participation data and enforcement cadence
- Ability to evolve norms deliberately over time

What It Deliberately Avoids

- Platform dependence for participation governance
- Fragmented franchise-by-franchise experimentation
- Reactive policy posture
- Participation without durable operating model

Strategic Trade-Off

Gains the highest control and long-term defensibility, but assumes multi-quarter build, operating complexity, and upfront capital commitment.

Timing Consideration

Fast following becomes difficult at this layer: owned participation systems typically require **multi-quarter design, integration, and organizational alignment**, meaning platform must move **in anticipation of where the market is going rather than reacting after norms are established**.

Entirely unknown platforms or technologies often emerge that are a surprise and completely new, making anticipating their existence impossible. Social Networks are an example of this.

* PATH C1: MARKET EXAMPLE

YouTube Shorts Creation Tools

What This Is

- Creation primitives embedded directly into the core workflow (create → edit → publish → measure)
- Official templates, remix tools, audio layers, captions, and effects
- Identity-linked publishing tied to platform accounts

Why This Fits Path C1

- Tools, policy, distribution, and analytics live inside one owned environment
- Participation is repeatable, not campaign-based
- Governance is infrastructural, not reactive
- The platform captures data, attribution, and economic participation

Reported Impact

Deep tool integration increased creator adoption and output frequency across **70B+ daily** Shorts views globally.²

Translation

Owns a persistent participation layer across priority franchises, with identity, governance, and economic logic embedded by design.

Source Link

2. Alphabet Earnings Disclosures, 2024-2025



* ENABLE PORTFOLIO-LEVEL PARTICIPATION THROUGH
THIRD-PARTY PLATFORMS

PATH C2: PLATFORM-EMBEDDED PARTICIPATION

What This Is

- Official participation formats enabled through external AI UGC platforms
- Platform-native creation flows, discovery, and creator networks
- Platform defines guardrails; partners execute scale and iteration
- Recurring participation layer between franchise releases
- Investment in partners and leveraging their technology to build internal tools.

What This Optimizes For

- Immediate distribution and algorithmic amplification
- Access to existing creation habit loops
- Faster testing of participation formats
- Lower internal build burden

What It Deliberately Avoids

- Avoids "Whack-a-Mole" Litigation: Instead of fighting unauthorized AI "slop," IP-owner is converting potential infringement into a licensed, monetizable pathway.
- Avoids Technical Obsolescence: Bypasses the risk of building proprietary creative tools that cannot keep pace with frontier models and partners.
- Avoids High-Cost VFX Bottlenecks: Uses agentic tools like Project to automate "drudgery" in the animation and post-production pipeline (e.g., rigging and in-betweening).

Strategic Trade-Off

- From "Build vs. Buy" to "Invest & Integrate": Global media platform can trade the autonomy of an in-house engine for an equity-backed role "inside the machine" of one of the industry's leading AI platforms.
- Yielding Direct UX Control: Studio relinquishes the "walled garden" UX in favor of meeting fans where they already create.
- Dependence on Third-Party Infrastructure: Long-term strategy is now tethered to partners model roadmap and compute availability.

Timing Consideration

Fast following is rarely feasible at this layer: major platform partnerships require **long lead times, negotiated economics, and scarce partner alignment**, meaning the most advantaged positions are typically secured **before participation norms fully stabilize**.

* PATH C2: MARKET EXAMPLE

Disney × OpenAI

What This Is

- \$1B strategic equity investment by Disney into OpenAI
- Studio-licensed Disney IP participation within a third-party genAI system
- Defined scope of 200+ character and environment usage across OpenAI creation tools
- Platform-native creation, distribution, and discovery
- Contractual guardrails: labeling, provenance, audit and reporting
- Integration of OpenAI APIs to build proprietary production agents
- DisneyGPT, a secure internal LLM interface for employees

Why This Fits Path C2

- Deep generative creation enabled at scale
- Governance defined contractually
- Participation lives inside platform UX and algorithms
- Speed and reach prioritized over full-stack control

Reported Impact

Disney shifted from a customer to a strategic "insider." Beyond fan-facing Sora tools, the core impact is the deployment of DisneyGPT, a secure internal LLM for 225,000 employees, and the JARVIS protocol, an agentic AI designed to automate production "drudgery" like animation rigging and color grading. This move vertically integrates AI into the production pipeline, securing proprietary data while accelerating creative output speeds. **The demise of Sora calls into question Disney's goal of investing behind a platform that would enable storytelling for fans.**³

Translation

Lets platforms deliver the scale, but only under contract-grade control: provenance + disclosure, audit/reporting rights, and enforceable escalation.

Source Link

3. National CIO Review (December 11, 2025)



✧ UGC WILL ONLY BECOME A STRONGER ELEMENT OF FANDOM

The Opportunity To Set The Rules Is Closing

AI enabled participation is an underwriting decision rather than a marketing problem. Organizations must transition from reacting to fan behavior to actively architecting it or risk inheriting external platform norms that become structural liabilities. **Success requires a framework that translates participation into explicit trade offs in risk capital and control.**

Proprietary decision primers must replace ad hoc reactions to ensure a systematic posture for every priority franchise. This requires a rigorous audit of rights reality and governance maturity to prevent strategic diffusion. The objective is to secure the high option value of defining licensed rails before external standards calcify.

The desired state is achieved when an organization can defend a Yes / No / Not Yet posture for every asset in the portfolio with total clarity. This involves establishing explicit guardrails around provenance and audit reporting before reaching scale. This is the construction of a permanent governance architecture for participation rather than the launch of a platform.

✧ QUIRE IN PRACTICE

We help companies, funds, and platforms decode what's next, enabling them to act on it.

Here are a few examples from our case library:

RAPTIVE & ZMC (GROWTH STRATEGY & CAPITAL UNDERWRITING)

Working with the company and its PE-backer ZMC, Quire moved beyond traditional strategy consulting to architect a multi-billion dollar enterprise value expansion for this \$1B+ EV creator platform. By convening a 20-expert symposium, we identified and stress-tested both organic and inorganic growth opportunities across six synergistic sectors. Our work provided the strategic underwriting for an aggressive tech-stack and market diversification strategy designed to scale the business into a diversified ecosystem leader.

FANDOM (ECOSYSTEM MIGRATION & CAPITAL EXECUTION)

For this digital platform with 350M monthly users, Quire rebuilt the business model to shift the company from a traditional publisher to a data-driven fan ecosystem. We focused on leveraging proprietary data to "light up" fan engagement, creating a high-velocity growth plan that successfully translated massive reach into a sustainable monetization engine. This strategic pivot was the primary catalyst for securing a ~\$200M growth-capital investment from TPG.

GROUND NEWS (VISION ARCHITECTURE & INVESTMENT STRATEGY)

Quire supported a sophisticated Family Office in evaluating a \$50M investment by building a long-term vision for the company's business model. We developed a disciplined investment approach designed to provide an early-stage startup with the capital and strategic runway necessary to achieve market dominance. By validating the AI-UGC production layer and providing a rigorous framework for success, we gave the investor the confidence to underwrite a high-conviction, large-scale bet.

Let's Build the Future of Content Together
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