

GARTNER, INC. COPYRIGHT AND QUOTE POLICY

Gartner, Inc.'s name and published materials are subject to trademark and copyright protection, regardless of source. To use the "Gartner" name, take excerpts of Gartner research or quote Gartner analysts, a usage request must be submitted in writing to Gartner Vendor Relations for approval. Such approval is at the discretion of Gartner Vendor Relations. Gartner reserves the right of refusal.

Gartner, Inc. is the definitive source of objective technology thought leadership. To protect our reputation for objectivity, we require the appropriate use of our company name and research. The Gartner, Inc. name, intellectual property, trademarks, or logo may only be used commercially in connection with advertising, sales materials or other commercial efforts with Gartner's explicit approval for each instance of use. This policy defines the criteria that will be used to issue that approval.

Violations:

Should a requestor fail to comply with this policy, Gartner reserves the right to impose quote bans of varying durations, including a ban on all use of the Gartner name. For repeat or persistent violators, such ban will be for a minimum period of (3) months. In addition, Gartner may seek additional remedies available under contract, copyright and other applicable law.

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1. Quotation and Usage Policy Principles

- All Gartner intellectual property is subject to this Quotation and Usage Policy. Vendor Relations must approve any external use in writing.
- Limited use of excerpts internally within client organizations is allowed and does not require pre-approval. All copyrighted material should be marked "For internal use only". For guidelines on distribution of research pieces in their entirety refer to section 6.
- Gartner research may not be used to endorse a vendor or product or service, or to criticize a vendor's competitor. No company-specific excerpts are permitted as they may imply endorsement within the context of vendor materials.
- Custom quotes are quotes developed for a specific purpose by an analyst. Custom quotes must be approved by the appropriate research analyst, consultant, measurement analyst AND Vendor Relations in the context of the materials in which the quote will appear. Custom quotes are not permitted in releases announcing merger and acquisition, funding, earnings or new executive hire announcements.
- Quotes and excerpts must be from published research that is less than 12 months old.
- Quotes from published research must be properly attributed to the original research source. Please refer to section 4 for attribution format.

2. Guidelines for Usage and Quotes Based on Context

2.1 Advertising

In addition to section 1:

- Gartner reserves the right to approve the appropriateness of the creative copy of the overall ad in which the Gartner name and research will appear.

2.2 Brochures

In addition to section 1:

- Magic Quadrant graphics may not be excerpted for use in brochure copy due to their shelf life.

2.3 Legal or Financial Documents

- Clients may use excerpts from our published research in Securities and Exchange Commission (SEC) filing documents and financial statements, subject to our prior review and approval. We require that an indemnification agreement be signed as part of the approval process for these requests. Please return the signed indemnification agreement to fax number 1 866 681 4224 or scan and email to vendor.relations@gartner.com.
- Requested quotes or excerpts must be included in "Exhibit A" with full attribution to the research note, including title, author and date.
- No Magic Quadrant, MarketScope or Vendor Rating research is permitted in financial documents and annual reports due to limited shelf life.

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2.4 Materials Promoting Events Featuring a Gartner Analyst

In addition to section 1:

- It must be clear that Gartner is being featured and not co-hosting or sponsoring the event.
- The Gartner logo may only appear next to the analyst name, session information or analyst biography within the brochure, webcast, advertising or alternative media. The Gartner logo may not appear next to a vendor or other third-party logo, including that of the event sponsor. The Gartner logo may not exceed the size of the vendor logo.
- The Gartner name may not appear in the subject line of an email invitation.
- Hosting by third-party companies classified as Gartner competitors is not permitted.
- All materials must be approved in writing by Gartner Vendor Relations.

2.5 Newsletters

In addition to section 1:

- The Gartner name may not appear in the subject line of an electronic newsletter.
- The Magic Quadrant graphic may not be excerpted for use in newsletters.

2.6 Presentations

In addition to section 1:

- No company- or product-specific quotes or excerpts from Gartner may be included.
- For information regarding the use of Magic Quadrant, MarketScope and Vendor Rating graphics in presentations refer to sections 3.2, 3.3 and 3.4 respectively.

2.7 Press Releases

In addition to section 1:

- The word “Gartner” may not appear in the title or subtitle of press releases.
- The “About Gartner” boilerplate may appear only in Gartner corporate press releases.
- The use of the Gartner name or research in corporate boilerplates is not permitted.
- Press releases based on Magic Quadrant research may only announce the availability of the research, the particular quadrant in which the vendor is placed, and industry-generic excerpts from the research. Refer to section 3.2 for specific Magic Quadrant guidelines.
- Press releases based on a Vendor Rating may only announce that Gartner has published the Vendor Rating. Refer to section 3.4 for specific Vendor Rating guidelines.
- If there are any changes to the release after receipt of approval from Gartner Vendor Relations, the revised press release must be re-submitted in its entirety for final approval.

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2.8 Proposals

In addition to section 1:

- Please refer to section 3.2 for information on how the Magic Quadrant graphic may be excerpted for use.

2.9 Trade Show and Event Signage

In addition to section 1:

- The Magic Quadrant graphic may not be excerpted for use in signage.

3.0 Web sites

In addition to section 1:

- No company- or product-specific quotes or excerpts from Gartner may be displayed.
- The Gartner logo may only be used as a link to a purchased Gartner Web reprint or analyst speaking engagement promotion.
- For information regarding the use of Magic Quadrants on Web sites refer to section 3.2.

3. Guidelines for What Gartner Will Approve

3.1 Gartner Research

Consent for quoting published research is generally **granted** if the quote or excerpt:

- Does not contain statements about a specific company, product or service
- Is generic as applied to the industry
- Is taken from published research less than 12 months old (research in draft form is not available for excerpt or quotation)
- Is factual in nature (market size, market share)

Some examples of what Gartner will allow:

- “Creating a focus on e-business solutions is the right move for companies today. Customers require a delivery model that allows them to build the e-business solutions faster and at a lower cost.” Jon Doe, Gartner, Inc. Vice President and Research Director, Date.
- “According to Gartner, Inc., the ABC industry will grow at least 25 percent a year for the next five years.” Gartner, Inc., “ABC Industry Market Forecast 2005”, Jon Doe, Date.
- “By 2007, smart enterprise suites will emerge as an aggregation of the functionality offered today by portals, team collaboration support and content management.” Gartner, Inc., “The First Wave of Smart Enterprise Suites”, Jon Doe et al, Date.

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Some examples of what Gartner will not allow:

- “According to Gartner, Inc. analyst Jon Doe, Hi-Technology, Inc., the only company to offer a complete, cross-platform family of digital imaging products for the Web, including Feature 5.5, Feature Deluxe, Feature software and feature.com, has secured the No. 1 position in worldwide digital imaging based on market share revenues.”
- “Customers today require a delivery model that allows them to build the e-Business solutions faster and at a lower cost. Company X’s product Y can help customers achieve this goal.”
- “Company X ranked as leader in Gartner, Inc.’s Y industry magic quadrant while competitor Company A dropped from leader to niche player.”

3.2 Gartner Magic Quadrant Research

Use this Magic Quadrant template to create your press release.

- Magic Quadrant Research is a qualitative evaluation of a set of vendors in a specific market; it is NOT a stack ranking. Gartner will decline the use of any Magic Quadrant research to endorse the position of one vendor over another or to negatively endorse competitors’ positions.
- Magic Quadrant research content must originate from published research that is less than 12 months old and has not been revised in the interim.
- No retrospective wording permitted, for example, “fifth consecutive year” or “again”.
- No comparative wording permitted, for example, “only”, “highest” or “sole”.
- Magic Quadrant references must include an “as of” date.
- Custom quotes from analysts may not appear in press releases based solely on Magic Quadrant research.
- The Magic Quadrant graphic may not be excerpted and displayed as a stand-alone graphic in advertisements, annual reports, brochures, books or marketing materials due to the longer shelf life of these materials.
- The Magic Quadrant graphic may be excerpted as a stand-alone graphic for use in specific approved contexts, provided:
 - a) The graphic is displayed exactly as the original with no edits or changes.
 - b) The full research document title, author and date are footnoted.
 - c) The Magic Quadrant disclaimer is prominently displayed on the slide.
 - d) No other content or commentary is permitted.
 - e) Reprints are purchased in order to provide the audience with access to the full research document. Due to the nature of the content, the graphic must be evaluated in the context of the entire research note. This is a stipulation for approval.

Please include the following wording in any materials in which the graphic is excerpted:

GARTNER, INC. COPYRIGHT AND QUOTE POLICY

“This Magic Quadrant graphic was published by Gartner, Inc. as part of a larger research note and should be evaluated in the context of the entire report. The Gartner report is available upon request from (client name).”

To purchase reprints, please contact reprints@gartner.com.

- Any reuse or reference MUST have the following disclaimer (*) prominently published within the materials.

* Magic Quadrant Disclaimer

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The Magic Quadrant is copyrighted _____ (fill in date of publication) by Gartner, Inc. and is reused with permission. The Magic Quadrant is a graphical representation of a marketplace at and for a specific time period. It depicts Gartner’s analysis of how certain vendors measure against criteria for that marketplace, as defined by Gartner. Gartner does not endorse any vendor, product or service depicted in the Magic Quadrant, and does not advise technology users to select only those vendors placed in the “Leaders” quadrant. The Magic Quadrant is intended solely as a research tool, and is not meant to be a specific guide to action. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

.....

- When a Magic Quadrant is identified within a press release, the press release must also include the Gartner definition of the relevant quadrant. The definitions are as follows, or as stated in the specific piece of published research:

Magic Quadrant Definitions

Gartner, Inc.'s Magic Quadrant positions vendors in a particular market segment based on their vision and ability to execute that vision.

Leaders are performing well today, have a clear vision of market direction and are actively building competencies to sustain their leadership position in the market.

Visionaries have a clear vision of market direction and are focused on preparing for that, but they can still improve in terms of optimizing service delivery.

Challengers execute well today, but have a less-defined view of market direction and, therefore, may not be aggressive in their preparation for the future.

Niche Players focus on a particular segment of the client base, as defined by characteristics such as size, vertical or project complexity. Their ability to outperform or innovate may be impacted by this narrow focus.

For example, if a vendor is listed in the **Leaders** quadrant, it must include the Gartner definition of **Leaders** as follows:

“According to Gartner, Inc., leaders are vendors that are performing well today, have a clear vision of market direction and are actively building competencies to sustain their leadership position in the market.”

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Example of what Gartner will allow:

“XCORP is positioned in the Leaders Quadrant of Gartner, Inc.’s Application Integration Magic Quadrant.”

Example of what Gartner will not allow:

“XCORP has jumped into the leadership position in Application Integration according to Gartner, Inc.” or “XCORP is the recognized leader in the Application Integration market according to Gartner, Inc.”

3.3 Gartner MarketScopes

Use this MarketScope template to create your press release.

- MarketScope research, is a qualitative evaluation of a set of vendors in a specific market; it is a rating, NOT a ranking. Gartner does not allow the use of any MarketScope research to endorse the position of one vendor over another or to negatively endorse competitors’ positions.
- MarketScope research content must originate from published research that is less than 12 months old and has not been revised in the interim.
- No retrospective wording permitted, for example, “fifth consecutive year” or “again”.
- No comparative wording permitted, for example, “only”, “highest” or “sole”.
- MarketScope references must include an “as of” date.
- Custom quotes from analysts may not appear in press releases based solely on a MarketScope.
- The MarketScope table may not be excerpted and displayed as a stand-alone graphic in advertisements, annual reports, brochures, books or marketing materials due to the longer shelf life of these materials.
- The MarketScope table may be excerpted as a stand-alone graphic for use in specific approved contexts, provided:
 - a) The graphic is displayed exactly as the original with no edits or changes.
 - b) The full research document title, author and date are footnoted.
 - c) The MarketScope disclaimer is prominently displayed on the slide.
 - d) No other content or commentary is permitted.
 - e) Reprints are purchased in order to provide the audience with access to the full research document. Due to the nature of the content, the graphic must be evaluated in the context of the entire research note. This is a stipulation for approval.

Please include the following wording in any materials in which the graphic is excerpted:

GARTNER, INC. COPYRIGHT AND QUOTE POLICY

“This MarketScope graphic was published by Gartner, Inc. as part of a larger research note and should be evaluated in the context of the entire report. The Gartner report is available upon request from (client name).”

To purchase reprints, please contact reprints@gartner.com.

- Any reuse or reference MUST have the following disclaimer (*) prominently published within the materials.

* MarketScope Disclaimer

.....

The MarketScope is copyrighted _____ (fill in date of publication) by Gartner, Inc. and is reused with permission. The MarketScope is an evaluation of a marketplace at and for a specific time period. It depicts Gartner's analysis of how certain vendors measure against criteria for that marketplace, as defined by Gartner. Gartner does not endorse any vendor, product or service depicted in the MarketScope, and does not advise technology users to select only those vendors with the highest rating. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose

.....

- When a MarketScope is identified within a press release, the press release must also include the Gartner definition of the relevant rating. The definitions are as follows, or as stated in the specific piece of published research:

MarketScope Definitions

Strong Positive

Solid provider of strategic products, services or solutions.

Customers: Continue investments.

Potential customers: Consider this vendor a strong strategic choice.

Positive

Demonstrates strength in specific areas, but is largely opportunistic.

Customers: Continue incremental investments.

Potential customers: Put this vendor on a shortlist of tactical alternatives.

Promising

Shows potential in specific areas; however, initiative or vendor has not fully evolved or matured.

Customers: Watch for a change in status and consider scenarios for short- and long-term impact.

Potential customers: Plan for and be aware of issues and opportunities related to the evolution and maturity of this initiative or vendor.

Caution

Faces challenges in one or more areas.

Customers: Understand challenges in relevant areas; assess short- and long-term benefit/risk to determine if contingency plans are needed.

Potential customers: Note the vendor's challenges as part of due diligence.

Strong Negative

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Difficulty responding to problems in multiple areas.

Customers: Exit immediately.

Potential customers: Consider this vendor only if there are no alternatives

Example of what Gartner will allow:

“XCORP rated “Positive” in Gartner’s Partner Relationship Management MarketScope report.”

Example of what Gartner will not allow:

“XCORP ranked highest in Gartner’s Partner Relationship Management MarketScope report surpassing all competitors.”

3.4 Gartner Vendor Ratings

Use this Vendor Rating template to create your press release.

- Vendor Rating research, is a qualitative evaluation of a vendor as a whole, not just on its position within a single market. It is a rating, NOT a ranking. Gartner does not allow the use of any Vendor Rating research to endorse the position of one vendor over another or to negatively endorse competitors’ positions.
- Vendor Rating research content must originate from published research that is less than 12 months old and has not been revised in the interim.
- No retrospective wording permitted, for example, “fifth consecutive year” or “again”.
- No comparative wording permitted, for example, “only”, “highest” or “sole”.
- Vendor Rating references must include an “as of” date.
- Custom quotes from analysts may not appear in press releases based solely on a Vendor Rating.
- The Vendor Rating table may not be excerpted and displayed as a stand-alone graphic in advertisements, annual reports, brochures, books or marketing materials due to the longer shelf life of these materials.
- The Vendor Rating table may be excerpted as a stand-alone graphic for use in specific approved contexts, provided:
 - a) The graphic is displayed exactly as the original with no edits or changes.
 - b) The full research document title, author and date are footnoted.
 - c) The Vendor Rating disclaimer is prominently displayed on the slide.
 - d) No other content or commentary is permitted.
 - e) Reprints are purchased in order to provide the audience with access to the full research document. Due to the nature of the content, the graphic must be evaluated in the context of the entire research note. This is a stipulation for approval.

Please include the following wording in any materials in which the graphic is excerpted:

GARTNER, INC. COPYRIGHT AND QUOTE POLICY

“This Vendor Rating graphic was published by Gartner, Inc. as part of a larger research note and should be evaluated in the context of the entire report. The Gartner report is available upon request from (client name).”

To purchase reprints, please contact reprints@gartner.com.

- Any reuse or reference MUST have the following disclaimer (*) prominently published within the materials.

* Vendor Rating Disclaimer

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The Vendor Rating is copyrighted _____ (fill in date of publication) by Gartner, Inc. and is reused with permission. The Vendor Rating is an evaluation of a vendor as a whole, not just on its position within a single market. It is based on Gartner's assessment of the vendor's vision and execution for a product or service, relative to Gartner's analysis of clients' requirements. It is not intended as a comparison relative to competitors in the market. Gartner does not endorse any vendor, product or service depicted in the Vendor Rating, and does not advise technology users to select only those vendors with the highest ratings. Gartner disclaims all warranties, express or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

.....

- When a Vendor Rating is identified within a press release, the press release must also include the Gartner definition of the relevant rating. The definitions are as follows, or as stated in the specific piece of published research:

Vendor Rating Definitions

Strong Positive

Solid provider of strategic products, services or solutions.

Customers: Continue investments.

Potential customers: Consider this vendor a strong strategic choice.

Positive

Demonstrates strength in specific areas, but is largely opportunistic.

Customers: Continue incremental investments.

Potential customers: Put this vendor on a shortlist of tactical alternatives.

Promising

Shows potential in specific areas; however, initiative or vendor has not fully evolved or matured.

Customers: Watch for a change in status and consider scenarios for short- and long-term impact.

Potential customers: Plan for and be aware of issues and opportunities related to the evolution and maturity of this initiative or vendor.

Caution

Faces challenges in one or more areas.

Customers: Understand challenges in relevant areas; assess short- and long-term benefit/risk to determine if contingency plans are needed.

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Potential customers: Note the vendor's challenges as part of due diligence.

Strong Negative

Difficulty responding to problems in multiple areas.

Customers: Exit immediately.

Potential customers: Consider this vendor only if there are no alternatives

Example of what Gartner will allow:

"XCORP rated "Positive" in Gartner's Vendor Rating report."

Example of what Gartner will not allow:

"XCORP ranked positively in Gartner's Vendor Rating report exceeding all other competitors."

3.5 Gartner Cool Vendor Research

All press releases based on Gartner's Cool Vendor research must comply with the Cool Vendor Press Release Template.

Gartner's Cool Vendor listings do not constitute an exhaustive list of vendors in any given technology area, but rather are designed to highlight interesting, new and innovative vendors, products and services. Gartner disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

Gartner defines a "Cool Vendor" as a company that offers technologies or solutions that are:

- Innovative, enable users to do things they couldn't do before
- Impactful, have, or will have, business impact (not just technology for the sake of technology)
- Intriguing, have caught Gartner's interest or curiosity in approximately the past six months

No other use of the term Cool Vendor is permitted in vendor marketing materials when associated with Gartner, Inc. unless reprints are purchased. To purchase reprints, please contact reprints@gartner.com.

3.6 GartnerMeasurement

- GartnerMeasurement Decision Tool output may not be used for press releases or other marketing purposes. Decision Tool models are developed and sold to provide clients with a methodology and customizable software tool. Decision Tool models are shipped in a default mode and are intended to reflect the experience of previous users of the software, as well as Gartner analyst knowledge. However, the output of this default mode should not be represented as Gartner Research; rather it is a reliable and well-informed starting point for building client-specific scenarios.
- The guidelines for GartnerMeasurement case studies are the same as for Gartner Custom Client Engagements, as outlined in section 3.7.

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3.7 Gartner Custom Client Engagements

- No excerpts from Custom Client engagement reports are permitted.
- Custom Client engagement reports in their entirety may not be reused or distributed unless otherwise agreed to in the contract agreement and approved by Gartner Vendor Relations.

3.8 IT Watch

- Please refer to the IT Watch Quotation and Usage Policy.
- Send requests to quote IT Watch research to itwatchquote.requests@gartner.com.

3.9 Re-licensed Content

a) Print or Web Reprints

Gartner sells reprints of most of its published research. Purchased reprints may be provided in their entirety your internal associates, clients or potential clients. Use of reprints is subject to Gartner's reprint policy. Gartner must approve the marketing or promotional verbiage that advertises the availability of reprints. To purchase reprints, please contact reprints@gartner.com.

b) Multimedia Products

Multimedia products must clearly indicate that the contents include Gartner research. All promotional materials and packaging must reflect this emphasis. Gartner must approve the marketing or promotional verbiage related to these products. The Gartner logo may not appear next to a vendor logo (preferably the Gartner logo will appear at opposite ends of the CD or PowerPoint slide).

c) Gartner Connects Newsletters

The Gartner-provided newsletter design will also reflect the above principles for Multimedia Products.

4. Attribution

In February 2000, Gartner officially dropped the word "Group" from its corporate name, and became Gartner, Inc.

The only proper ways to reference Gartner when providing attribution to us is (a) Gartner, Inc., (b) Gartner Dataquest, (c) Gartner Consulting or (d) GartnerMeasurement. **Gartner Group is no longer our company name.**

When permission is granted, Gartner requires that proper attribution is included and, depending on the circumstances, that the material is reprinted with permission.

- Attribution to a Gartner analyst: According to John Doe, Principal Analyst, Gartner, Inc. or Gartner Dataquest and date if not ascertainable from the context.
- Attribution from published research: Gartner, Inc. or Gartner Dataquest plus the full title, author and date of the research.

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5. Basics of Copyright Law

Copyrights protect original works of authorship. The types of works covered by copyright vary widely, from literary works such as books, poems, technical manuals, or software code, to audiovisual works, musical works or works of fine art. Only the copyright owner of a work, or someone who has the copyright owner's permission, may (1) make copies of the work; (2) create adaptations ("derivative works") based on the work; (3) distribute copies of the work; (4) perform the work publicly; or (5) display the work publicly. These are referred to as the "exclusive rights" of a copyright owner.

Copyright protection attaches to a newly created work as soon as it is "fixed in a tangible medium of expression". For example, spoken words alone, such as a speech delivered extemporaneously that is not written down, would not be protected by copyright because it is not "fixed in a tangible medium." Works do not have to be registered with the U.S. Copyright Office, and do not have to display a copyright notice, in order to enjoy copyright protection.

The United States and most of the industrialized world are parties to the Berne Copyright Convention, which means that each member country will respect and enforce the copyrights that originate in other member states.

Virtually all of Gartner's published research is protected by copyright, whether in printed or electronic form.

6. Policy Regarding Copies of Published Research in its Entirety

Gartner does not permit the following uses of its research without prior written permission:

- Scanning, or otherwise importing publications into an electronic storage/retrieval system
- Broad distribution of publications to other units of the organization through electronic data transmission systems such as e-mail without the purchase of reprints
- Distribution of publications to external organizations via hard copy or electronically such as via e-mail without the purchase of reprints
- Distributing copies of publications to customers or prospective customers by company salespeople without the purchase of reprints
- Posting complete documents on an Internet or intranet site without the purchase of reprints
- Posting partial sections of documents on an Internet or intranet site without approval
- Placing Gartner content on a Web site other than one belonging to Gartner. Gartner content must always reside on our Web site, with the exception of PDF reprints

7. How to submit a quote or usage request for approval

Requests to quote, excerpt or reference the Gartner, Inc. name or research in any materials must be submitted to vendor.relations@gartner.com unless another e-mail address is noted herein.

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To approve your quote request we require:

1. The quote you wish to use
2. The original research source of the quote, attached
3. The materials in which the quote will appear, attached
4. Indicate the location of the quote in both documents

Estimated turn around time **if you have provided all of the required information** is 48 hours.

8. Who to contact

➤ Quote Requests, Approval and Questions

North America and EMEA

Primary Contact:
Sally Pinkerton, Vice President
Kimberly Wheeler, Manager

e-mail: vendor.relations@gartner.com
phone: 1 203 316 6178

Asia Pac

e-mail: apvendor.relations@gartner.com
phone: 612 9459 4629

Japan

e-mail: jpvendor.relations@gartner.com
phone: 81 3 3481 3611

➤ IT Watch Quote Requests

All Regions

e-mail: itwatchquote.requests@gartner.com

➤ Reprint Requests

All Regions

e-mail: reprints@gartner.com
phone: 1 203 316 6460

Changes to Policy

Gartner, Inc. reserves the right to change its policies or explanations of its policies at any time, without notice. These explanations and policies are for general informational purposes only and do not constitute a waiver with respect to any of Gartner, Inc.'s rights, all of which are specifically reserved. The policy in its most current form will be available on www.gartner.com under the Vendor Relations link.