Magic Quadrant/MarketScope FAQs
Research Process Steps for a Magic Quadrant (MQ) or MarketScope (MS)

1. What is the internal approval and corresponding external notification process for a new or updated MQ or MS?

New MQ or MS

The analyst proposes the MQ or MS as part of the agenda for a specific research area. The proposal includes the market definition, draft inclusion criteria, draft evaluation criteria, selected model (MQ or MS), project team and time involved. The proposal must first be accepted by the agenda manager, the analyst's direct manager and the chief of research. It is then submitted to the Senior Research Board for approval. The Senior Research Board's role is to ensure that we look across research agendas when we define a new market. On final approval, the new MQ or MS is added to the list of planned research on gartner.com. The refresh date is automatically set one year from the date it first publishes.

Annual Update of a previously published MQ or MS

The analyst proposes updating the MQ or MS as part of the agenda for a specific research area. The update may include minor changes from the previous year to refine the market definition, vendor inclusion criteria and evaluation criteria, if required. The proposal must be accepted by the agenda manager and the analyst's direct manager. No other approvals are needed. No change is needed to the list on gartner.com, unless the update falls beyond the one-year anniversary of the document.

Consolidating two or more previously published MQs or MSs

Consolidating two or more MQs or MSs is treated as a retirement of existing research and a new proposal. The MQs or MSs to be replaced are retired (archived) 12 months from the published date, as per standard practice. The consolidation proposal includes the new market definition, inclusion criteria, evaluation criteria, proposed project team and time involved. The proposal is submitted for approval, as for a new MQ or MS. Generally, the market definition will explain why the markets covered in previous research have changed to the extent that the market has been redefined. Redefinition is required when markets evolve to the extent that buying behavior changes.

Less frequently, a number of MQs or MSs representing subsegments of a large, complex market may be consolidated without the overall market changing. The change has been in the need for MQ or MS-type analysis at the subsegment level. The level of investment in each as a separate project exceeds client demand, and the decision is made to provide analysis at a higher level. The list of planned research on gartner.com will show "retired" for the previously published documents. The consolidated MQ or MS is treated the same as a new research and listed as "upcoming" research.

2. What is the process for retiring a previously published MQ or MS?

Retirement of an MQ or MS does not require a specific approval process. Rather, they are considered in the same manner as other types of research. It is the responsibility of the analyst with the relevant agenda manager to:

- Periodically evaluate whether the key issues associated with a topic area will be addressed by planned research.
- Evaluate client demand for new or updated research about specific topics.

If a particular MQ or MS is a low priority in terms of overall topic coverage and/or client demand for that research has declined, then the decision may be not to update the MQ or MS. At that time, the analyst should notify our central agenda management team of that decision to update the planned list of MQs and MSs on gartner.com. In addition, the analyst is contacted by that same team in the quarter prior to the MQ or MS's 12-month anniversary date to verify whether the document will be updated. If the decision has been made not to update the research, then the list on gartner.com will be revised to show "retired," and the document will be archived a year after its publication date.

3. When are vendors contacted directly about a new, updated or retired MQ or MS?
New MQ or MS
The first notice a vendor may receive about a new MQ or MS is receipt of a letter requesting a contact to work with throughout the research process. If the analyst knows in advance the contact he or she needs to work with throughout the project, then a vendor will receive a letter that explains the market definition, inclusion criteria, evaluation criteria and weights, research process and timeline. For a new MQ or MS, this notification ranges between eight and 16 weeks (depending on project complexity) before the planned publication date. For situations in which the analyst does not require extensive information from vendors, and for annual updates, the notification period may be significantly shorter, depending on the complexity of the project.

Retired MQ or MS
Vendors are not contacted directly when an MQ or MS will be retired. The information is available on the MQ/MS list on gartner.com.

4. Are vendors contacted if they are dropped from an MQ or MS when it is updated?
Yes, vendors are notified in advance of publication that they will not be represented in the updated research. The published document will note that the vendor has been dropped and include a brief explanation of why that vendor no longer meets the inclusion criteria.

5. Can a vendor opt in or opt out of an MQ or MS?
Which vendors are included in the research is solely a factor of the market definition and inclusion criteria established by the analyst. If a vendor meets the inclusion criteria, then our process requires that it is represented in the MQ or MS. Consequently, a vendor cannot opt in or out of an MQ or MS.

6. Are analysts required to ask vendors for information specifically for an MQ or MS project?
Analysts are not required to ask vendors for information specifically for an MQ or MS. It is up to the analyst to determine whether he or she has sufficient information through regular contact with vendors and customers in that market to develop an MQ or MS. If the analyst requests information, then it may come in the form of a request for a briefing or a short questionnaire. In some cases, analysts use the MQ or MS project as that point in the year when they update their baseline research on a market. This may spur a request for information, which is broader in scope than needed for the MQ or MS itself, because it has a wider purpose.

7. If the analyst does not require additional information, then when are vendors notified that they will be represented in an MQ or MS report?
Vendors will be notified according to our standard practice for factual review, which in the case of a MQ or MS is five business days from the time the request is sent. However, a best practice is for analysts to notify vendors early in the project that research is under way and when to expect the draft MQ or MS for factual review.

8. What happens if a vendor declines to provide information requested by the analyst?

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Analysts work with the information available to them from all other sources, including publicly available information, feedback from our client base, and industry contacts. The draft MQ graphic and specific content related to that vendor are sent for factual review, as per the standard process.

9. What assurances do vendors have that any references provided will be contacted by the analyst?
If a reference is provided that the analyst knows in advance is not suitable, the analyst is required to inform the vendor that the reference will not be contacted. For all other references, the analyst is required to use best efforts to contact them. If the analyst has made several attempts to contact a reference without success, he or she is not required to notify the vendor.

10. What opportunity do vendors have to review the MQ or MS before it is published?
Vendors are given a minimum of five business days to review the draft content relevant to them. The analyst will send the complete MQ graphic (for example, with all named "dots") and only the text specific to the vendor.

11. Is the data collection and review process the same for all vendors, even if they are not Gartner clients?
Yes, it is exactly the same. In terms of our research processes and representation in our published research, analysts make no distinction between clients and non-clients.

12. What if we disagree with our positioning or the analyst's comments?
The first point of escalation is the analyst who created the research being questioned. Vendors should approach analysts with issues regarding facts, processes, methodologies or opinions expressed in research.

The second point of escalation is the analyst's team manager, whose role is to verify that all required methodologies and processes were followed by the analyst(s) and that all research positions have been appropriately supported.

The third point of escalation is the Gartner Office of the Ombudsman. After opening a formal case, the Ombudsman will evaluate both sides of the issue, review research and related history as needed, and facilitate continuing discussions. The Ombudsman mediates the issue and ultimately recommends final disposition, if needed, making every effort to encourage prompt issue resolution. Contact the Office of the Ombudsman at ombudsman@gartner.com or +1 203 316 3334.

13. What is the best way to avoid surprises?
The best way to avoid surprises is to establish regular contact with the analysts who track the markets relevant to a vendor. Check the MQ and MS listing on gartner.com regularly for changes and new additions.

14. Where is information available about reprint and quote policy?
Information is available on this site or by contacting Vendor Relations directly.
http://www.gartner.com/it/about/vendor_relations.jsp, vendor.relations@gartner.com or +1 203 316 6178