

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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GARTNER, INC. COPYRIGHT AND QUOTE POLICY

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.
- This policy applies to all contexts in which the Gartner name or research may appear externally. It includes, but is not limited to advertising, annual reports, blogs, books, brochures, marketing materials, media alerts, newsletters, press releases, presentations, signage and speeches.
- 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 4.
- Gartner research may not be used to endorse a vendor, product, 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, new executive hire, survey results, advertisements or when a release is based solely on Gartner research.
- 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 7.1 for attribution format.
- The Gartner name may not appear in the title/sub-title of a press release, newsletter or subject line of an email distribution.

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 Legal or Financial Documents

- Clients may use excerpts from our published research in Securities and Exchange Commission (SEC) filing documents and financial statements. 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.

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2.3 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 promotional material. 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.
- Hosting by third-party companies classified as Gartner competitors is not permitted.

2.4 Press Releases

In addition to section 1:

- The “About Gartner” boilerplate may appear only in Gartner corporate press releases.
- The use of the Gartner name or research in corporate boilerplates or signatures is not permitted.
- For specific information for press releases based on Magic Quadrant, MarketScope, Vendor Ratings, please refer to section 3.
- 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.
- Custom quotes may not appear any earlier than the third paragraph of a press release.
- One custom quote permitted per release.

3. Guidelines for Usage and Quotes Based on Research Source

3.1 Gartner Cool Vendor

- All press releases based on Gartner’s Cool Vendor research must comply with the [Cool Vendor Press Release Template](#).
- 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.

3.2 Gartner Custom Client Engagement

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

3.3 Gartner Dataquest

In addition to section 1:

- Numbers from the most recently published report concerning the industry must be used. For example, if a Market Share report about server shipments is published after a

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Forecast report about server shipments, the information from the Market Share report must be used.

- Retrospective wording is permitted. For example, “Company X has led in server shipments worldwide for three consecutive years.”
- The material may include claims based on ranking. For example, “Company X is #1 in server shipments worldwide.”
- All ranking claims must be based on market share, revenue or shipments, timeframe, and region. For example, “Gartner, Inc. has ranked Company X as the worldwide market share leader in web access management marketplace based on total software revenue for 2005.”
- No direct references to other vendors by name are permitted in press releases based on Gartner Dataquest numbers. A reference to a “closest competitor” is permitted.
- Excerpts of a reasonable amount of data may be placed in chart or table format.
 - The charts or tables must include all the data in the Gartner Dataquest report’s table, or the top 10 vendors, and others.
 - If referencing the Gartner Dataquest research in a chart or table, the research report must be noted in the attribution as “Source: Gartner, (NAME OF REPORT), (DATE)”
 - Vendor-created numbers must be clearly noted as separate from the Gartner Dataquest numbers. If the vendor calculates any of its own numbers to include in a chart or table that also includes numbers from the Gartner Dataquest reports, the following must be included in the attribution: “Calculations performed by Company X.”
 - No one to one vendor comparisons permitted. Thus, more than 2 vendors must appear in the chart or table.
 - No more than 3 tables or charts may appear.
- If claims are based on a preliminary report, it must be clearly stated as such.
- No company-specific text excerpts lifted verbatim from the report permitted.
- Custom quotes from analysts may not appear in press releases based solely on Gartner Dataquest research.
- When submitting a request, please note the report’s relevant table numbers from which the numbers are taken in order for us to verify the data claims.
- Advertising copy based solely on Gartner Dataquest numbers is not permitted, as it would constitute more than 30% of the advertisements content.
- The Gartner data must appear separate to that of any other analyst firm data.

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3.4 Gartner Magic Quadrant

In addition to section 1:

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.
- No retrospective wording permitted, for example, "fifth consecutive year" or "again".
- No comparative wording permitted, for example, "only", "highest" or "sole".
- 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, financial documents, press releases or, event signage.
- The Magic Quadrant graphic may be excerpted as a stand-alone graphic for use in specific approved contexts, for example proposals and presentations 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:

"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.

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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."

3.5 Gartner MarketScope

In addition to section 1:

Use this [MarketScope template](#) to create your press release.

- The same principles for Magic Quadrant research apply. Please refer to section 3.1.
- Use of "highest" is only permitted when stating "strong positive" is the highest possible rating given. No other use is permitted.
- Please include the following wording in any materials in which the graphic is excerpted:

"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

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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

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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

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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.”

3.6 Gartner Vendor Rating

In addition to section 1:

Use this [Vendor Rating template](#) to create your press release.

- The same principles for Magic Quadrant research apply. Please refer to section 3.1.
- Use of “highest” is only permitted when stating “strong positive” is the highest possible rating given. No other use is permitted.
- Please include the following wording in any materials in which the graphic is excerpted:

“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.

.....

Example of what Gartner will allow:

“XCORP rated “Positive” in Gartner’s Vendor Rating report.”

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Example of what Gartner will not allow:

“XCORP ranked positively in Gartner’s Vendor Rating report exceeding all other competitors.”

4. 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

5. 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.

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.

6. Who to contact

- Quote Requests, Approval and Questions

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North America and EMEA

Primary Contacts:
Aaron Yaverski, Group Vice President
Allison Fletcher, Manager

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

AsiaPac

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

Japan

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

➤ 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.

7. NOTES

7.1 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 or (c) Gartner Consulting. **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.

7.2 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.

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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.

7.3 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 for 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.