Magic Quadrant and MarketScope: **Frequently Asked Questions**

Gartner follows a formal process to create Magic Quadrants and MarketScopes to ensure consistency in our ratings and placements. The questions that follow address what we hear most often from end users and vendors about these processes.

Research Processes for Magic Quadrants and MarketScopes

What is the internal approval process for a new Magic Quadrant or MarketScope?

If an analyst wants to create a new Magic Quadrant or MarketScope, he or she proposes the research as part of a specific research agenda.

The proposal includes:

- The market definition
- Draft inclusion criteria
- Draft evaluation criteria
- Proposed model (Magic Quadrant or MarketScope)
- Project team and time involved

The proposal goes through several internal levels of review, ending with the Senior Research Board, to ensure that we look across research agendas when we define a new market. Once approved, the new Magic Quadrant or MarketScope is added to the list of planned research on gartner.com. Magic Quadrants and MarketScopes are reviewed annually, and the title of the Magic Quadrant or MarketScope, along with the refresh date, is noted on the planned research list on gartner.com.

What is the process for an annual update to a previously published Magic Quadrant or MarketScope?

To ensure a current reflection of market conditions, an analyst proposes updating the Magic Quadrant or MarketScope as part of the agenda planning for the upcoming year for a specific research area. The update will include 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 team 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.

How do you consolidate two or more previously published Magic Quadrants or MarketScopes?

Analysts who want to consolidate two or more Magic Quadrants or MarketScopes are asked to retire the existing research documents and create a proposal for a new one. The proposal process is roughly the same as that explained above. The new market definition explains why the markets have been consolidated. The Magic Quadrants or MarketScopes to be replaced are retired (archived) 12 months from the published date. The list of planned research on gartner.com will show "retired" for the previously published documents. The consolidated MQ or MS is considered new research and listed as "upcoming" research on gartner.com.

What is the process for retiring a previously published Magic Quadrant and MarketScope? Why would that happen?

Retirement of Magic Quadrants and MarketScopes follow a specific process. The analyst and relevant agenda manager evaluate whether a Magic Quadrant or MarketScope should be retired, based on decreased client interest in the overall market area or if certain changes to the market have occurred. If a particular Magic Quadrant or MarketScope is a low priority in terms of overall topic coverage or client demand for that research has declined, the decision may be to not update the Magic Quadrant or MarketScope. If the decision is made to retire the research, the "Refresh Date" field on gartner.com will say "retired," and the document will be archived a year after its publication date. The lead author will notify all vendors that participated in the now-retired Magic Quadrant or MarketScope that it will no longer be published.

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Why doesn't Gartner share specific rating results of vendors?

Magic Quadrant or MarketScope authors collaborate to evaluate and score each vendor using a set of weighted criteria that are described within each methodology. The resulting scores are used to generate a Magic Quadrant position or MarketScope rating. Gartner does not provide specific scores because scores are based on not just quantitative elements, but qualitative as well. So it is not strictly a mathematical calculation. A vendor might earn a relatively high score in Product/Service because the quality, uniqueness and integration of its product/service elements is higher than other vendors', even if it lacks some of the features of other vendors. One area to look for where vendors scored particularly high is in its Strengths section; where it scored low is often reflected in the Cautions bullets. Again, this is not always the case, but it often is.

When and how are vendors contacted directly about a Magic Quadrant or MarketScope?

An analyst sends vendors an email letting them know of the creation of a new Magic Quadrant or MarketScope and requesting the appropriate contact to work with through the research process. (If the analyst already knows the contact at a vendor, this step may not be necessary.) Once the contact is confirmed, the analyst sends an email that explains the market definition, inclusion criteria, evaluation criteria and weights, research process and timeline. For a new Magic Quadrant or MarketScope, this initial vendor notification usually occurs between 8 and 16 weeks before the planned publication date. This time frame varies based on project complexity. The timing may be shorter for MQs/MSs that have been published more than once.

Are vendors contacted if they are dropped from a Magic Quadrant or MarketScope when it is updated?

Yes, vendors are notified in advance of publication that they will not be represented in the updated research, along with an explanation of why they will not be included. 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.

Can a vendor "opt in" or "opt out" of a Magic Quadrant or MarketScope?

No. Vendors are included in the research only if they meet the market definition and inclusion criteria established by the analyst. If a vendor meets the inclusion criteria, our process requires that it be represented in the Magic Quadrant or MarketScope. If a vendor does not meet the criteria, they will not be included as a participating vendor in the Magic Quadrant or MarketScope.

Are analysts required to ask vendors for information when creating a Magic Quadrant or MarketScope project?

Analysts are not required to solicit information from vendors when creating a Magic Quadrant or MarketScope. The analyst determines whether he or she has sufficient information through regular contact with vendors and customers in that market to develop the document without this input. Analysts may request information from vendors in the form of a questionnaire or a request for a briefing; often, the content from these requests is used for other research deliverables in addition to the Magic Quadrant or MarketScope.

Are analysts limited in the number of questions they can ask in their surveys?

No. Analysts are not restricted in the number of questions they can ask in their surveys, but there is suggested guidance that they keep the questions to a minimum and only ask for details that will help to fill in the gaps. Generally, if an analyst asks many questions in a survey, the chances are that he or she will be using response data in more deliverables than just a Magic Quadrant or MarketScope.

If the analyst does not require specific input from vendors, when are vendors notified that they will be represented in a Magic Quadrant or MarketScope report?

Vendors that meet the inclusion criteria and market definition are notified at the beginning of a Magic Quadrant or MarketScope project. Analysts send all included vendors an email notifying them of their inclusion. The email includes the market definition, inclusion criteria, evaluation criteria, weightings for each criteria and expected publish date of the research. Vendors are also sent a copy of the draft content and asked to check it to ensure accuracy prior to publication; they are given five business days for this factual review. The review is not an opportunity for the vendor to disagree about placement within a quadrant. Vendor responses back to the analyst need to be in writing. Analysts are encouraged to notify vendors once they have a sense of the approximate date that the draft will be sent for factual review.

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

Analysts work with the information available to them from other sources, including publicly available information, feedback from our client base and industry contacts. The draft Magic Quadrant graphic or MarketScope table, along with specific content related to that vendor, is sent for factual review, following the standard process. A disclaimer is also added to the document:

> <Vendor X> did not respond to requests for supplemental information or to review the draft contents of this document. The Gartner analysis is therefore based on other credible sources, including <insert any sources that apply, such as the following:>
>
> - Public information
> - <Y> discussions with users of this product

What assurances do vendors have that vendor-supplied references will be contacted?

If an analyst asks for and receives vendor-supplied references, he/she is required to contact those references and notify the vendor if he/she is unable to reach any of them.

What opportunity do vendors have to review the Magic Quadrant or MarketScope before it is published?

Vendors are given five business days to review relevant draft content, including the complete graphic (for example, with all named "dots" in the Magic Quadrant or the entire MarketScope table) and vendor-specific commentary for factual accuracy.

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. Client status has no bearing on our research processes.

What if a participating vendor disagrees with its position 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 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 is the Office of the Ombudsman.

Is there any attempt to coordinate the timing for Magic Quadrants and MarketScopes in related topic areas?

No, due to the breadth of coverage of the various topic areas it is not possible to coordinate the related topics between the number of analysts who cover these areas and their other commitments. However, information gathered during the preparation of a Magic Quadrant or MarketScope is often shared across related topic areas.

Where can I find more information about the Magic Quadrant and MarketScope and other Gartner methodologies on gartner.com?

For more details about Gartner Methodologies, go to the Methodologies page.

What do I do if want to excerpt this research or buy reprints of it?

To excerpt research, email quote.requests@gartner.com, call +1 203 316 6178 or access the Quote Request details on g.com. To purchase reprints, contact reprints@gartner.com.

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