

This Policy addresses Gartner’s position on -- and documents a process for — client requests to include non-licensed third parties in Gartner Inquiry and Strategic Advisory Services (“SAS”) Engagements.

Policy Purpose:

The purpose of this Policy is to document a process for the review and oversight of all requests (typically submitted by Gartner Sales on behalf of their clients) to allow non-licensed third parties to participate in a client’s Inquiry session, SAS Internal Advisory Session or SAS Remote Advisory session.

Definitions:

- Participate means both physical attendance and “listening in” via teleconference.
- Non-Licensed Third Parties are individuals who are not employees of the client organization but who possess the attributes of a full-time employee equivalent (FTE), yet are not licensed to use the Gartner services. Examples may include: AR Firm representatives or outside consultants.
- Inquiry. Inquiry sessions are 2-way strategic conversations between Gartner research advisor(s) and authorized Licensed User(s) from the client organization. These sessions, which provide access to those Gartner research advisor(s) affiliated with the service purchased by the client, are intended for the Licensed User(s) of the client organization only. For additional guidance, please see the [Gartner Usage Policy](#) (formerly the Usage Guidelines for Gartner Services).
- SAS Internal Advisory Session engagement. Internal Strategic Advisory Services are internal advisory sessions at a client-selected location that enable a client to directly engage Gartner research advisor(s) for knowledge-based advisory or evaluation purposes. Client employees may attend an internal advisory session.
- SAS Remote Advisory Services. Similar to an internal advisory session, a remote advisory services session enables the client to directly engage a Gartner research advisor via teleconference or videoconference for knowledge-based advisory or evaluation purposes. Client employees may attend a remote internal advisory session.
- SAS External Speaking Engagement. These sessions consist of the direct engagement by client of Gartner research advisor(s) for some type of external speaking engagement at a Client-requested site. Client, at their discretion, may invite outside parties, including Third Parties.
- Vendor Briefings are *one-way* presentations by a client or non-client tech provider to Gartner research advisor(s). Participants on the provider side are not limited to Licensed Users; Third Parties may also participate at provider discretion, provided that they are announced at the outset of the session.

Policy Overview:

The Gartner business model is based on single-user licenses, which allow a client’s designated users (“Licensed Users”) to individually access Gartner Research and Inquiry, in accordance with the terms of their contract. Only Licensed User(s) from the client organization are authorized to access Gartner Research and participate in Inquiry, SAS Internal Advisory Sessions or SAS Remote Advisory Sessions.

Based on the above, Non-Licensed Third Parties:

- (i) May not access/use Gartner Research; and
- (ii) May not participate in/attend Inquiry sessions, SAS Internal Advisory Sessions or SAS Remote Advisory Sessions; but
- (iii) May attend External SAS Advisory Sessions and Vendor Briefings.

The Review Process:

In situations where a client asks Gartner to make an exception to this Policy and allow a Third Party to access and/or use Gartner Services other than Vendor Briefings and SAS External Speaking Engagement:

<u>Inquiry</u>	<u>Internal Advisory Session</u>	<u>Remote Advisory Services</u>
<p><u>Client must:</u></p> <ol style="list-style-type: none"> 1. Purchase a separate License to satisfy entitlement requirement* for Third Party FTE to attend Inquiry; 	<p><u>Client must:</u></p> <ol style="list-style-type: none"> 1. Arrange for Third Party FTE to sign a Non-Disclosure Agreement; 	<p><u>Client must:</u></p> <ol style="list-style-type: none"> 1. Arrange for Third Party to sign a Non-Disclosure Agreement;

<p>2. Arrange for Third Party FTE to sign a Non-Disclosure Agreement;</p> <p>3. Pass on to the Third Party FTE the Gartner Usage Policy; and</p> <p>4. Be liable in the event of the Third Party FTE’s misuse or non-compliance with the Services (email confirmation from client is sufficient).</p> <p>5. Upon termination of Third Party FTE’s contractual relationship, to promptly reassign the License to another employee or FTE in the client organization.</p> <p><u>Third-Party FTE must:</u></p> <ol style="list-style-type: none"> 1. Be dedicated to servicing only this client and be an FTE, meaning they must have company-assigned email address and business cards, and function, as a full-time employee (as opposed to a temporary contractor for a discrete term). 2. Agree to limit its use of the Gartner Services to the business needs of the client that purchased the Services. 3. Not share Gartner Research documents or Gartner username/password. <p>If all of the above criteria have been met, the Licensed User may schedule Inquiry sessions via the Talk with an Analyst function on gartner.com.</p>	<p>2. Be liable in the event of the Third Party FTE’s misuse or non-compliance with the Services (email confirmation from client is sufficient).</p> <p><u>Third-Party FTE must:</u></p> <p>Be dedicated to servicing only this client and be an FTE, meaning they must have company-assigned email address and business cards, and function, as a full-time employee (as opposed to a temporary contractor for a discrete term).</p> <p>If all of the above criteria have been met, the Third Party FTE may participate in an Internal Advisory Session.</p>	<p>2. Be liable in the event of the Third Party’s misuse or non-compliance with the Services (email confirmation from client is sufficient).</p> <p><u>Third-Party FTE must:</u></p> <p>Be dedicated to servicing only this client and be an FTE, meaning they must have company-assigned email address and business cards, and function, as a full-time employee (as opposed to a temporary contractor for a discrete term).</p> <p>If all of the above criteria have been met, the Third Party FTE may participate in a Remote Advisory Services session.</p>
--	---	---

*Since Inquiry is a Research deliverable, access to Research and Inquiry is determined by Research access entitlement.

NOTE: In no instance is it ever acceptable for a Licensed User to share its Username and Password with a non-Licensed User, either inside or outside the client organization. Please [click here](#) for further guidance.

If you have questions about this Policy or require additional guidance and assistance, please consult Usage.Guidance@gartner.com.

April 2018