

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:

This Policy documents a process for the review and oversight of all exception requests (typically submitted by Gartner Sales on behalf of their clients) regarding requests for a Third Party to participate in a client’s Inquiry session, SAS Internal Advisory Session or SAS Remote Advisory session.

Definitions:

- Participate means both physical attendance and/or “listening in” via teleconference.
- Third Party is an individual who is not an employee of the client organization but who fulfills the duties of an employee without being a fulltime employee of the client. Examples may include AR Firm representatives or outside consultants. Please note, these individuals may be working with multiple client organizations.
- 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) associated 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.
- 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.
- 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.

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, the following framework is applied and must be completed before access, participation or use occurs:

<u>Inquiry and G.com Access</u>	<u>Internal or Remote Advisory Session</u>
<p><u>Client must:</u></p> <ol style="list-style-type: none"> 1. Identify the third party by name, title and organization and proposed License to Gartner; 2. Assign the Third Party an email address , demonstrating the client has more than a short-term interest in a relationship with the Third Party; 3. Purchase a separate License to satisfy entitlement requirement* for Third Party; 4. Agree to pass on to the Third Party the Gartner Usage Policy, which the Third Party shall comply with; 5. Be liable in the event of the Third Party’s misuse or non-compliance with the Services (confirm through email confirmation from client); and 6. Upon termination of Third Party contractual relationship, to promptly reassign the License. License can be applied to another employee in the client organization, or other eligible third party as determined under this policy. Please note the license must remain in the same country as the former Licensed User, per the Gartner Usage Policy. 	<p><u>Client must:</u></p> <ol style="list-style-type: none"> 1. Identify the third party by name, title and organization to Gartner; 2. Assign the Third Party an email address, demonstrating the client has more than a short-term interest in a relationship with the Third Party; 3. Sign a Gartner Non-Disclosure Agreement; 4. Be liable in the event of the Third Party’s misuse or non-compliance with the Services (email confirmation from client is sufficient); and 5. Be liable in the event of the Third Party’s misuse or non-compliance with the Services (confirm through email confirmation from client). <p><u>Third-Party must:</u></p> <p>Agree to limit its use of the Gartner Services to the business needs of the client that purchased the Services.</p> <p>The third party may participate in the Internal Advisory Session/Remote Advisory Session if:</p> <ul style="list-style-type: none"> - All of the above criteria are met - Gartner determines that the third party is eligible to enter into a relationship with Gartner (based on a competitive and risk factor review).

<p>Third-Party must:</p> <p>Agree to limit its use of the Gartner Services solely for the business needs of the client that purchased the Services.</p> <p>Use only the client-assigned email address for their Gartner profile and gartner.com username so that usage can be audited and reported to the client if necessary.</p> <p>The third party may participate in the entitled services* if:</p> <ul style="list-style-type: none"> - All of the above criteria are met -Gartner determines that the third party is eligible to enter into a relationship with Gartner (based on a competitive and risk factor review as well as product eligibility). 	
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*Access to Research documents and Inquiry is determined by entitlement.

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

Send an email to Usage.Guidance@gartner.com if you have questions or need more guidance.

Revision History

Published Date	Reason for Revision
Oct-2019	Previous version
14-Mar-2022	Simplified the Policy Purpose description. Updated the Review Process – Inquiry section:

	<ul style="list-style-type: none">● Removed the Inquiry NDA requirement for third parties as terms are covered by the Gartner Usage Policy.● Added client must confirm the third party agrees to only use services to support the client. <p>Updated the broken Gartner Usage Policy link.</p>
31-Mar-2023	Refined definitions and simplified the review process, as well as added detail to third-party eligibility criteria.