Introduction: Why a Content Compliance Policy

Gartner, Inc. delivers actionable, objective insight to executives and their teams. Our expert guidance and tools enable faster, smarter decisions and stronger performance on an organization's most critical priorities. To protect this objectivity, we have strict standards for how others may externally use our content/intellectual property.

Gartner's intellectual property ("IP" or "Gartner content") is subject to trademark and copyright protections, regardless of where and how it is referenced. This policy (the "Policy") defines how you may use our content externally (outside of your organization). The Policy also applies to any third party that writes and/or promotes content on your behalf, including your partner organizations. All decisions are at the sole discretion of Gartner Content Compliance, or its delegates, and are final. For the purposes of the Policy, Gartner content includes, but is not limited to, the Gartner name, our logos, graphics, badges, images, trademarks, copyrights, and references to Gartner published research material and experts (including analysts, advisors, and researchers), consultants, and executive partners.

Clients may quote Gartner content internally without approval from Gartner Content Compliance, as long as they comply with the Gartner Usage Policy. Clearly label all such internal material as “For internal use only.”

Gartner, Inc. reserves the right to change its policies or explanations of its policies at any time, without notice.

Ready to Request Approval?

Check your access

You must have legitimate access to the Gartner content you want to display or quote to receive approval. If you are a licensed client or are quoting from a licensed reprint, you have legitimate access to Gartner client-only research. Everyone has legitimate access to externally facing Gartner content (for example, Gartner press releases, Smarter With Gartner posts, and Gartner Peer Insights reviews and ratings).

01 Identify Gartner Content
such as a quote or reference from content published on gartner.com

02 Draft Material(s)
in an editable format that includes the Gartner content

03 Submit Online
Identify Gartner Content

**Eligible content**
- Expert-opinion research:
  - Case Studies
  - Cool Vendors
  - Critical Capabilities
  - Gartner for Technical Professionals (GTP) research
  - Hype Cycle™
  - Magic Quadrant™
  - Market Guide
  - Market Share and Forecast
  - Peer & Practitioner Research
  - Supply Chain Top 25
  - TalentNeuron™
  - Testimonials
  - Thought Leadership
  - Vendor Rating
- User-generated content:
  - Gartner Digital Markets
  - Gartner Peer Insights™
- Other eligible content:
  - Gartner IDEAS Competitive Profiles
  - Gartner Glossary
  - Gartner Press Releases
  - Gartner Conference Presentations
  - Gartner Trademarks, Logos and Graphics
  - IT Key Metrics Data
  - Smarter With Gartner Posts

**Ineligible content**
- Custom Client Engagements (consulting engagements)
- Custom quotes
- Gartner Cloud Decisions
- Gartner expert weblogs
- Toolkits
Eligible content

Expert-opinion research:

Expert-opinion research is written by Gartner Research & Advisory experts. For this research, use verbatim, industry-general quotes, and properly attribute the research to Gartner.

Be sure to include the expert-opinion Objectivity Disclaimer if you promote inclusion in the report:

Gartner does not endorse any vendor, product or service depicted in its research publications, and does not advise technology users to select only those vendors with the highest ratings or other designation. Gartner research publications consist of the opinions of Gartner’s research organization and should not be construed as statements of fact. Gartner disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

Don’t use

• Content that is about specific companies.
• The research as an endorsement or a competitive weapon.

All claims of “validation”, “testament”, “evidence” (or other words with the same meaning) must appear as your company’s opinion and not as a Gartner endorsement. See examples.

• Any words or phrases that give the impression that you are “featured”, “highlighted”, “spotlighted” or imply any of these.
• Any text, references, or images to imply that inclusion is an award.

Look below for the type of report you want to quote. Follow the additional guidance for each.

Case Studies

• Use verbatim, industry-general quotes.
• Properly attribute the research to Gartner.
• Only cite archived research if you are using the research to provide a historical snapshot in time. Otherwise, do not cite it.
• If stating inclusion in the report, include the Objectivity Disclaimer.

Critical Capabilities

• When promoting inclusion, you may use words such as:
  – Acknowledged
  – Evaluated
  – Identified
  – Named
  – Placed
  – Positioned
  – Ranked
  – Recognized
  – References to placement (1st, 2nd, 3rd, highest)
• You may promote retrospective inclusion. Example:
  – ABC Company was ranked 1st in the New Tech Use Case for 3 consecutive years in the Gartner Critical Capabilities for XXX.
• Include the full name of the Use Case where you were ranked.

Cool Vendors

• Use verbatim, industry-general quotes.
• You may promote your designation as a Gartner Cool Vendor in perpetuity.
• Properly attribute the research to Gartner.
• If stating inclusion in the report, include the Objectivity Disclaimer.
• Use the Gartner Cool Vendor badge, from the year you were recognized, in approved collateral.
• Don’t reference stats from archived reports.
• If you are included in the “Where Are They Now?” section of a Cool Vendor report, you may not use the Gartner Cool Vendor badge from that report, or state that the mention designates you as a Cool Vendor again. Look below for the type of report you want to quote. Follow the additional guidance for each.

Use these quick tips to prepare your materials.
Content Compliance Policy (continued)

- Include the highest possible score for proper context (for example, 4.4 out of 5) for the Use Case you wish to highlight.
  - For the Additional Perspectives update report, also include the "as of date" for proper context.
- Don’t reference your scores from the actual critical capabilities table graphics. They are only intended to provide supporting data for the Use Case graphics.
- If stating inclusion in the report, include the Objectivity Disclaimer.

Gartner for Technical Professionals (GTP) research

Solution Comparisons
When promoting inclusion:
- You may reference your own overall score or individual scores.
  - Include the highest possible score for proper context.
- You may not use graphics from these report.
- If stating inclusion in the report, include the Objectivity Disclaimer.

Solution Scorecard
- If you reference your overall score, or your Required, Preferred, and Optional criteria scores, you must include the highest possible score for proper context.
- If stating inclusion in the report, include the Objectivity Disclaimer.

Hype Cycle™
- When promoting inclusion, you may use words such as:
  - Acknowledged
  - Identified
  - Named
  - Placed
  - Positioned
  - Recognized
- You may promote retrospective inclusion. Examples:
  - ABC Company has been named a Sample Vendor for 3 consecutive years in the Gartner Hype Cycle for XXX.
  - We were recognized again as a Sample Vendor in the Gartner Hype Cycle for XXX.
  - A Sample Vendor in the Gartner Market Guide for XXX for the 3rd time in a row.
- If stating inclusion in the report, include the Objectivity Disclaimer.

Magic Quadrant™
- When promoting inclusion, you may use words such as:
  - A Challenger/Leader/Niche Player/Visionary
  - Acknowledged
  - Evaluated
  - Furthest in vision (if true)
  - Furthest on Completeness of Vision axis (if true)
  - Highest in execution (if true)
  - Highest on Ability to Execute axis (if true)
  - Identified
  - Named
  - Placed
  - Positioned
  - Recognized
- You may promote retrospective inclusion, but it must be factually correct. Examples:
  - ABC Company has been named a Leader for 3 consecutive years in the Gartner Magic Quadrant for XXX.
  - We were recognized again as a Leader in the Gartner Magic Quadrant for XXX for the 9th time.
  - A Leader in the Gartner Magic Quadrant for XXX for the 3rd time in a row.

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Content Compliance Policy (continued)

• You may promote your placement on the X & Y axes. Examples:
  – ABC Company is highest in execution on the Gartner Magic Quadrant for XXX²
  – ABC Company is furthest in vision on the Gartner Magic Quadrant for XXX²
  – ABC Company’s Ability to Execute and Completeness of Vision are the reasons why it was named a Leader in the Gartner Magic Quadrant for XXX.
• If stating inclusion in the report, include the Objectivity Disclaimer.
• You may use the full “Magic Quadrant Description” to add context. Partial excerpting is prohibited.
• Avoid any words that imply inclusion is a stack ranking, such as #1, ranked, or scored.

Market Guide
• You may use words such as named, placed, positioned, acknowledged, recognized, and identified when promoting inclusion.
• You may promote retrospective inclusion. Examples:
  – ABC Company has been named a Representative Vendor for 3 consecutive years in the Gartner Market Guide for XXX.
  – We were recognized again as a Representative Vendor in the Gartner Market Guide for XXX.
  – A Representative Vendor in the Gartner Market Guide for XXX for the 3rd time in a row.
• If stating inclusion in the report, include the Objectivity Disclaimer.

Market Share and Forecast
Include:
• Region, time frame, what’s being calculated, and market segment/sub-segment.
• This disclaimer if you create a graphic or chart from these reports:
  – Charts/graphics created by [company name] based on Gartner research. Source: Gartner, Inc., [title], [expert name(s)], [publication date].
• This disclaimer if you perform your own calculations
  – Calculations performed by [company name].
• If stating inclusion in the report, include the Objectivity Disclaimer.

Avoid:
• 1:1 vendor comparisons (you may compare yourself to 2 or more of your competitors).
• Commingling Gartner Market Share and Forecast with content from any other source, including your own data points.

Peer & Practitioner Research
• Use verbatim, industry-general quotes.
• Properly attribute the research to Gartner.
• Only cite archived research if you are using the research to provide a historical snapshot in time. Otherwise, do not cite it.
• If stating inclusion in the report, include the Objectivity Disclaimer.
Supply Chain Top 25
• You may use words such as named, placed, positioned, acknowledged, recognized, ranked, highest, references to placement (1st, 2nd, 3rd), evaluated, and identified when promoting inclusion.
• You may promote retrospective inclusion.
• If stating inclusion in the report, include the Objectivity Disclaimer.

TalentNeuron™
Include:
• Region, time frame, what’s being calculated, and market segment/sub-segment.
• This disclaimer if you create a graphic or chart from these reports:
  – Charts/graphics created by [company name] based on Gartner research. Source: Gartner, Inc., [title], [expert name(s)], [publication date].
• This disclaimer if you perform your own calculations:
  – Calculations performed by [company name].
• If stating inclusion in the report, include the Objectivity Disclaimer.

Avoid:
• 1:1 vendor comparisons.
• Commingling TalentNeuron data with content from any other source, including your own data points.

Thought Leadership
• Use verbatim, industry-general quotes.
• Properly attribute the research to Gartner.
• Only cite archived research if you are using the research to provide a historical snapshot in time. Otherwise, do not cite it.
• If stating inclusion in the report, include the Objectivity Disclaimer.

Vendor Rating
• You may reference your Overall Rating or your Product/Service, Support/Account Management, Pricing Structure, Technology/Methodology, Strategy, Corporate Visibility ratings.
  – Include the highest possible score for proper context.
• Use verbatim, industry-general quotes.
• Properly attribute the research to Gartner.
• Only cite archived research if you are using the research to provide a historical snapshot in time. Otherwise, do not cite it.
• If stating inclusion in the report, include the Objectivity Disclaimer.

User-generated content
Gartner Digital Markets
Visit the Gartner Digital Markets Content Compliance Policy on Capterra, GetApp, and Software Advice for guidance on sharing Gartner Digital Markets content externally.

Gartner Peer Insights™
Visit the Gartner Peer Insights Technology Provider Tools Portal for guidance on sharing Gartner Peer Insights content externally.

Testimonials
If you are the subject of a Gartner testimonial, you may direct users to the official testimonials page on gartner.com. That content complies with Gartner’s guidelines for producing testimonials. You may not create your own testimonial that promotes your client relationship with Gartner.
Other eligible content

Gartner IDEAS Competitive Profiles

• The following are the ONLY ways you can externally share Gartner IDEAS Competitive Profiles. Client & Prospect Reports: in Requests for Proposal (RFPs), Requests for Information (RFIs), Invitations for Bid (IFBs), and Invitations to Bid (ITBs). You do not need pre-approval to do so. No other external use is allowed.
• Client & Prospect Reports generated by Gartner IDEAS Competitive Profiles may not be altered in any way and must be used in their entirety.
• Don’t commingle Gartner IDEAS Competitive Profiles data with any other source.

Gartner Glossary

References from the Gartner Glossary are permitted. Use the definition verbatim, and include an “as of” date that reflects when the definition appeared on gartner.com.

Gartner Press Releases

Gartner press releases are published by the Gartner Public Relations team. You may use these press releases as a source, but the press release must have been published within the past 12 months from your submission to Content Compliance for approval.

Example: If you submit a request on November 19, 2021, the Gartner Press Release must be dated November 19, 2020 or more recently.

Gartner Conference Presentations

Gartner conference presentations are presentations delivered by Gartner experts at the company’s many different global conferences. You may use these presentations as a source, but the presentation must have been delivered within the past 12 months from your submission to Content Compliance for approval.

Example: If you submit a request on November 19, 2021, the presentation must be dated November 19, 2020 or more recently.

Gartner Trademarks, Logos and Graphic

You may only use a Gartner trademark or graphic after you’ve secured express, written permission from Gartner Content Compliance or its delegates. Please reference: Proper use of Gartner Logos and Badges.

Trademarks

• Use the ® symbol on the first prominent use of the word “Gartner” and a ™ on the following trademarks:
  – Magic Quadrant
  – Hype Cycle
  – TalentNeuron
  – Peer Insights

• Example: Company ABC is a Leader in the 20XX Gartner® Magic Quadrant™ for Digital Commerce. Read what Gartner experts have to say about us!

• Use the following trademark legal lines:
  – [Magic Quadrant, Hype Cycle, TalentNeuron, Peer Insights] is a registered trademark of Gartner, Inc. and/or its affiliates and is used herein with permission. All rights reserved.
Logos

- Make all Gartner logos and badges secondary in position to your logo, and at least 10% smaller in size.
- Include the required clear space around Gartner logos and badges. Don’t bundle them next to your or any other logos.
- Use the following required trademark legal lines when using these Gartner trademarks.
  - Gartner Logo: GARTNER is a registered trademark and service mark of Gartner, Inc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.
  - Gartner Cool Vendor badge: The GARTNER COOL VENDOR badge is a trademark and service mark of Gartner, Inc. and/or its affiliates and is used herein with permission. All rights reserved. Gartner does not endorse any vendor, product or service depicted in its research publications and does not advise technology users to select only those vendors with the highest ratings or other designation. Gartner research publications consist of the opinions of Gartner’s Research & Advisory organization and should not be construed as statements of fact. Gartner disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.
- Don’t alter Gartner logos and badges in any way. This includes, but is not limited to, changes to font, color, size, and orientation.
- Don’t use Gartner logos or badges in:
  - Email signature blocks (except when using templates provided by Gartner)
  - Securities offerings documents
  - Annual reports

Graphics

Unless otherwise indicated, you must purchase a reprint if you would like to use any graphic that evaluates or otherwise lists organizations. If the Gartner content is ineligible for reprinting, then you may not use graphics from that content.

Reprinted graphics may only be used in:

- Homepage banners
- Registration web pages
- Social media (blogs, gifs, and graphics)
- PPT presentations
- Videos

Don’t alter any element of the graphic. Elements that may not be changed include typeface, font, proportion, orientation, and color.

Don’t use Gartner graphics in:

- Securities offerings documents
- Annual reports

IT Key Metrics Data

Materials and/or data in Gartner published IT Key Metrics Data (ITKMD) reports may be accessed by any client with access rights. However, only licensed users of Professional Services and the Professional Services Knowledge Specialist product (collectively, “PS”) may share with their clients or prospects (to a Limited Audience only) select results of ITKMD reports as long as they do not:

- Imply that the Gartner ITKMD methodology is one that the vendor follows itself in its own calculations;
- Benchmark customers’ data against ITKMD data; commingle ITKMD data with any other data; or
- Use ITKMD for setting outsourcing contract pricing with vendors.

Smarter With Gartner Posts

Smarter With Gartner posts are blog entries published by the Gartner Public Relations team. You may use these posts as a source, but the post must have been published within the past 12 months from your submission to Content Compliance for approval.

Example: If you submit a request on November 19, 2021, the post must be dated November 19, 2020 or more recently.
Ineligible content

Custom Client Engagements (Consulting Engagements)
You may not reference any custom Gartner client reports, surveys, or consulting deliverables. However, you may share the report or deliverable with:
• An outside auditor or accountant
• Third parties who have signed appropriate confidentiality agreements with the client and with whom the client has engaged to review or implement suggestions, or to further research the content contained in the deliverables
• Governmental or regulatory bodies as required by law
Under no circumstances may custom client reports, surveys or consulting deliverables be shared with potential investors in connection with any securities offering or quoted in whole or in part in any securities offering documents, or annual, quarterly or any other reports to stockholders.

Custom Quotes
Gartner does not provide custom quotes. Only content that has been published on gartner.com may be excerpted, this means that informal comments made by experts in any forum (for example, on an inquiry) are ineligible sources.

Gartner Cloud Decisions
Materials and/or data in Gartner Cloud Decisions are for internal, noncommercial use only by licensed users. External use, including commingling with other content, is not permitted.

Gartner Expert Weblogs
Gartner expert weblogs do not reflect the official position of Gartner Research & Advisory and represent an expert’s individual opinion. For that reason, they are not an eligible source.

Toolkits
Unless otherwise marked for external use, Gartner Toolkits are for internal, noncommercial use by the licensed Gartner client.
Content Compliance Policy (continued)

Draft Material(s)

Eligible material(s)

Academia (student thesis and higher education curricula)
Gartner both allows and encourages students and professors to quote from Gartner content. Learn The Essentials to familiarize yourself with what is allowed.

Conference/event materials
Use the below chart for a quick reference of which rules apply to each type of Conferences collateral.

Conference collateral

<table>
<thead>
<tr>
<th>R Required</th>
<th>P Permitted</th>
<th>NP Not Permitted</th>
<th>A Applicable</th>
<th>NA Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gartner Graphic (e.g. Magic Quadrant™)</td>
<td>Objective Disclaimer (if promoting inclusion)</td>
<td>Attribution</td>
<td>70/30 rule</td>
<td>Gartner Trademarks, badges, and logos</td>
</tr>
<tr>
<td>Printed collateral (Booth signage, ads)</td>
<td>NP</td>
<td>R</td>
<td>R</td>
<td>A</td>
</tr>
<tr>
<td>Digital collateral (Ads, presentations, websites, social media, emails campaigns)</td>
<td>P</td>
<td>R</td>
<td>R</td>
<td>A</td>
</tr>
<tr>
<td>Press releases promoting attendance</td>
<td>NP</td>
<td>R</td>
<td>R</td>
<td>NA</td>
</tr>
<tr>
<td>Room drop/Giveaways</td>
<td>NP</td>
<td>R</td>
<td>R</td>
<td>A</td>
</tr>
</tbody>
</table>

Limited-audience documents
Limited-audience documents may not be accessed by, or distributed to, the general public. These documents are available only to a limited audience of the client’s own subscribers, customers or prospects. Examples include:

• Requests for Proposals (RFPs), Requests for Information (RFIs), Requests for Quotes (RFQs), Invitations for Bid (IFBs), Invitations to Bid (ITBs)

• Equity and fixed income research reports and related marketing presentations of professional investment advisors

• Confidential investment banking pitch books used to market investment/financing opportunities (but not the offering documents themselves and not for mergers and acquisitions)

• Road show presentations for securities offerings (but not the offering documents themselves) as long as you have received prior approval for the Gartner references in the related registration statement, prospectus, private placement memorandum, confidential information memorandum or other offering document.
Content Compliance Policy (continued)

You do not need to submit limited-audience documents for approval as long as you follow this Content Compliance Policy and add the below required disclaimer:

All statements in this report attributable to Gartner represent [Enter Client Name's] interpretation of data, research opinion or viewpoints published as part of a syndicated subscription service by Gartner, Inc., and have not been reviewed by Gartner. Each Gartner publication speaks as of its original publication date (and not as of the date of this [presentation/report]). The opinions expressed in Gartner publications are not representations of fact and are subject to change without notice.

Marketing materials

Use the chart below to quickly understand which rules apply to each type of marketing collateral.

<table>
<thead>
<tr>
<th>Marketing collateral</th>
<th>Email</th>
<th>Press release</th>
<th>Blog</th>
<th>Social media post or graphic</th>
<th>Presentation</th>
<th>Banner</th>
<th>Video</th>
<th>Article/newsletter</th>
<th>Brochure/flyer/e-Book</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graphic</td>
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<td>Objectivity disclaimer*</td>
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<td>Link to a doc that includes it</td>
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<tr>
<td>70/30 rule</td>
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</tr>
</tbody>
</table>

Materials promoting expert speaking engagements

It must be clear that Gartner is being featured and is not co-hosting or co-sponsoring the product or event (for example, “An ABC Company newsletter, featuring Gartner Research” or “An ABC Company webcast, featuring Gartner Expert, John Doe”).

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Securities-related materials and earnings calls announcements/press releases

Please read this section carefully. Failure to secure written approval from Gartner Content Compliance before you file may result in an immediate quote ban of up to three months.

If you have legitimate access, you may use Gartner content in securities-related materials. Don’t use Gartner graphics, logos or badges.

For each filing:

- Submit your draft text that includes the Gartner content. If your filing is confidential, submit the paragraph or section containing the Gartner content, and the sections or paragraphs that immediately precede and follow it. This will help us review the Gartner reference in proper context. You may redact sensitive information.
- Include all required disclaimers, in addition to the following required securities-related disclaimer:
  - The Gartner content described herein (the “Gartner Content”) represents research opinion or viewpoints published, as part of a syndicated subscription service, by Gartner, Inc. (“Gartner”), and is not a representation of fact. Gartner Content speaks as of its original publication date (and not as of the date of this [type of filing]), and the opinions expressed in the Gartner Content are subject to change without notice.
  - Attribute the Gartner content appropriately, and include all required disclaimers when applicable (for example, when stating inclusion in a Magic Quadrant report, include the Objectivity Disclaimer).
  - Have an authorized member of your company sign an Indemnification Agreement (IA) protecting Gartner. Exhibit A of this agreement will include the Gartner reference exactly as you used it in your filing. IMPORTANT: We will not grant consent without a signed IA. Here is a list of templates for each type of permitted filing:
    - Annual, quarterly or other reports to security holders
    - Earnings call script and hypothetical Q&A’s
    - Earnings press releases
    - President’s and chairperson’s letters
    - Form 10
    - Prospectuses
    - Private placement memoranda
    - S1, S2, S3
    - 10K
    - 10Q
    - 20F
    - 8K

Watch this instructional video to help guide you on the do’s and don’ts for using Gartner content in your earnings call script and Q&A. IMPORTANT: Failure to secure Gartner’s pre-approval may result in measures that could include an immediate quote ban and reprints black-out of up to three months.

Ineligible material(s)

Corporate boilerplates

Gartner content may not be used in your company’s corporate boilerplate.

Litigation, takeovers, antitrust/competition filings

Note that S4s and similar documents are not listed as eligible content. This is because we don’t allow Gartner content to be used in competition law matters, such as joint venture filings, acquisitions, or mergers. We also don’t allow Gartner content to appear in litigation materials.

Submit online

Submit your request to use Gartner content externally (outside of your organization).

For new requests, include:

- A pdf of the Gartner source or a link to the Gartner content on gartner.com
- Your draft material highlighting how you plan to use the Gartner content.

Submit this in an editable format so we can amend your collateral to make it comply with this Policy, if necessary. Formats accepted are Word, pdf, and Google doc.
The Essentials

Use verbatim quotes
You must use verbatim quotes when excerpting from any Gartner content, including expert-opinion research and user-generated content reviews. We don’t allow paraphrasing because it could alter the meaning of the published content.

Use market-general quotes from expert-opinion research
You may use “market-general quotes” — quotes from expert-opinion research that applies to the market as a whole.

Comply with 30/70 rule for expert-opinion content
If you use Gartner expert-opinion content in your collateral, make sure that it constitutes no more than 30% of the total collateral content. For example, if you use expert-opinion content in a 10-slide deck, the Gartner references must not appear on more than 3 slides. Read more here.

Delineate between Gartner and our competitors
You may display Gartner content alongside Gartner competitor content; however, you must clearly distinguish the Gartner content from other content. Do not compare Gartner methodologies with those of our competitors, or create a side-by-side comparison between Gartner graphics and those of our competitors. Examples.

We do not allow promotion on websites of third-parties that compete with Gartner. Why?

Include attribution
Always attribute Gartner content (quotes, excerpts, references, trademarks, and graphics) to Gartner, and only cite from eligible sources.

Make sure to:
• Identify “Gartner” or “Gartner, Inc.” as the source; and
• Include the title of the Gartner content and the date it was published.

Below are examples that you may use or draw from, but as long as you include the required elements identified above, you may format them as you wish.

• Gartner Reports: Gartner, [Title of research document], [Author Name(s)], [Publication date]
• Gartner Conference Presentations: Gartner, [Name of Gartner Conference] Presentation, [Title of presentation], [Author name(s)], [Conference dates]
• Gartner Press Releases: Gartner Press Release, “[Title of Gartner press release],” [Date issued], [URL to press release on gartner.com]
• Smarter With Gartner Posts: Smarter With Gartner, “[Title of the Smarter With Gartner post],” [Date issued], [URL to post on gartner.com]
• Gartner IT Glossary Terms: Gartner IT Glossary, “[Glossary term],” [Date], [URL to term on gartner.com]
Describe Gartner and Gartner Peer Insights™ appropriately
Describe them this way:

**Gartner**
Gartner delivers actionable, objective insight to executives and their teams. Its expert guidance and tools enable faster, smarter decisions and stronger performance on an organization’s mission-critical priorities.

**Gartner Peer Insights™**
Gartner Peer Insights is a public platform that offers verified, first-hand reviews of enterprise software and services from experienced IT professionals.

**Avoid endorsement and criticism**
You may not use Gartner content in any manner that gives the impression of an endorsement or that criticizes another company. [Examples and scenarios.]

**Avoid company-specific quotes**
You may not use expert-opinion quotes that are specific to a company, product or service.

**Avoid informal expert quotes**
You may not quote from comments that Gartner experts made on social media, in response to client inquiries, or other interactions.

**Avoid commercialization/monetization of Gartner content**
You may not use Gartner content in any manner that competes with a Gartner product or offering. You also may not resell, redistribute, or charge for access to Gartner content without the express written consent of Gartner.

**Don’t use Gartner content in litigation/antitrust/competition law matters**
We do not allow external use of Gartner IP in connection with 1) corporate takeovers; 2) federal, state, or international trademark application filings; 3) litigation or enforcement actions; or 4) antitrust or competition law matters (including but not limited to merger or joint venture filings).

However, to the extent you are compelled by court order or other legal obligation to produce Gartner IP, you must:

- If you already have a protective court order, identify for Gartner the documents that you believe must be produced and the justification for why you believe each document is responsive to a particular request, at least 45 days before you are required to produce the Gartner document(s);
- If you do not have a protective court order, provide Gartner at least 60 days’ advance notice to move in the appropriate court for one; and
- In the event that you produce a Gartner document, designate it “Highly Confidential — Attorneys’ Eyes Only” or, if that designation is not available, the most protective designation of confidentiality pursuant to a protective order that has been entered by the court or regulator in the applicable litigation or enforcement action.
Addressing Misuse

Gartner has strict standards that govern all use of our content. We protect ourselves against misuse and reserve the right to take appropriate steps to address any misuse. Gartner may also seek additional remedies available under contract, trademark, copyright, and other applicable law.

Our standard practice is to keep all interactions related to misuse confidential, unless we are compelled by legal obligation to disclose it. If the misuse is especially egregious, we may post about it on the Ombuds blog. We do not disclose the identities of the individuals or companies who bring misuse to our attention.

Gartner Content Compliance investigates each reported concern and takes appropriate actions we deem necessary to address misuse. Read the Misuse Assessment Guide to understand how Gartner classifies various forms of misuse. Content Compliance may also require the violating company to implement corrective actions, or may place the company on probation or a quote ban.

Corrective Actions

Corrective actions Gartner may take when misuse has occurred include but are not limited to requiring the offending company to:

- Issue a company-wide email to all employees reminding them of their contractual obligation to follow the Gartner Content Compliance Policy
- Send a “correction” email to all recipients of a non-compliant email communication
- Schedule a compliance training module for all employees
- Take down or amend the non-compliant collateral (for example, a press release or a blog post).

Quote Bans and Probation

Gartner reserves the right to issue “quote bans” for misuse of our content, which require the offending company to stop quoting Gartner material for a period of up to three months, among other punitive measures. Gartner may issue more than one quote ban on a company at the same time. Carefully review the Misuse Assessment Guide to understand how Gartner classifies misuse.

For misuse that does not rise to the level that would warrant a quote ban, Gartner may impose a quote “probation” of up to six months. IMPORTANT: Multiple probations may result in a quote ban.

If you suspect misuse, report it on the online submission form.
FAQ

Are there rules about quoting Gartner content inside my company?
Yes, the Gartner Usage Policy applies.

Are Gartner experts and sales reps authorized to approve my external-use request?
No. Only a member of the Gartner Content Compliance team or its delegates (non-Content Compliance associates who are trained on this Policy) may approve external use requests.

Why doesn’t Gartner let me use a verbatim quote about my company from expert-opinion research?
Company-specific quotes may appear endorsing when used outside of their original context and in provider materials. This could compromise Gartner’s objectivity.

Why won’t Gartner allow me to include the Gartner logo, reference to Gartner expert-opinion research or a link to our licensed reprint in my email signature?
This rule exists to delineate your brand from the Gartner brand. We consider everything under your closing salutation to represent your company’s branding.

Why do I need to purchase reprint distribution rights for some graphics and not others?
Graphics that list, recognize, or evaluate providers must include the full report for the complete context and analysis so end users can make informed purchasing decisions.

What is “Gartner Foundational” research?
Gartner Foundational research consists of published documents that have been reviewed at the time they would normally be archived and deemed to remain relevant and timely (for example, it has not been superseded by more up-to-date research).

Is this Policy offered in any other languages?
Yes. This Policy is currently available in English, Japanese and Chinese.

I’d like to quote from a Gartner Peer Insights review. May I correct obvious typos?
Yes, if you link back to the original review and indicate that it has been corrected (for example, using brackets to fix spacing errors or typos in acronyms). You may not make any changes that alter any substance of reviews.

What is the proper way to refer to Gartner?
See Describe Gartner and Gartner Peer Insights appropriately under The Essentials.
FAQ

I reported suspected misuse; will you update me on the outcome? Will you publicize or disclose that I brought it forward?

Thank you for alerting us to the suspected misuse and helping Gartner maintain our objectivity. Our standard practice is to keep all interactions confidential, unless we are compelled by legal obligation to disclose it. Remember, just because we don’t publicize the imposed penalties does not mean that Content Compliance did not investigate and take action that we felt was necessary to rectify the misuse. If the misuse is especially egregious, we may create a post about it for the Ombuds blog.

We do not disclose the identities of those who bring forward suspected misuse, unless we are compelled by legal obligation to disclose them. Gartner Content Compliance alerts individuals who bring forward suspected misuse when the issue has been addressed.

What happens if I don’t comply with the Policy?

This depends on the severity of the misuse (see the Misuse Assessment Guide).

Why do I have to comply if my competitors don’t?

They do, too! If you suspect misuse, please report it online. We will investigate and take action that we feel is necessary to rectify the misuse.

How do I report suspected misuse?

Please use our online submission form.