

Gartner Non-Disclosure Agreement (NDA) External Policy and Process

NDA Policy

Gartner's business depends not only on the free flow of information and opinion, but also on our ability to be responsible stewards of confidential information. Vendors and end-users ask Gartner analysts on occasion to agree to NDAs before communicating information they regard as confidential. This policy discusses the typical situations in which our analysts may be asked to enter into NDAs, and the policy and process for dealing with such requests.

A. Written NDAs for Vendor Briefings (VBs)

Gartner's policy is not to enter into NDAs for vendor briefings, as we want our analysts to be able to freely use and write about the information they collect outside of contractual client services – just as in the news industry, everything is “on the record”. We will consider exceptions to this policy for a maximum of **45 days** when information is embargoed pending an upcoming event. When such an exception is made, only Gartner NDA paperwork may be used, as it enables Gartner to limit the scope of the NDA to specific information imparted during the vendor briefing and to a maximum duration of **45 days**. Alternatively, the analysts and vendors can postpone the vendor briefing until the embargo is lifted.

B. Verbal NDAs for Vendor Briefings

During the course of a briefing, vendors occasionally ask participating analysts to verbally agree not to disclose certain information deemed confidential. If the analysts agree to receive information based on such a verbal agreement, it is critical for the vendor to specifically identify the information deemed to be confidential. Any such verbal commitment will be valid for a maximum of **45 days** following the briefing.

C. Client Interaction that falls outside of a Vendor Briefing, Inquiry or Strategic Advisory Services (SAS)

If a vendor or end-user wishes to have a written NDA in place in connection with a client interaction that falls outside of a vendor briefing, inquiry or SAS, it is their responsibility to make the request and sign the NDA document prior to the client interaction taking place. Gartner will enter into an NDA for a client interaction for a maximum period of **1 year**. Only Gartner NDA paperwork may be used, as it enables Gartner to limit the scope of the NDA to specific information imparted during the client interaction and to a maximum confidentiality period of **1 year**.

Situations in which NDAs Will Not Be Signed

Confidential client information exchanged during an inquiry or SAS is covered under the confidentiality terms of the Gartner Master Client Agreement. An additional confidentiality agreement is unnecessary, and will not be entered into. It is the client's responsibility to identify information as confidential. When in doubt, the vendor or end-user should state what information is confidential before beginning the session.

Best Practices for NDAs

- 1) Submit confidentiality requests well in advance to vendor.briefings@gartner.com. This allows ample time to formalize necessary paperwork.
- 2) Clearly specify the confidential content.
 - ◆ Note:
 - Only Gartner NDA paperwork is approved for usage
 - Only Gartner Research Vice Presidents or above sign NDAs
- 3) For Gartner clients, review the Confidentiality provision of the Gartner Master Client Agreement.
 - ◆ Note: vendor briefings are not covered under Gartner Master Client Agreements
- 4) Err on the side of caution by not releasing confidential information until terms are finalized.
- 5) When uncertain, discuss the situation with the analyst.
- 6)

Process for signed NDAs

- 1) Vendor or end-user submits request for signed NDA to vendor.briefings@gartner.com.
- 2) The Vendor Briefings team reviews and delivers the request to the analysts who accept or reject the request.
- 3) For accepted requests both the vendor or end-user and a Gartner Research Vice President or above sign the Gartner NDA paperwork.
- 4) The Vendor Briefings team supplies the vendor or end-user with a signed electronic copy prior to the sharing of the confidential content.

Submit questions to:

vendor.briefings@gartner.com or telephone +1 203 316 6144