

**GROUP 73001 – INFORMATION ADVISORY SERVICES**

**Contract PS57647**

**GARTNER**

**NYS 2012 NET PRICE LIST**

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## 1.0 Introduction

Gartner acts as an independent objective advisor to NYS for information technology (IT) decision making and planning. Gartner is not a provider of any hardware, software, system integration, and implementation services. Gartner provides information about vendor viability, product capability, pricing benchmarks, promotional marketing activities, technology trends, industry (other states) experiences and proven management practices that maximize value from IT investments. Gartner intelligence comes from working with over 10,000 client organizations including most branches of the federal government and the majority of states. This unsurpassed intelligence on IT is compiled and offered to clients by approximately 1,000 information technology analysts and consultants. Our information allows NYS decision makers the ability to lower the cost of their procurements, choose products that are a best fit for their requirements, negotiate more favorable terms, avoid undue technical support costs and reduce the risks associated with making IT decisions.

Gartner offers NYS a variety of research and advisory service products under NYS contract PS57647:

- original research delivered over the Internet (gartner.com) on a subscription basis
- telephone consultations (typically 30–45 minutes) to assist subscribers to apply the research content to their needs (over 100,000 per year)
- telephone analyst briefings to provide ongoing technology education
- decision support models
- quantitative comparative assessments (benchmarks) to understand costs, identify areas of industry leadership and others for continuous improvement
- conferences and symposia to provide peer networking and educational opportunities
- custom focused research, analysis, or advice (Consultant) that extends or further applies our intelligence or transfer knowledge on industry leading IT management practices to NYS on topics that are featured in our research

## 2.0 Terms and Conditions

See attached.

## 3.0 Gartner Research

With more than 600 analysts worldwide, over 100,000 client inquiries per year, and more than 80,000 pages of published original research, we are by far the world's most valuable source of IT knowledge. Gartner Research clients benefit from saving time and money, gaining a true global perspective, and from leveraging the knowledge and advice that only our size and experience can provide.

Gartner helps clients succeed by providing solutions to a variety of business and technology challenges, such as ensuring that technology supports business strategy, making the right decisions, acquiring and retaining customers, understanding and prospering in changing markets, and recognizing and exploiting new opportunities.

Gartner Research provides analysis and findings based on (1) a wealth of data and concise methodologies, (2) recommendations and strategies based on firsthand experience, and (3) advice and counsel through our inquiry programs. All of this is delivered through five primary Research products:

- Gartner for IT Executives Programs
- Gartner for IT Leaders
- Core Research
- Industry Advisory Services
- Consultant Advisory Services

### 3.1 Core Connect Research

Core Connect Research is a comprehensive program designed to help professionals achieve tangible business results. Clients receive instant access to the world's foremost repository of expert analysis and opinion on everything important in IT including searchable databases of cutting-edge research, customized alerts that keep clients up-to-speed—and even personal consults with Gartner's team of world-class analysts. This is the single most valuable IT program in the world. Nothing else compares when it comes to assisting client users generate business impact.

Core Connect Research is a service that provides research and advice about information technology for decision makers. Core Research provides clients with the base of knowledge and advice needed to capitalize on IT technologies and markets.

There are two levels of Licensed User access to Core Connect Research: Reference and Advisor.

- The first level, called **Reference**, will provide access to all Gartner Core Research Focus Areas, Peer Connect, Webinars, and includes Web-based access (on gartner.com) to all Gartner research, including more than 30,000 documents produced by more than 200 Gartner research programs.
- The second level, called **Advisor**, will provide the same access to Peer Connect, Webinars, and written research as the Reference level, plus un-metered analyst inquiry privileges, an audio subscription to Talking Technology, and one event ticket to any of Gartner's theme-focused events.

#### 3.1.1 Core Connect Reference Deliverables

- **Gartner Core Connect Web Pages**—Provides access to a knowledgebase and broad range of technology topics for technology leaders.
- A Range of Written Research Reports, such as:
  - **Published Research**—Covers companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
  - **Vendor and Product Ratings**—Provides a holistic view of IT vendors.
  - **Special Reports**—Cover underlying themes that cut across technology research.

- **Peer Connect**—A secure online network of IT professionals who can access and leverage the collective experience of their peers.
- **Webinars**—Periodic Web conferences where Gartner analysts speak on timely topics in information technology and then solicit questions from listeners.

Note: Unless otherwise provided above, use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

### 3.1.2 Core Connect Advisor Deliverables

- **Gartner Core Connect Web Pages**—Provides access to a knowledgebase and broad range of technology topics for technology leaders.
- **A Range of Written Research Reports**, such as:
  - **Published Research**—Covers companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
  - **Vendor and Product Ratings**—Provides a holistic view of IT vendors.
  - **Special Reports**—Cover underlying themes that cut across technology research.
- **Peer Connect**—A secure online network of IT professionals who can access and leverage the collective experience of their peers.
- **Webinars**—Periodic Web conferences where Gartner analysts speak on timely topics in information technology and then solicit questions from listeners.
- **Standard Analyst Inquiry**—Licensed Users may engage with a Gartner Analyst to: (i) discuss a Gartner Research document published within the scope of their specific Service, and/or (ii) apply a Gartner Research document to a related issue that their company is facing. Typical inquiry sessions can take up to 30 (thirty) minutes of an Analyst's time. Standard Analyst Inquiry provides basic technology reviews of business-related documents that are 20 (twenty) pages or less, and take up to 60 (sixty) minutes of an Analyst's time. Inquiries requiring additional analysis or research by the Analyst are not included.
- **Talking Technology**—Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on gartner.com or downloaded to listen to in MP3 format.
- **Summit Event Ticket**—Admission to one (1) Gartner Summit Conference. Third day "Best Practice, Methodology and Implementation Days" at EMEA Summits, as well as other special programs, Gartner Seminars, tutorials, and workshops are not included in the Summit Ticket deliverable and may require an additional fee. Tickets are transferable within the Client organization but may not be transferred to another company.

Note: Unless otherwise provided above, use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

## 3.2 Core Research

Core Research is a comprehensive program designed to help professionals achieve tangible business results. Clients receive instant access to the world's foremost repository of expert analysis and opinion on everything important in IT including searchable databases of cutting-edge research, customized alerts that keep clients up-to-speed—and even personal consults

with Gartner's team of world-class analysts. This is the single most valuable IT program in the world. Nothing else compares when it comes to assisting client users generate business impact.

Core Research is a service that provides research and advice about information technology for decision makers. Core Research provides clients with the base of knowledge and advice needed to capitalize on IT technologies and markets.

There are two levels of Licensed User access to Core Research: Reference and Advisor.

- The first level, called **Reference**, will provide access to all Gartner Core Research Focus Areas, and includes Web-based access (on gartner.com) to all Gartner research, including more than 30,000 documents produced by more than 200 Gartner research programs.
- The second level, called **Advisor**, will provide the same access to written research as the Reference level, plus un-metered analyst inquiry privileges, access to all audio teleconferences, an audio subscription to Talking Technology, and one event ticket to any of Gartner's theme-focused events.

### 3.2.1 Standard Analyst Inquiry

Provides the individually named licensed users with access to Gartner analysts for telephone inquiry sessions for the User's individual business purposes for the benefit of Client. Inquiry sessions are related only to the interpretation or applications of published Gartner Research and are based on applicable Research Service scope of coverage, as determined by Gartner. Typically inquiry sessions can take up to 30 minutes of an analyst's time, which may be extended at the analyst's discretion. Inquiries requiring additional analysis or research by the analyst are not included. Additionally, Standard Analyst Inquiry for Core Research provides basic technology reviews of business related documents that are 20 pages or less and take up to 60 minutes of an analyst's time. Examples of documents include requests for proposals, marketing or business plans, policies and procurement agreements.

### 3.2.2 Core Research **Reference** Deliverables

Deliverables include a range of written reports, such as:

- **Spotlights**—Reflect hot client issues, consider the issues from several different perspectives and tie together research from all the Core Research Deliverables.
- **Special Reports**—Cover underlying research themes that cut across technology or industry-specific research, or provide in-depth strategic analysis of trends, industry developments, vendors, products and services.
- **Published Research**—Focus on companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
- **Alerts**—Event-driven bulletins addressing each of the IT and telecom markets.
- **NewsTakes**—Industry-focused newsletters providing up-to-the-minute analysis on the top stories in the hardware and semiconductor markets, capturing recent announcements and the potential impact on the market.

**Note:** You must be an authorized Licensed User to access Gartner Research Services, including Analyst Inquiry. As detailed in the **Usage Guidelines for Gartner Services** ("**Guidelines**"), which are accessible to all Licensed Users via the "Policies" section of [www.gartner.com](http://www.gartner.com), User Passwords and Research documents may not be shared with non-Licensed Users. Gartner monitors client usage patterns. Unusual or excessive usage patterns may be audited in accordance with the Usage terms herein. Services are to be used for each Licensed User's individual business

purposes for the benefit of the Licensed User. Gartner periodically updates Service names and deliverables to reflect client needs and market relevancy.

### 3.2.3 Core Research Advisor Deliverables

In addition to the Core Research reports for Licensed Reference Users, outlined above, each Licensed Advisor User will receive the following:

- **Core Research Advisor Analyst Inquiry**—Provides Licensed Users with access to Gartner Analysts who are associated with the Service purchased by Client. Participation in Standard Analyst Inquiry as part of this Service is subject to the following terms:
  - Licensed Users may engage with a Gartner Analyst: (i) to discuss a Gartner Research document published within the scope of their specific Service, and/or (ii) to apply a Gartner Research document to a related issue that their company is facing.
  - Participation in Analyst Inquiry is limited to the Licensed User(s) and the Gartner Analyst only (i.e., non-Users, either inside or outside of the Client company, may not attend or otherwise participate on the call).
  - Analyst Inquiry sessions may take up to 30 minutes of an Analyst's time.
  - Analyst Inquiry sessions may also be used to request basic technology reviews of business-related documents that are 20 pages or less and take up to 60 minutes of an Analyst's time. Examples of these documents include requests for proposals, marketing or business plans and procurement agreements.
- **Teleconferences**—Periodic “telephone meetings” on pressing, timely issues. Gartner Analysts speak on these topics and then poll the listeners.
- **Talking Technology Series**—A monthly audio news program containing interviews with Gartner analysts and other industry experts on timely topics in information technology.
- **Summit Event Ticket**—Admission to one (1) Gartner Summit Conference. Please note that third day “Best Practice, Methodology and Implementation Days” at EMEA Summits, as well as other special programs, Gartner Seminars, tutorials and workshops are not included in the Summit Ticket deliverable and may require an additional fee.

### Usage Guidelines for Gartner Services

- **Services** are the subscription-based research and related services described herein. Service Descriptions, Names and Levels of Access are as detailed for each product offering. Gartner may periodically update the names and the deliverables for each Service.
- **Modification of Services by Gartner.** In order to remain current and timely in its Service offerings, Gartner may make minor modifications from time to time in the content of any Service. If Gartner discontinues any Service in its entirety, Client may, at its option, receive a substitute Service, or obtain a pro rata refund of the fees paid for the discontinued Service.
- **User** is the individual named in the Client Purchase Order (each a “Licensed User”) who is licensed to use the Services. Client will limit access to the Services to the agreed upon number of Users.

**Ownership and Use of the Services.** Gartner owns and retains all rights to the Services not expressly granted to Client. Only the individuals named in the Client Purchase Order (each a “Licensed User”) may access the Services. Each Licensed User will be issued a unique

password, which may not be shared. Client agrees to review and comply with the **Usage Guidelines for Gartner Services** ("**Guidelines**"), which are accessible to all Licensed Users via the "Policies" section of [www.gartner.com](http://www.gartner.com). Among other things, these Guidelines describe how Client may substitute Licensed Users, excerpt from and/or share Gartner research documents within the Client organization, and quote or excerpt from the Services externally.

Client may not redistribute copies of individual research documents, by electronic means or otherwise, to non-Users without Gartner's prior written permission. Users may not reproduce or distribute the Services externally without Gartner's prior written permission, except for external distribution, in their entirety only, of reprints of individual documents purchased by Client. Client may excerpt from the Services for external use only if Client obtains the prior written approval of Gartner Vendor Relations, at [vendor.relations@gartner.com](mailto:vendor.relations@gartner.com). Any approved external use of the Services must comply with Gartner's *Copyright and Quote Policy* which may be viewed on the Gartner Vendor Relations section of [www.gartner.com](http://www.gartner.com). Services may not be stored by Client on any information storage and retrieval system.

**Access to the Services.** ID's for access to Gartner Core Research and analyst inquiry may not be shared. Access to the Services is restricted to the number of named individuals (each a "User") as identified in the Client Purchase Order.

**Monitoring of Usage.** The Client acknowledges and agrees to inform all Users that Gartner may monitor activity on Gartner's website, including access to, and use of, the Services by individuals. Upon request, Client agrees to provide Gartner with assurance from a responsible Contract Officer (or other relevant evidence) of compliance with these usage terms.

**DISCLAIMER OF WARRANTIES.** THE SERVICES ARE PROVIDED ON AN "AS IS" BASIS, AND GARTNER EXPRESSLY DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, STATUTORY OR OTHERWISE, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE OR AS TO ACCURACY, COMPLETENESS OR ADEQUACY OF INFORMATION. CLIENT RECOGNIZES THE UNCERTAINTIES INHERENT IN ANY ANALYSIS OR INFORMATION THAT MAY BE PROVIDED AS PART OF THE SERVICES, AND ACKNOWLEDGES THAT THE SERVICES ARE NOT A SUBSTITUTE FOR ITS OWN INDEPENDENT EVALUATION AND ANALYSIS AND SHOULD NOT BE CONSIDERED A RECOMMENDATION TO PURSUE ANY COURSE OF ACTION. GARTNER SHALL NOT BE LIABLE FOR ANY ACTIONS OR DECISIONS THAT CLIENT MAY TAKE BASED ON THE SERVICES OR ANY INFORMATION OR DATA CONTAINED THEREIN. CLIENT UNDERSTANDS THAT IT ASSUMES THE ENTIRE RISK WITH RESPECT TO THE USE OF THE SERVICES.

**Client Confidential Information.** Gartner agrees to keep confidential any Client-specific information communicated by Client to Gartner that is (i) clearly marked confidential if provided in written form, or (ii) preceded by a statement that such information is confidential, if provided in oral form, and such statement is confirmed in writing within 15 days of its initial disclosure. This obligation of confidence shall not apply to any information that: (1) is in the public domain at the time of its communication; (2) is independently developed by Gartner; (3) entered the public domain through no fault of Gartner subsequent to Client's communication to Gartner; (4) is in Gartner's possession free of any obligation of confidence at the time of Client's communication to Gartner; or (5) is communicated by the Client to a third party free of any obligation of confidence. Additionally, Gartner may disclose such information to the extent required by legal process. Client acknowledges that Gartner is in the business of researching and analyzing information technology and this obligation of confidence shall not apply to information obtained by Gartner's research, analysis or consulting organization(s) from other sources.

**Table 1. Core Connect Research Pricing—New Clients**

# of Users	Reference: Price per User	Advisor: Price per User
Single	\$17,870	\$27,770
Multi User	\$10,390	\$20,410

**Notes:**

1. CORE Connect contributes (“counts”) toward multi user price levels on other Gartner Product offerings within the same agency and services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
2. All other Gartner product offerings within the same agency, excluding add-on services, contribute (“count”) toward multi user/member pricing for CORE Connect.
3. All Memberships commence on the first of the calendar month.
4. All Memberships require an annual contract.
5. Pricing is for annual Membership.

**Core Research—Renewals Only**

Core Research is a comprehensive program designed to help professionals achieve tangible business results. Clients receive instant access to the world's foremost repository of expert analysis and opinion on everything important in IT including searchable databases of cutting-edge research, customized alerts that keep clients up-to-speed—and even personal consults with Gartner’s team of world-class analysts. This is the single most valuable IT program in the world. Nothing else compares when it comes to assisting client users generate business impact. **Error! Reference source not found.** that follows shows pricing available to existing clients **for renewal only** as of 1 February 2007.

**Table 2. Core Research and Core Connect Research: Pricing—Renewal Only\***

# of Users	Core Research Reference: Price per User	Core Research Advisor: Price per User	Core Connect Reference: Price per User	Core Connect Advisor: Price per User
1	\$11,540	\$19,450	\$13,200	\$20,410
2	\$10,390	\$19,450	\$10,390	\$20,410
5	\$10,390	\$19,450	\$10,390	\$20,410
10	\$8,640	\$10,820	\$10,300	\$12,420
25	\$6,050	\$9,220	\$7,680	\$10,830
50	\$4,890	\$8,080	\$6,520	\$9,680
100	\$3,750	\$7,060	\$5,370	\$8,660

**Notes:**

1. Aggregate CORE Reference and Advisor Seats at the Agency/Bureau/Operating Unit level only—on a single Purchase Order—to determine price per seat.
2. CORE seats contribute (“count”) toward multi-user price level on all other Gartner product offerings within the same agency and services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
3. All other Gartner product offerings within the same agency, excluding add-on services, contribute (“count”) toward determining CORE quantity/unit price level.
4. All Memberships commence on the first of the calendar month.
5. All Memberships require an annual contract

6. Pricing is for annual Membership.
7. Effective February 1, 2007, the above pricing structure is no longer available to new clients.
8. Renewals of existing seats are permitted, at the seat quantity/price level in effect as of January 31, 2007, unless the renewal seat aggregate drops to a lower seat quantity.
9. Conversely, seat additions that increase or raise the aggregate to a new or higher seat quantity are no longer permitted. Additional seats that satisfy the aggregation requirements must be priced at the "existing" (prior) price level.

**Note:** You must be an authorized Licensed User to access Gartner Research Services, including Analyst Inquiry. Unless otherwise provided above, passwords, Research documents and Analyst Inquiry may not be shared with non-Users.

As detailed in the **Usage Guidelines for Gartner Services ("Guidelines")**, which are accessible to all Licensed Users via the "Policies" section of [www.gartner.com](http://www.gartner.com), User Passwords and Research documents may not be shared with non-Licensed Users. Gartner monitors client usage patterns. Unusual or excessive usage patterns may be audited in accordance with the Usage terms herein. Services are to be used for each Licensed User's individual business purposes for the benefit of the Licensed User. Gartner periodically updates Service names and deliverables to reflect client needs and market relevancy.

### 3.3 Consultant Advisory Service (CAS)

For a variety of reasons, there are times when NYS agencies need to extend (get more detailed, focused or customized research, analysis or advice) beyond the support they can get from standard analyst inquiry. Client needs may dictate a written report, an on site presentation or detailed data gathering for the analyst or consultant to make recommendations that are adequately applicable to the NYS specific situation.

A CAS will be based on a statement of work (SOW) which Gartner will create following a verbal or written agency project definition.

#### ***Pricing***

The cost of a Consultant Advisory Service will be based on a daily rate that will not exceed \$3,960 per consultant per day plus travel and expenses as incurred to the levels allowed by published NYS rates. The actual fee charged will be based on the level of expertise dictated by the agency project definition and the advisor providing the advice.

### 3.4 Gartner for Enterprise IT Leaders

Gartner for Enterprise IT Leaders (the "Service") is for senior IT leaders ("Members") in large, complex enterprises who are managing IT functions for a business unit or the entire enterprise. The Service is managed by a Gartner Leadership Partner and Client Manager who will tailor program deliverables to the unique needs of each Member. There are two levels of named User access to Enterprise for IT Leaders: Member and Enterprise IT Leaders Workgroup.

#### 3.4.1 Deliverables

##### **Member Servicing**

An **Assigned Enterprise IT Leaders Delivery Team** led by a Leadership Partner who maintains the Enterprise IT Leaders relationship through the delivery of program services and implementation of member service delivery plan. Team also includes a Client Manager who is assigned to the Member and enhances the Member's experience through facilitating inquiry and responding to specific requests for Gartner research and insight.

- **Annual On-site Meeting**—One (1) annual on-site meeting with the assigned Leadership Partner for coaching and advice. On-site visits focus on strategic planning and execution of key initiatives. The Leadership Partner provides leadership guidance based on the collective expertise of Gartner Research and the Member Peer Community.
- **Member Value Plan**—Customized service plan created in collaboration with the member at the beginning of the service and reviewed and revised periodically through the membership life cycle. Elements include member expectations, value criteria, top issues and action plan.
- **Leadership Partner Outreach Call**—Approximately six (6) times per year, the Leadership Partner will place a proactive outreach call to the Member for the purpose of contextualization of the Enterprise IT Leaders research topic or research report, and leadership and management issues.
- **Client Manager Outreach Call**—Approximately four (4) times per year, the Client Manager will place a proactive outreach call to the Member to check on the Member's status, review the member Value Plan as appropriate, and to develop resulting actions with the Member.
- **Facilitated Peer Networking**—"As needed" interactions among members, facilitated by a Service Delivery associate.

### **Peer Community Events and Content**

- **Member Forum Meetings**—These Members-only meetings, which are held two (2) times per year for one and one-half (1.5) days and are focused on member-selected topics, provide a venue for networking and peer exchange and feature Member presentations on working solutions and facilitated workshops with Gartner Analysts.
- **Member-driven Research**—Members receive case studies and findings, which address real working practices focused on the issues most critical to their roles, and which are illustrated with tools and templates provided by fellow Members and supported by Gartner Research.
- **Exclusive Member Portal**—This Members-only Web portal, accessed through gartner.com, provides access to exclusive Research, Member-contributed presentations, and tools.
- **Bi-monthly Webinars**—Bimonthly webinars provide opportunities to investigate Members' "top 10" priorities by exploring strategies and tactics employed by other Members, along with insight and context provided by Gartner Analysts. These webinars address issues outside of regularly scheduled peer meetings and are available to Members and members of their extended teams.
- **Designated Member Delegate**—A Member may identify a "Designated Delegate" from within the Client organization to receive select Enterprise IT Leaders privileges for the purpose of supporting the Member. The Designated Delegate may attend one (1) Member Forum and may access content on the Exclusive Member portal. (Note: Delegate will not have any access to Gartner for IT Leaders content unless they are currently a Gartner for IT Leaders Licensed User.)
- **Aligned Gartner Analyst**—Participates in, and acts as an advisor to Member Forum Meetings. Gartner reserves the right to change the Analyst scheduled for a Member Forum Meeting or supplement the Analyst with a Gartner Subject Matter Expert.

## **Gartner for IT Leaders Content**

- **Access to all Gartner for IT Leaders Role-Based Web Pages**—Access to exclusive gartner.com home pages that serve as gateways to role-specific content such as activity cycles, blogs, polling, top research picks, and most-viewed research.
  - **Toolkit Resources**—Prescriptive, downloadable and diagnostic resources, which provide actionable advice and guidance on how to execute specific actions, and which are organized by specific roles and activities. Downloadable tools and templates may be altered by Clients for their own internal non-commercial use only.
  - **Access to Gartner Core Research**—Research accessible through gartner.com, which covers a broad range of technology topics and provides a base of knowledge for all technology leaders.
  - **Access to Gartner Benchmarking Analytics IT Key Metrics Data**—Accessible through gartner.com, IT Key Metrics Data provides a comprehensive database of the industry's most definitive IT spending and staffing levels in addition to key technology cost and performance metrics.
  - **Summit Event Ticket**—Non-transferable Admission to one (1) Gartner Summit Conference. Third day “Best Practice, Methodology and Implementation Days” at EMEA Summits, as well as other special programs, Gartner Seminars, tutorials, and workshops are not included in the Summit Ticket deliverable and may require an additional fee.
    - **Note:** Named Licensed Users of Gartner for Enterprise IT Leaders receive all of the Gartner for IT Leaders Advisor deliverables listed above, as well as:
    -
1. **Gartner for IT Leaders Advisor Analyst Inquiry**—Provides Licensed Users with access to Gartner Analysts who are associated with the Service purchased by Client. Participation in Standard Analyst Inquiry is subject to the following terms:
- a. Licensed Users, who have Advisor-level Inquiry access, may engage with a Gartner Analyst: (i) to discuss a Gartner Research document published within the scope of their specific Service, and/or (ii) to apply a Gartner Research document to a related issue that their company is facing.
  - b. Participation in Analyst Inquiry is limited to the Licensed User(s) and the Gartner Analyst only (i.e., non-Users, either inside or outside of the Client company, may not attend or otherwise participate on the call).
  - c. Analyst Inquiry sessions may take up to 30 (thirty) minutes of an Analyst's time.
  - d. Analyst Inquiry sessions may also be used to request basic technology reviews of business-related documents that are 20 (twenty) pages or less and take up to 60 (sixty) minutes of an Analyst's time. Examples of these documents include requests for proposals, marketing or business plans and procurement agreements.

**Note:** Unless otherwise provided above: (i) you must be a Licensed User to access Gartner Research Services; (ii) passwords, Research documents and Analyst Inquiry may not be shared with Non-Users; and (iii) your use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

## 3.5 Gartner for Enterprise Supply Chain Leaders

Gartner for Enterprise Supply Chain Leaders (the “Service”) is for senior supply chain leaders (“Members”) in large, complex enterprises who are managing supply chain functions for a business unit or the entire enterprise. The Service is managed by a Gartner Leadership Partner and Client Manager who will tailor program deliverables to the unique needs of each Member. There are two levels of named User access to Enterprise for Supply Chain Leaders: Member and Enterprise Supply Chain Leaders Workgroup.

### 3.5.1 Deliverables

Each Member designated by the Client (“Licensed User”) receives the following Deliverables:

#### Member Servicing

An **Assigned Enterprise Supply Chain Leaders Delivery Team** led by a Leadership Partner who oversees and manages the delivery of program services and implementation of a member service delivery plan. Team also includes a Client Manager who is assigned to the Member to assist in facilitating inquiry and responding to specific requests for AMR research.

- **Annual On-site Meeting**—One (1) annual on-site meeting with the assigned Leadership Partner for coaching and advice. Focuses on strategic planning and execution of key initiatives. The Leadership Partner provides guidance based on the collective expertise of AMR Research and the Member Peer Community.
- **Member Value Plan**—Customized service plan created in collaboration with the Member and reviewed and revised periodically through the membership life cycle. Elements include Member expectations, value criteria, top issues and action plan.
- **Leadership Partner Outreach Call**—Approximately six (6) times per year, the Leadership Partner will call the Member to discuss the Enterprise Supply Chain Leaders research topic or report and relevant leadership and management issues.
- **Client Manager Outreach Call**—Approximately four (4) times per year, the Client Manager will call the Member to check on the Member’s status, review the Member Value Plan, and develop actions with the Member.
- **Facilitated Peer Networking**—“As needed” interactions among Members, facilitated by the Leadership Partner or Client Manager.

#### Peer Community Events and Content

- **Member Forum Meetings**—These Members-only meetings, which are held two (2) times per year for one and one-half (1.5) days and are focused on Member-selected topics, provide a venue for networking and peer exchange, and feature Member presentations on working solutions and facilitated workshops with Gartner Analysts.
- **Member-driven Research**—Members receive case studies and findings, which address real working practices that are focused on the issues most critical to their roles and illustrated with tools and templates provided by fellow Members and supported by Gartner Research.
- **Exclusive Member Portal**—This Members-only Web portal, accessed through gartner.com, provides access to exclusive Research, Member-contributed presentations, and tools.
- **Bimonthly Webinars**—Bimonthly webinars provide opportunities to investigate Members’ “top 10” priorities by exploring strategies and tactics employed by other

Members, along with insight and context provided by Gartner Analysts. These webinars address issues outside of regularly scheduled peer meetings and are available to Members and members of their extended teams.

- **Designated Member Delegate**—A Member may identify a “Designated Delegate” from within the Client organization to receive select Enterprise Supply Chain Leaders privileges for the purpose of supporting the Member. The Designated Delegate may attend one (1) Member Forum in lieu of the Member and may access content on the Exclusive Member Portal.
- **Aligned Gartner Analyst**—Participates in, and acts as an advisor to, Member Forum Meetings. Gartner reserves the right to change the Analyst scheduled for a Member Forum Meeting or supplement the Analyst with a Gartner Subject Matter Expert.
- **Web Access**—Access to AMR Research through exclusive Web portal covering a broad range of supply chain topics and providing a base of knowledge for supply chain and operations leaders.
- **A Range of Written Research Reports, including:**
  - **Supply Chain Best Practices**—Reports outlining best practices and lessons learned from peer companies that have demonstrated leadership in applying supply chain principles to drive business results.
  - **Special Reports**—Reports (i) covering underlying research themes that cut across technology or industry-specific research, or (ii) providing in-depth strategic analysis of trends, industry developments, vendors, products and services.
  - **Published Research**—Reports focusing on companies, products, markets, decision frameworks, tactical guidelines, case studies and strategic planning assumptions.
- **Analyst Inquiry**—Provides Licensed Users with access to Gartner Analysts who are associated with the Service purchased by Client.
- **Event Ticket**—One (1) ticket to either the AMR Supply Chain Executive Event or an AMR Exchange Event. Tickets are transferable within the Client organization, up to five (5) business days before the start of the Event.

**Note:** AMR is a wholly owned subsidiary of Gartner, Inc.

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**Table 3. Gartner for Enterprise IT Leaders: Pricing  
Gartner for Enterprise Supply Chain Leaders: Pricing**

Description	Single Member Price	Multi-Member Price
<b>Gartner for Enterprise IT Leaders:</b> <ul style="list-style-type: none"> <li>■ Infrastructure and Operations</li> <li>■ Sourcing &amp; Vendor Management</li> <li>■ Enterprise Architecture</li> <li>■ Applications—SAP</li> <li>■ Applications—Oracle</li> <li>■ Security and Risk Management</li> <li>■ HR Professionals</li> </ul>	\$53,930	\$44,850
<b>Gartner for Enterprise Supply Chain Leaders:</b> <ul style="list-style-type: none"> <li>■ Supply Chain Leaders</li> </ul>	\$53,930	\$44,850

**Notes:**

1. Enterprise IT Leaders and Enterprise Supply Chain Leaders contribute (“count”) toward multi user price levels on other Gartner Product offerings within the agency; services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
2. All other Gartner product offerings within the same agency, excluding add-on services, contribute (“count”) toward multi user/member pricing for Enterprise IT Leaders or Enterprise Supply Chain Leaders.
3. All EITL and ESCL memberships require an annual contract.
4. All EITL and ESCL memberships commence on the first day of the calendar month.
5. Pricing is for an annual membership.

### 3.6 Gartner for IT Leaders

Gartner for IT Leaders is a service that provides Licensed Users (“Users”) with access to research and advice about information technology and the functional responsibilities of specific IT roles and affords Users the option of inquiry with Gartner Analysts. Gartner for IT Leaders makes it easier for Registered Users (“Users”) to find the information they need to make informed decisions by connecting our resources to their every-day needs. There are four levels of named User access to Gartner for IT Leaders: Reference, Advisor, Premier and Advisor Workgroup.

Role-based Offerings: (+ = offerings available with a Premier service level option)

- Application Management
- Business Intelligence and Information Management
- Business Process Improvement
- Enterprise Architecture +
- IT Infrastructure and Operations
- Program and Portfolio Management
- Security and Risk Management +
- Sourcing and Vendor Relationships

### 3.6.1 Deliverables for Reference Users

- **Access to all Gartner for IT Leaders Role-Based Web pages**—Exclusive gartner.com home pages that serve as gateways to role-specific content, such as: activity cycles, blogs, polling, top research picks, and most-viewed research.
- **Community**—Access to an exclusive online community that provides insight and experience from both Gartner analysts and IT peers who share common interests related to specific roles.
- **News and Analysis**—Timely analysis of breaking news of interest to specific technology roles, which keeps IT leaders current.
- **Access to Gartner Core Research**—through gartner.com. Research across a broad range of technology topics that provides a base of knowledge for all technology leaders.
- **Access to Gartner Benchmarking Analytics IT Key Metrics Data**—Accessible through gartner.com, IT Key Metrics Data provides a comprehensive database of the industry's most definitive IT spending and staffing levels in addition to key technology cost and performance metrics.
- **A Range of Written Research Reports**—such as:
  - **Vendor and Product Ratings**—A report that provides client organizations with a holistic view of the vendors from which they are purchasing products and services.
  - **Special Reports**—Reports that (i.) may cover underlying research themes that cut across technology or industry-specific research, or (ii.) may provide in-depth strategic analysis of trends, industry developments, vendors, products and services.
  - **Published Research**—Reports that focus on companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
  - **Toolkit Resources**—Prescriptive, downloadable and diagnostic resources that provide actionable advice and guidance on how to execute specific actions organized by specific roles and activities. Downloadable tools and templates may be altered by Clients for their own internal non-commercial use only.

**Note:** You must be an authorized Licensed User to access Gartner Research Services or Analyst Inquiry. Passwords, Research documents and Analyst Inquiry may not be shared with non-Licensed Users. Gartner monitors client usage patterns. Unusual or excessive usage patterns may be audited in accordance with the Usage terms herein. Services are to be used for each Licensed User's individual business purposes for the benefit of the Licensed User. Gartner periodically updates Service names and deliverables to reflect client needs and market relevancy.

### 3.6.2 Deliverables for Advisor Users

Gartner for IT Leaders Licensed Advisor Users ("Users") shall receive all the Gartner for IT Leaders deliverables for Licensed Reference Users, stated above, as well as:

- **Gartner for IT Leaders Advisor Analyst Inquiry**—Provides Licensed Users with access to Gartner Analysts who are associated with the Service purchased by the Client. Participation in the Standard Analyst Inquiry Program is subject to the following terms:
  - Licensed Users who have Advisor-level Inquiry access, or who are otherwise entitled to request Analyst Inquiry Sessions, such as through the Add-on Inquiry program (Open Market), may engage with a Gartner Analyst: (i) to discuss a Gartner Research document published within the scope of their specific Service,

and/or (ii) to apply a Gartner Research document to a related issue that their organization is facing.

- Participation in Analyst Inquiry is limited to the Licensed User(s) and the Gartner Analyst only (i.e., non- Users, either inside or outside of the Client organization, may not attend or otherwise participate on the call).
- Analyst Inquiry sessions may take up to 30 (thirty) minutes of an Analyst's time.
- Analyst Inquiry sessions may also be used to request basic technology reviews of business-related documents that are 20 (twenty) pages or less and take up to 60 (sixty) minutes of an Analyst's time. Examples of these documents include requests for proposals, marketing or business plans and procurement agreements.

Inquiries requiring additional analysis or research by the Analyst are not included. Questions that require additional primary or secondary research, extensive modeling of published data, or development of data that is not published are not included as Inquiry in this Service

- **Use of Research**—A Licensed User may, on an occasional and infrequent basis, forward copies of individual research documents, not to exceed 10 (ten) separate documents per Licensed User per contract year, to specific individuals within the Client organization for the purpose of facilitating executive decision making. Client understands that the forwarding of documents under this provision may not be done on a routine basis, or by means of posting on Client's corporate intranet, or in a manner that has the intent or effect of avoiding the purchase of additional User licenses from Gartner.
- **Webinars**—Periodic Web conferences where Gartner Analysts speak on timely topics in information technology and then solicit questions from listeners.
- **Talking Technology Series**—Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on gartner.com or downloaded to listen to in an MP3 format.
- **Summit Event Ticket**—Admission to one (1) Gartner Summit Conference. Please note that third day "Best Practice, Methodology and Implementation Days" at EMEA Summits, as well as other special programs, Gartner Seminars, tutorials and workshops *are not* included in the Summit Ticket deliverable and may require an additional fee. Tickets are transferable within the Client organization.

**Note:** You must be an authorized Licensed User to access Gartner Research or Analyst Inquiry. Passwords, Research documents and Analyst Inquiry may not be shared with non-Licensed Users. Gartner monitors client usage patterns. Unusual or excessive usage patterns may be audited in accordance with the Usage terms herein. Services are to be used for each Licensed User's individual business purposes for the benefit of the Licensed User. Gartner periodically updates Service names and deliverables to reflect client needs and market relevancy.

### 3.6.3 Deliverables for Premier Users

Gartner for IT Leaders Premier is a premium service available to named Registered Users ("Users") of selected Gartner for IT Leaders role-based offerings. This service provides a deeper level of engagement with Gartner Analysts by enabling Users to work directly and consistently with a designated Gartner Analyst.

All Registered Users of Gartner for IT Leaders Premier (“Users”) will have access to all the Gartner for IT Leaders deliverables for Licensed Advisor Users, stated above, as well as the following deliverables:

- **Assigned Analyst**—A designated Analyst (“Analyst”) is assigned to the Client to partner with the Client and build an ongoing relationship through planned outreach calls and client on-site sessions. The Analyst will focus on topics specific to the selected role.
- **Designated Customer Service Representative**—A designated customer service representative (“Customer Service Rep”) is assigned to the Client to provide a single point of contact with the Client. The Customer Service Rep provides proactive outreach to each Premier User to schedule annual/biannual visits and outreach calls.
- **Outreach Calls**—Six (6) one-hour telephone sessions with the Analyst to review and update strategic priorities and discuss progress. Outreach calls must be with Client’s assigned Analyst only. Access to other Gartner Analysts is available through the Client’s Standard Analyst Inquiry privileges.
- **Planning Sessions**—Two (2) on-site planning sessions with the Analyst. The Analyst will conduct a half-day (four-hour maximum) planning session on topics specific to the Premier User’s role at a mutually agreed upon site. The Planning sessions are limited to discussion with the Analyst. The Analyst will focus on topics specific to the selected role.

**Notes:**

**Scheduling Planning Sessions**

1. Specific dates and details of the planning sessions will be worked out between the Client and their Customer Service Representative(s) at the time each Planning Session is scheduled.
2. Gartner will send Client a confirmation e-mail and accompanying scope of work prior to each Planning Session. Gartner cannot guarantee that the assigned Analyst or specific Analyst or date will be available.
3. Client should make scheduling preferences known to Gartner at least eight weeks in advance of Client’s preferred presentation days to improve the likelihood of the designated Analyst’s participation. Gartner reserves the right to substitute another qualified Analyst if the assigned Analyst is not available. If for any reason the scheduled Analyst becomes unavailable, Gartner will either provide another qualified Analyst or work with Client to reschedule the Planning Session.
4. If for any reason Client reschedules or cancels the Planning Session, a \$2,000 fee will be assessed.

**Designated Analyst**

Gartner reserves the right to change the assignment of the designated Analyst at anytime during the contract year. Gartner will use its reasonable efforts to accommodate any request by the named Premier User to change their assigned designated Analyst.

**Use of Planning Sessions**

All planning sessions must be completed within the annual membership term. Un-used planning sessions are not refundable.

**Note:** You must be an authorized Licensed User to access Gartner Research Services or Analyst Inquiry. Passwords, Research documents and Analyst Inquiry may not be shared with non-Licensed users. Gartner monitors client usage patterns. Unusual or excessive usage patterns may be audited in accordance with the Usage terms herein. Services are to be used for each Licensed User’s individual business purposes for the benefit of the Licensed User. Gartner periodically updates Service names and deliverables to reflect client needs and market relevancy. Client’s use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

## 3.7 Gartner for Supply Chain Leaders

Gartner for Supply Chain Leaders is a service that provides Licensed Users (“Users”) with access to research and advice to assist them in aligning business strategies with process and technology initiatives and to provide them with ongoing decision support and affords Users the option of inquiry with Gartner Analysts. Gartner for Supply Chain Leaders makes it easier for Registered Users (“Users”) to find the information they need to make informed decisions by connecting our resources to their every-day needs. There are three levels of named User access to Gartner for Supply Chain Leaders: Reference, Advisor, and Advisor Workgroup.

### 3.7.1 Deliverables

#### *Reference Users*

Client’s designated users (“Licensed Users”) will have access to the following deliverables:

- **Web Access**—Exclusive home page that serves as a gateway to published content.
- **Access to AMR Research**—Research accessible via Web portal covering a broad range of supply chain topics and providing a base of knowledge for supply chain and operations leaders.
- **A Range of Written Research Reports**, including:
  - **Supply Chain Best Practices**—Reports outlining best practices and lessons learned from peer companies that have demonstrated leadership in applying supply chain principles to drive business results.
  - **Special Reports**—Reports (i) covering underlying research themes that cut across technology or industry-specific research, or (ii) providing in-depth strategic analysis of trends, industry developments, vendors, products and services.
  - **Published Research**—Reports focusing on companies, products, markets, decision frameworks, tactical guidelines, case studies and strategic planning assumptions.
  - **Webinars**—Periodic online Web conferences where Gartner analysts speak on timely topics and then solicit questions from listeners.

**Notes:** Unless otherwise provided above, use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

### 3.7.2 Deliverables for Advisor Users

Client’s designated users (“Licensed Users”) will have access to the following deliverables:

- **Web Access**—Exclusive home page that serves as a gateway to published content.
- **Access to AMR Research**—Research accessible via Web portal covering a broad range of supply chain topics and providing a base of knowledge for supply chain and operations leaders.
- **A Range of Written Research Reports**, including:
  - **Supply Chain Best Practices**—Reports outlining best practices and lessons learned from peer companies that have demonstrated leadership in applying supply chain principles to drive business results.

- **Special Reports**—Reports (i) covering underlying research themes that cut across technology or industry-specific research, or (ii) providing in-depth strategic analysis of trends, industry developments, vendors, products and services.
- **Published Research**—Reports focusing on companies, products, markets, decision frameworks, tactical guidelines, case studies and strategic planning assumptions.
- **Webinars**—Periodic online Web conferences where Gartner analysts speak on timely topics and then solicit questions from listeners.
- **Analyst Inquiry**—Provides Licensed Users with access to Gartner Analysts who are associated with the Service purchased by Client.
- **Event Ticket**—One (1) ticket to either the AMR Supply Chain Executive Event or an AMR Exchange event. Tickets are transferable within the Client organization, up to five (5) business days before the start of the Event.

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**Table 4. Gartner for IT Leaders: Pricing  
Gartner for Supply Chain Leaders: Pricing**

# of Users	Reference	Advisor	Gartner for IT Leaders Premier*
Single User (per User)	\$20,420	\$30,330	\$52,400*
Multi User (per User)	\$13,010	\$22,910	\$46,180*
Product Code	REFROLE	ADVROLE	PREMROLE

**Notes:**

1. **\*Renewal Only:** effective March 1, 2010, IT Leaders—Premier is no longer available for new orders. Renewals of existing Premier memberships will be available through February 28, 2011.
2. IT Leaders contributes (“counts”) toward multi user price levels on other Gartner Product offerings within the same agency and services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
3. All other Gartner product offerings within the same agency, excluding add-on services, contribute (“count”) toward multi user/member pricing for IT Leaders.
4. All Gartner for IT Leaders Memberships require an annual contract.
5. All Gartner for IT Leaders Memberships commence on the first day of the calendar month.
6. Pricing is for Annual Membership.

**Gartner for Enterprise Supply Chain Leaders Workgroup Users**

Gartner for Enterprise Supply Chain Leaders Workgroup (the “Service”) is an expanded version of the standard Gartner for Enterprise IT Leaders offering that is expressly designed to enable Clients to access Gartner resources in a workgroup environment.

The Service is intended for use by Gartner for Enterprise Supply Chain Leaders Members (the “Workgroup Leader”) and their direct reports or cross-functional teams (the “Workgroup Members”), as listed on the attached Workgroup Member Form. Collectively, the Gartner for Enterprise Supply Chain Leaders Member and his/her Workgroup Members are referred to herein as “Licensed Users.”

The Service enables the Workgroup Leader to collaborate with their Workgroup Members by providing them with access to Gartner Research and also by permitting them to participate in Analyst Inquiry scheduled by the Workgroup Leader.

### ***Deliverables***

- **Gartner for Enterprise Supply Chain Leaders Member Deliverables**—As set forth in the Gartner for Enterprise Supply Chain Leaders Service Description.
- **Workgroup Member Deliverables**
  - All the deliverables in the **Enterprise Supply Chain Leaders Service Description**, with the exception of “Member Servicing,” “Peer Community Events and Content,” and “Summit Event Ticket.”
  - **Document Allocation**—During the contract term, each Workgroup Member may open in read-only HTML format (i) Gartner Research documents found in home page components called “AMR Picks” and “News Analysis”; and (ii) up to 20 (twenty) additional Gartner Research documents of his/her choosing. Each Workgroup Member is entitled to a set of five (5) document selection reversals that is refreshed each calendar quarter.
  - **Counter**—A tool to help each Workgroup Member keep track of the number of documents opened, reversed, and remaining to be opened.
  - **Inquiry Participation**—Each Workgroup Member may participate in Analyst Inquiry provided that the Workgroup Leader schedules and facilitates the Inquiry session.

**Note:** The Gartner for Enterprise Supply Chain Leaders Workgroup Leader (not the Workgroup Members) may, on an occasional and infrequent basis, forward copies of individual research documents, not to exceed ten (10) separate documents per Licensed User per contract year, to specific individuals within the Client organization for the purpose of facilitating executive decision-making. Client understands that the forwarding of documents as part of this Service may not be done on a routine basis, or by means of posting on Client’s corporate intranet, or in a manner that has the intent or effect of avoiding the purchase of additional User licenses from Gartner.

Unless otherwise provided above, use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of [gartner.com](http://gartner.com)

### **Gartner for Supply Chain Leaders Advisor Workgroup Users**

Gartner for Supply Chain Leaders Advisor Workgroup (the “Service”) is an expanded version of the standard Gartner for Supply Chain Leaders Advisor offering that is expressly designed to enable clients to access Gartner resources in a workgroup environment.

This Service is intended for the Supply Chain Leaders Workgroup Advisor (“Workgroup Advisor”) and his/her direct reports or cross-functional teams (“Workgroup Members”) as listed on the attached Service Agreement. Collectively, the Workgroup Advisor and Workgroup Members are “Licensed Users.”

### ***Deliverables***

#### **(1) The Workgroup Advisor is entitled to the following Deliverables:**

- **Access to all Supply Chain Leaders Specialty Web Pages**—Gartner.com home pages that serve as gateways to industry group and role-related content such as activity cycles, blogs, polling, top research picks, and most-viewed research.

- **Access to Gartner's Supply Chain Research**—Research accessible through gartner.com covering a broad range of supply chain topics and providing a base of knowledge for supply chain and operations leaders.
- **A Range of Written Research Reports**, including:
  - **Supply Chain Best Practices**—Reports outlining best practices and lessons learned from peer companies that have demonstrated leadership in applying supply chain principles to drive business results.
  - **Special Reports**—Reports (i) covering underlying research themes that cut across technology or industry-specific research, or (ii) providing in-depth strategic analysis of trends, industry developments, vendors, products, and services.
  - **Published Research**—Reports focusing on companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
  - **Vendor and Product Ratings**—A report that provides client organizations with a holistic view of the vendors from which they are purchasing products and services.
  - **Toolkit Resources**—Prescriptive, downloadable and diagnostic resources that provide actionable advice and guidance on how to execute specific actions organized by specific roles and activities. Downloadable tools and templates may be altered by Clients for their own internal non-commercial use only.
- **Community**—Access to an exclusive online community that provides insight and experience from both Gartner Analysts and supply chain peers who share common interests related to specific roles.
- **Tools for Workgroup Collaboration**—Enables sharing of Workgroup Member-generated document tags with Workgroup Members and vice versa.
- **Peer Connect**—Enables supply chain professionals to access and leverage the collective experience of their peers via a secure online network.
- **Workgroup Usage Reports**—Provides Usage Reports for each Workgroup Member.
- **Webinars**—Provide periodic online Web conferences for Gartner Analysts to speak on timely topics and solicit questions from listeners.
- **Analyst Inquiry**—Provides access to Gartner Analysts associated with the Service purchased by Client.
- **Event Ticket**—Valid for one (1) admission to either the AMR Supply Chain Conference or an AMR Exchange Event, provided such Event takes place during the 12-month (twelve-month) term for which the Ticket has been issued. While Tickets are non-transferable outside the client organization, Attendee may send a substitute up to five (5) business days before the Event provided that the substitute is another client organization employee.

**(2) Workgroup Members are entitled to the following Deliverables:**

- **All the Advisor Deliverables set forth above, except for “Workgroup Usage Reports” and “Event Ticket.”**
- **Document Allocation**—Entitles each Workgroup Member to open online (i) Gartner “AMR Picks” and “News Analysis” Research documents; and (ii) up to 20 (twenty) additional Gartner Research documents of Workgroup Member’s choosing.
- **Reversals**—Allows Workgroup Members to reverse the debit(s) of specific document(s) up to five (5) times per calendar quarter.
- **Counter**—Helps Workgroup Members keep track of number of documents opened and number that remain to be opened.
- **Inquiry Participation**—Entitles Workgroup Members to participate in Analyst Inquiry provided that their Workgroup Advisor schedules and facilitates the Inquiry session.

**Note:** The Workgroup Advisor (not the Members) may, on an occasional and infrequent basis, forward copies of individual Research Documents, not to exceed 10 (ten) separate documents per Licensed User per contract year, to specific individuals within the Client organization for the purpose of facilitating executive decision making. Client understands that this forwarding of documents may not be done on a routine basis or by means of posting on Client’s corporate intranet or in a manner that has the intent or effect of avoiding the purchase of additional User licenses.

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## **3.8 Gartner IT Leaders Workgroups**

Gartner Leaders Workgroups (the “Service”) is an expanded version of the standard Gartner for Enterprise IT Leaders and Gartner for IT Leaders offering that is expressly designed to enable Clients to access Gartner resources in a workgroup environment.

The Service enables the IT Leaders Member or Advisor to collaborate with their Workgroup Members by providing them with access to Gartner Research related to information technology and the functional responsibilities of specific IT roles, and also by permitting them to participate in Analyst Inquiry scheduled by the Gartner for IT Leaders Workgroup Advisor.

### **3.8.1 Gartner for Enterprise IT Leaders Workgroup Users**

Gartner for Enterprise IT Leaders Workgroup (the “Service”) is an expanded version of the standard Gartner for Enterprise IT Leaders offering that is expressly designed to enable Clients to access Gartner resources in a workgroup environment.

The Service is intended for use by Gartner for Enterprise IT Leaders Members and their direct reports or cross-functional teams (the “Workgroup Members”), as listed on the attached Workgroup Member Form. Collectively, the Gartner for Enterprise IT Leaders Member and his/her Workgroup Members are referred to herein as “Licensed Users.”

The Service enables the Gartner for Enterprise IT Leaders Members to collaborate with their Workgroup Members by providing them with access to Gartner Research related to information technology and the functional responsibilities of specific IT roles, and also by permitting them to participate in Analyst Inquiry scheduled by the Gartner for IT Leaders Workgroup Advisor.

## **Deliverables**

- **Gartner for Enterprise IT Leaders Member Deliverables**—As set forth in the Gartner for Enterprise IT Leaders Service Description.
- **Workgroup Member Deliverables**—
  - All of the **Gartner for Enterprise IT Leaders** deliverables, with the exception of “Member Servicing,” “Peer Group Meetings and Content,” “Workgroup Usage Reports” and “Summit Event Ticket.”
  - **Document Allocation**—During the contract term, each Workgroup Member may open in read-only HTML format (i) Gartner Research documents found in home page components called “Weekly Picks” and “News Analysis”; and (ii) up to 20 (twenty) additional Gartner Research documents of his/her choosing. Each Workgroup Member is entitled to a set of five (5) document selection reversals that is refreshed each calendar quarter.
  - **Counter**—A tool to help each Workgroup Member keep track of number of documents opened, reversed, and remaining to be opened.
  - **Inquiry Participation**—Each Workgroup Member may participate in Analyst Inquiry provided that their Gartner for Enterprise IT Leaders Workgroup Advisor schedules and facilitates the Inquiry session.

**Note:** The Gartner for IT Enterprise Leaders Member (not the Workgroup Members) may, on an occasional and infrequent basis, forward copies of individual research documents, not to exceed ten (10) separate documents per Licensed User per contract year, to specific individuals within the Client organization for the purpose of facilitating executive decision-making. Client understands that the forwarding of documents as part of this Service may not be done on a routine basis, or by means of posting on Client’s corporate intranet, or in a manner that has the intent or effect of avoiding the purchase of additional User licenses from Gartner.

Unless otherwise provided above: (i) you must be a Licensed User to access Gartner Research Services; (ii) passwords, Research documents and Analyst Inquiry may not be shared with Non-Users; and (iii) your use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of [gartner.com](http://gartner.com).

### **3.8.2 Gartner for IT Leaders Advisor Workgroup Users**

Gartner for IT Leaders Advisor Workgroup (the “Service”) is an expanded version of the standard Gartner for IT Leaders Advisor offering that is expressly designed to enable clients to access Gartner resources in a workgroup environment.

The Service is intended for use by Gartner for IT Leaders Workgroup Advisors and their direct reports or cross-functional teams (the “Workgroup Members”), as set forth in the Client Purchase Order. Collectively, the Gartner for IT Leaders Workgroup Advisor and his/her Workgroup Members are “Licensed Users.”

The Service enables the Gartner for IT Leaders Workgroup Advisor to collaborate with his/her Workgroup Members by providing them with access to Gartner Research related to information technology and the functional responsibilities of specific IT roles, and also by permitting them to participate in Analyst Inquiry scheduled by the Gartner for IT Leaders Workgroup Advisor.

## ***Deliverables***

The Workgroup Advisor will have access to the following deliverables:

- **Gartner for IT Leaders Role-based Web Pages**—Includes exclusive gartner.com home pages that serve as gateways to role-specific content such as activity cycles, blogs, polling, top research picks, and most-viewed research.
- **Gartner Core Research**—Research accessible through gartner.com, which covers a broad range of technology topics and provides a base of knowledge for all technology leaders.
- **Gartner IT Key Metrics Data**—Provides a comprehensive database on industry, IT spending and staffing levels in addition to key technology cost and performance metrics.
- **News and Analysis**—Timely analysis of news of interest to specific technology roles.
- **A Range of Written Research Reports**—Includes vendor and product ratings, special reports, and downloadable tools and templates, which may be altered by Clients for their own internal non-commercial use only.
- **Tools for Workgroup Collaboration**—Enables sharing of Workgroup Member-generated document tags with Workgroup Members and vice versa.
- **Workgroup Usage Reports**—Provides summary usage reports for each Workgroup Member, including Member name, number of documents opened, remaining to be opened, and reversed, i.e., when a document is opened but does not meet the information need.
- **Peer Connect**—A secure online network of IT professionals who can access and leverage the collective experience of their peers.
- **IT Leader Workgroup Advisor Analyst Inquiry**—Provides access to Gartner Analysts who are associated with the Service purchased by Client. Workgroup Members may participate in Analyst Inquiry so long as their IT Leader Workgroup Advisor schedules and facilitates the Inquiry. Participation in Standard Analyst Inquiry is subject to the following terms:
  - Licensed Users may engage with a Gartner Analyst: (i) to discuss a Gartner Research document published within the scope of their specific Service, and/or (ii) to apply a Gartner Research document to a related issue that their company is facing.
  - Participation in Analyst Inquiry is limited to the Licensed User(s) and the Gartner Analyst only (i.e., non-Users, either inside or outside of the Client company, may not attend or otherwise participate on the call).
  - Analyst Inquiry sessions may take up to 30 (thirty) minutes of an Analyst's time.
  - Analyst Inquiry sessions may also be used to request basic technology reviews of business-related documents that are 20 (twenty) pages or less and take up to 60 (sixty) minutes of an Analyst's time.
- **Webinars**—Periodic Web conferences where Gartner Analysts speak on timely topics in information technology and then solicit questions from listeners.
- **Talking Technology Series**—Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on gartner.com or downloaded to listen to in an MP3 format.

- **Talking Technology Series**—Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on gartner.com or downloaded to listen to in an MP3 format.
- **Summit Event Ticket**—Admission to one (1) Gartner Summit Conference. Third day “Best Practice, Methodology and Implementation Days” at EMEA Summits, as well as other special programs, Gartner Seminars, tutorials and workshops are not included in the Summit Ticket deliverable and may require an additional fee. Tickets are transferable within the Client organization

**Deliverables**

The Workgroup Members will have access to the following deliverables:

- **IT Leader Workgroup Advisor Deliverables**—as set forth above, except for “Workgroup Usage Reports” and “Summit Event Ticket.”
- **Document Allocation**—During the contract term, each Workgroup Member may open online (i) “Weekly Picks” and “News Analysis” Gartner Research documents; and (ii.) up to 20 (twenty) additional Gartner Research documents of his/her choosing.
- **Reversals**—Allows Workgroup Members to reverse the debit(s) of specific document(s) up to five (5) times per calendar quarter.
- **Counter**—Helps Workgroup Members keep track of number of documents opened, and number that remain to be opened.
- **Inquiry Participation**—Workgroup Members may participate in Analyst Inquiry provided that their IT Leader Workgroup Advisor schedules and facilitates the Inquiry session.

**Note:** The Gartner for IT Leaders Workgroup Advisor (*not the Members*) may, on an occasional and infrequent basis, forward copies of individual research documents, not to exceed ten (10) separate documents per Licensed User per contract year, to specific individuals within the Client organization for the purpose of facilitating executive decision-making. Client understands that the forwarding of documents as part of this Service may not be done on a routine basis, nor by means of posting on Client’s intranet, or in a manner that has the intent or effect of avoiding the purchase of additional User licenses from Gartner.

Unless otherwise provided above: (i) you must be a Licensed User to access Gartner Research Services; (ii) passwords, Research documents and Analyst Inquiry may not be shared with Non-Users; and (iii) your use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

**Table 5. Gartner for Enterprise IT Leaders Workgroup: Pricing (For Renewal Only)  
Gartner for Enterprise Supply Chain Leaders Workgroup: Pricing**

# of Users	Quantity	Price
1 Member and 3 Workgroup Members	1 + 3	\$60,840
1 Member and 4 Workgroup Members	1 + 4	\$66,180
1 Member and 5 Workgroup Members	1 + 5	\$71,510
1 Member and 6 Workgroup Members	1 + 6	\$76,850
1 Member and 7 Workgroup Members	1 + 7	\$82,180
1 Member and 8 Workgroup Members	1 + 8	\$87,520
1 Member and 9 Workgroup Members	1 + 9	\$92,850
1 Member and 10 Workgroup Members	1 + 10	\$98,200

**Table 6. Gartner for IT Leaders—Advisor Workgroup: Pricing (For Renewal Only)  
Gartner for Supply Chain Leaders—Advisor Workgroup: Pricing**

# of Users	Quantity	Price
1 Advisor and 3 Workgroup Members	1 + 3	\$39,840
1 Advisor and 4 Workgroup Members	1 + 4	\$45,180
1 Advisor and 5 Workgroup Members	1 + 5	\$50,520
1 Advisor and 6 Workgroup Members	1 + 6	\$55,860
1 Advisor and 7 Workgroup Members	1 + 7	\$61,190
1 Advisor and 8 Workgroup Members	1 + 8	\$66,530
1 Advisor and 9 Workgroup Members	1 + 9	\$71,850
1 Advisor and 10 Workgroup Members	1 + 10	\$77,190

**Notes:**

1. Workgroup Membership contributes (“counts”) toward multi user price levels on other Gartner Product offerings within the same agency and services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
2. All other Gartner product offerings within the same agency, excluding add-on services, contribute (“count”) toward multi user/member pricing for Workgroup Membership.
3. All Workgroup Memberships commence on the first day of the calendar month.
4. Pricing is for Annual Membership.
5. Additional Workgroup Members may be added, coterminous with the existing contract end date. Price of the additional member will not be pro-rated if the remaining term is less than 12 months.

**3.8.3 Gartner for Enterprise IT Leaders Workgroup Portfolio**

Gartner for Enterprise IT Leaders (EITL) is a membership-based service for CIO direct reports that combines expert coaching with pragmatic Gartner research and the real-world experiences of peers. Tailored exclusively to professionals in IT leader roles, EITL is based on Members' or "Leaders" individual value plans tied to their key initiatives.

With Enterprise IT Leaders Workgroup Portfolio, Leaders now have the opportunity to share their Gartner relationship with their working teams, composed of "Workgroup Members."

Gartner for Enterprise IT Leaders Workgroups (EITL Workgroups) is a complement to the base EITL offering in three distinct ways:

- **Workgroup Essentials** — Enables Workgroup Members to select and share research documents with other Members within a shared allocation of documents (20 documents per member).
- **Workgroup Role** — Provides Workgroup Members with unlimited access to one of eight predefined Role research libraries. Each Role library features Gartner for IT Leaders research coverage for the 11 key IT initiatives most common among IT Leaders in the given Role.
- **Workgroup Cross Function** — Provides Workgroup Members with unlimited access to Gartner for IT Leaders research published across all eight Roles.

Workgroup Members can participate in analyst inquiries scheduled by the Leader and also have access to Toolkits and Diagnostic Tools to aid in supporting their Leader's key initiatives.

### ***Product Snapshot***

#### Product(s) Offered

- Gartner for Enterprise IT Leaders Workgroup Essentials Leader
- Gartner for Enterprise IT Leaders Workgroup Essentials Member
- Gartner for Enterprise IT Leaders Workgroup Role Leader
- Gartner for Enterprise IT Leaders Workgroup Role Member
- Gartner for Enterprise IT Leaders Workgroup Role Member: Role Add-on
- Gartner for Enterprise IT Leaders Workgroup Cross Function Leader
- Gartner for Enterprise IT Leaders Workgroup Cross Function Member
- Industry Advisory Services available as an add-on

### ***Target Audience***

- Business leader with influence over IT decisions
- Associate in the IT organization who reports to a senior member
- Senior member of the IT organization with budget and decision-making authority

Gartner for Enterprise IT Leaders Workgroup is targeted at team members supporting the direct reports to the CIO.

The CIO's direct reports are targeted for Gartner for Enterprise IT Leaders "Leader" licenses.

The direct report's team members are targeted as "Workgroup Members" each having access to all Deliverables as set forth in the Workgroup Member Add-on.

### ***Workgroup Essential***

#### **Details**

#### Metered Access to Entire GITL Research

- Shared pool of member-selected documents
- Total of document pool equals the number of members x 20
- Library continues to grow year-over-year if renewed
- Accessible through Team Library
- Documents once opened can be shared with all members of the Workgroup team
- Up to 20 reversals per member per year
- Access to all Gartner for IT Leaders research
- 

### **Positioning**

- For a team with essential need for Gartner insight
- For clients who value self selection and sharing as a trade-off for library size
- Lower initial investment per head

- Access to Gartner for a larger number of individuals

### ***Workgroup Role***

#### **Details**

- Unmetered Access to Predefined Role/Key Initiatives Library
- Unmetered access to a predefined research library
- Within a role library clients have unlimited access to hundreds of documents without any counters or restrictions
- IAS members have access to their entire industry research
- Based on 10 role-specific Key Initiatives
- All role libraries are similar in size (# Key Initiatives and documents)
- KIs selected based on: Business Wizard registrations, Research leadership recommendations, upcoming research
- Initiatives list is regularly evaluated and updated
- Role is aligned to each individual member
- Multiple roles are common among a team

#### **Positioning**

- Gartner insight for a team
- For members who want regular and frequent access
- Where each individual team member needs access to their own role library and related Key Initiatives
- An optimal solution for members in focused functions (single roles)
- For clients who value the simplicity of a pre-selected “best content” library

### ***Workgroup Cross Function***

#### **Details**

##### Unmetered Access to the Entire GITL Research

- Analyst Access for all team members
- Unmetered access to all Gartner for IT Leaders research
- Both the Advisor and Workgroup members can access all research published across the 8 IT Leaders roles
- IAS members have access to their entire industry research
- Provides cross-functional teams with direct access to Gartner research without any counters or restrictions

#### **Positioning**

- Regular and frequent access to Gartner insight for a team
- For clients who need Analyst Access for all team members
- Solution for members working on projects in multiple roles

**Table 7. Gartner for Enterprise IT Leaders Workgroup Cross Function: Pricing**

# of Users	Quantity	Price
1 Member and 3 Workgroup Members	1 + 3	\$83,220
1 Member and 4 Workgroup Members	1 + 4	\$96,450
1 Member and 5 Workgroup Members	1 + 5	\$109,680
1 Member and 6 Workgroup Members	1 + 6	\$122,910
1 Member and 7 Workgroup Members	1 + 7	\$136,140
1 Member and 8 Workgroup Members	1 + 8	\$149,370
1 Member and 9 Workgroup Members	1 + 9	\$162,590
1 Member and 10 Workgroup Members	1 + 10	\$175,820

**Table 8. Gartner for Enterprise IT Leaders Workgroup Role: Pricing**

# of Users	Quantity	Price
1 Member and 3 Workgroup Members	1 + 3	\$61,170
1 Member and 4 Workgroup Members	1 + 4	\$76,380
1 Member and 5 Workgroup Members	1 + 5	\$84,590
1 Member and 6 Workgroup Members	1 + 6	\$92,800
1 Member and 7 Workgroup Members	1 + 7	\$101,020
1 Member and 8 Workgroup Members	1 + 8	\$109,230
1 Member and 9 Workgroup Members	1 + 9	\$117,440
1 Member and 10 Workgroup Members	1 + 10	\$125,650

**Table 9. Gartner for Enterprise IT Leaders Workgroup Essentials: Pricing**

# of Users	Quantity	Price
1 Member and 3 Workgroup Members	1 + 3	\$63,340
1 Member and 4 Workgroup Members	1 + 4	\$69,930
1 Member and 5 Workgroup Members	1 + 5	\$76,530
1 Member and 6 Workgroup Members	1 + 6	\$83,130
1 Member and 7 Workgroup Members	1 + 7	\$89,730
1 Member and 8 Workgroup Members	1 + 8	\$96,380
1 Member and 9 Workgroup Members	1 + 9	\$102,930
1 Member and 10 Workgroup Members	1 + 10	\$109,530

**Table 10. Gartner for IT Leaders Advisor Workgroup Cross Function: Pricing**

# of Users	Quantity	Price
1 Advisor and 3 Workgroup Members	1 + 3	\$61,920
1 Advisor and 4 Workgroup Members	1 + 4	\$75,150
1 Advisor and 5 Workgroup Members	1 + 5	\$88,380
1 Advisor and 6 Workgroup Members	1 + 6	\$101,610
1 Advisor and 7 Workgroup Members	1 + 7	\$114,840
1 Advisor and 8 Workgroup Members	1 + 8	\$128,070
1 Advisor and 9 Workgroup Members	1 + 9	\$141,290
1 Advisor and 10 Workgroup Members	1 + 10	\$154,520

**Table 11. Gartner for IT Leaders Advisor Workgroup Role: Pricing**

# of Users	Quantity	Price
1 Advisor and 3 Workgroup Members	1 + 3	\$46,870
1 Advisor and 4 Workgroup Members	1 + 4	\$55,080
1 Advisor and 5 Workgroup Members	1 + 5	\$63,290
1 Advisor and 6 Workgroup Members	1 + 6	\$71,500
1 Advisor and 7 Workgroup Members	1 + 7	\$79,720
1 Advisor and 8 Workgroup Members	1 + 8	\$87,930
1 Advisor and 9 Workgroup Members	1 + 9	\$96,140
1 Advisor and 10 Workgroup Members	1 + 10	\$104,350

**Table12. Gartner for IT Leaders Advisor Workgroup Essentials: Pricing**

# of Users	Quantity	Price
1 Advisor and 3 Workgroup Members	1 + 3	\$42,030
1 Advisor and 4 Workgroup Members	1 + 4	\$48,630
1 Advisor and 5 Workgroup Members	1 + 5	\$55,230
1 Advisor and 6 Workgroup Members	1 + 6	\$61,830
1 Advisor and 7 Workgroup Members	1 + 7	\$68,430
1 Advisor and 8 Workgroup Members	1 + 8	\$75,030
1 Advisor and 9 Workgroup Members	1 + 9	\$81,630
1 Advisor and 10 Workgroup Members	1 + 10	\$88,230

## 4.0 Gartner Executive Programs

Gartner Executive Programs is an exclusive organization of 3,700 CIOs and IT leaders worldwide. Participants benefit from the convenience of a single source of knowledge and insight focused on CIO-level challenges, dedicated service delivery, the shared knowledge of the world’s largest community of CIOs and the assurance of Gartner objectivity and insight.

Through service delivery in CIOs' context, unique insight into the CIO role and an unparalleled network of CIOs, programs such as Gartner for IT Executives equip participants with the tools and knowledge they need to deliver exceptional results for their organizations and develop themselves as leaders.

Gartner Executive Programs offer all of this and more. That's why more than 3,700 CIOs at the world's leading enterprises participate. The Gartner CIO team understands CIO challenges, the CIO environment, and CIO needs. Gartner created this highly professional advisory service to help CIOs and their teams succeed.

Gartner for IT Executive Programs offer you a **variety of services**, including:

- Professional inquiry services
- Focused CIO–IT Research Reports
- Gartner IT Executive sponsored Events
- Gartner IT Executive Local Roundtables
- CIO entrance and VIP treatment at Gartner Symposium
- Access to a wealth of Gartner Research

There are multiple **levels of service** within the Gartner for IT Executive Programs:

- Gartner for IT Executives—CIO Signature
- Gartner for IT Executives—CIO
- Gartner for IT Executives—CIO Essentials
- Gartner for Leadership Development
- EXP HR

#### **4.1 Gartner for IT Executives—CIO Signature**

The Gartner for IT Executives CIO Signature membership (the “Service”) is for the most senior-level IT executives of complex organizations or enterprises whose business models rely heavily on IT. This Service provides Client with an ongoing advisory relationship with Gartner and assistance in crafting answers to questions where standard industry practices have not yet been defined.

##### ***Deliverables***

Client may designate two (2) Licensed Users, referred to herein as: (i) the “Member,” who has access to all of the Deliverables described below (except for the Professional Development for the Delegate); and (ii) the “Delegate,” who has access only to the Content, Assigned Service Delivery Team, Professional Development for the Delegate, Advisory Services, Symposium/ITxpo<sup>®</sup>, and Online Networking (Gartner peer Connect) Deliverables described below.

##### **Content**

- **Executive Programs Research Reports**—Up to 12 (twelve) Reports per year; covering topics selected by Gartner such as IT Governance, Business Value of IT, Architecture, and other areas where business and IT intersect.

**Gartner for Leadership Development**—Developed for the aspiring CIO and the professional development of the Delegate and accessed via the Gartner for Leadership Development website.

**Gartner for IT Executives**—Targeted role-specific content, such as podcasts, videocasts, polling, and top research picks accessed via any of the Gartner for IT Executives role websites.

**Teleconferences**—Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors to discuss the topics of their Research Reports.

**Access to Gartner Core Research.**

**Access to Gartner for IT Leaders**—content and role pages.

**Talking Technologies Series**—Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on gartner.com or downloaded to listen to in an MP3 format.

**Note:** Schedules referenced above are approximations and are dependent on the publication schedule of relevant Research.

### **Use of Research**

The Member and the Delegate may each, on an occasional and infrequent basis, forward to specific individuals within the Client organization copies of individual research documents: (i) not to exceed 25 (twenty-five) separate documents per contract year for the Member, and (ii) not to exceed 25 (twenty-five) separate documents per contract year for the Delegate, for the purpose of facilitating executive decision-making. This forwarding of documents may not be done on a routine basis, or by means of posting on Client's corporate intranet, or in any other manner that has the intent or effect of avoiding the purchase of additional User licenses from Gartner.

### **Assigned Service Delivery Team**

A service delivery team ("Delivery Team"), consisting of an Executive Partner and an Executive Client Manager, will be assigned to the Member and their respective Delegate, and will serve as the Member's primary points of contact for all Gartner resources available under this Service. The Delivery Team will work with the Member to develop a plan (the "Member Value Plan"), which will highlight value sought; identify key issues on which delivery of the Member's Service may focus; and outline how the Service can effectively deliver that value. Progress against the Member Value Plan will be reviewed during the contract year as follows:

- **Strategy Meetings**—Up to four (4) times per year, the Executive Partner will meet face to face with either the Member, the Member and the Delegate, or the Delegate on the Member's behalf ("Strategy Meeting"). These Strategy Meetings may be used to: (i) review and apply Executive Programs Research, the annual Executive Programs CIO Agenda, or other relevant content; (ii) draw on the Executive Partner's professional experience to advise the Member in the context of the Member's issues; and (iii) develop, discuss the progress of, or evaluate the Member's Member Value Plan.
- **Optional Substitutions for Strategy Meetings**—Each of the following architected sessions are available to the Member for their use during the contract period. The Delivery Team will work with the Member to determine which, if any, of these sessions would be of value for inclusion in the Member Value Plan. Each session used by the Member will count as one (1) of the four (4) Strategy Meetings to which they are entitled annually. Participation in these sessions is limited to the Member and members of the Member's team (as reasonably required for the Member's business purposes). In all

instances, the Member must be present and the purpose of the session must be to advance the Member's agenda. Each of the following sessions may be used once per contract year:

- a. **On-site Analyst Briefing**—Member meets on Client premises with a Gartner Analyst for a half-day for knowledge-based, individual or project advisory assistance, typically involving delivery of Gartner Content.
- b. **Executive Programs Workshop**—Member meets on Client premises with Gartner Executive Programs Expert for a half-day facilitated workshop focusing on the application of Gartner Executive Programs Research and action planning. Topic for the workshop will be selected by the Member and the Delivery Team from a list of available Executive Programs workshops and participation will be limited to 25 (twenty-five) Members and/or team members.

**Contextualized Targeted Gartner Research**—On an as-needed basis, the Delivery Team will e-mail to the Member or Delegate selected Research which has been synthesized and put into the Member's context, based on the Member Value Plan.

### **Professional Development for the Delegate**

The Member has the option of providing professional development to the Delegate. At Member's option, the following will be offered to the Delegate:

- **Individual Development Plan**—The assigned Executive Partner will work with the Delegate to develop an individual development plan (the "Individual Development Plan"), which will highlight objectives sought, identify key areas of focus, and outline how the Service can effectively meet those goals. Progress against the Individual Development Plan will be reviewed during the contract year as follows:

**Coaching Teleconferences**—Up to four (4) times per year, the Executive Partner will conduct teleconferences ("Coaching Teleconferences") with the Delegate. These Coaching Teleconferences may be used to: (i) review and apply Gartner for Leadership Development Research, Executive Programs research, or other relevant content; (ii) draw on the Executive Partner's professional experience to advise the Delegate in the context of the Delegate's professional and career goals; and (iii) develop, discuss the progress of, or evaluate the Delegate's Individual Development Plan.

### **Advisory Services**

- **Gartner for IT Executives Analyst Inquiry**—Provides the Member and the Delegate with access to Gartner Analysts who are associated with the Service purchased by Client.
  - a. Participation in Analyst Inquiry is limited to the Gartner Analyst, the Member and/or the Delegate, and members of the Member's team (as reasonably required for the Member's business purposes). In all instances, the Member and/or the Delegate must be present on the Inquiry call and the purpose of the Inquiry call must be to advance the Member's agenda.
  - b. Participation in Analyst Inquiry as part of this Service is subject to the terms set forth in the Usage Guidelines for Gartner Services posted on gartner.com.

**Executive Programs CIO Research Inquiries**—Inquiry access to Gartner Executive Programs CIO Researchers through IT Executives Analyst Inquiry; limited to topics covered in Executive Programs Research Reports, as published by Gartner Executive Programs.

**Events**

- **Symposium/ITxpo**—Two (2) complimentary invitations for attendance to Gartner Symposium/ITxpo, including all standard Symposium attendee rights plus Executive Programs VIP access. These invitations are non-transferable except between the Member and their named Delegate.

**Exclusive Executive Programs Events**—Complimentary nontransferable invitation for attendance, by the Member only, at local content-based Gartner Events in Member’s region or country.

**Networking**

**Facilitated Networking**—Member may request meetings or conference calls with peers around a specific topic/issue in order to exchange information about best practices or areas of expertise. Available to the Member only.

**Online Networking**—Access to Gartner Peer Connect.

**Note:** Unless otherwise provided above: (i) you must be a Licensed User to access Gartner Research Services; (ii) passwords, Research documents and Analyst Inquiry may not be shared with Non-Users; and (iii) your use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

**Table 13. Gartner for IT Executives–CIO Signature Pricing**

Description	Single Member Price	Multi-Member Price
Gartner for IT Executives— CIO Signature	\$80,590	\$80,590

**Notes:**

1. Multi-member pricing for CIO Signature memberships is not available.
2. CIO Signature contributes (“counts”) toward multi user price levels on other Gartner Product offerings within the same agency and services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
3. All CIO Signature Memberships require an annual contract.
4. All CIO Signature Memberships commence on the first day of the calendar month.
5. Pricing is for Annual Membership.
6. All Deliverables are available to the Named Users only.
7. Services are to be used for each Member’s individual business purposes for the benefit of the Client organization.
8. Gartner periodically updates Service names and Deliverables to reflect Client needs and market relevance.

**4.2 Gartner for IT Executives–CIO**

The Gartner for IT Executives CIO membership (the “Service”) is for the most senior-level IT executives of complex organizations or enterprises whose business models rely heavily on IT. This Service provides the Client with an ongoing advisory relationship with Gartner and assistance in crafting answers to questions where standard industry practices have not yet been defined.

**4.2.1 Deliverables**

Client may designate one (1) Licensed User, referred to herein as the “Member,” who has access to the Deliverables described below.

## **Content**

- **Executive Programs Research Reports**—Up to 12 (twelve) Reports per year; covering topics selected by Gartner such as IT Governance, Business Value of IT, Architecture, and other areas where business and IT intersect.
- **Gartner for IT Executives**—Targeted role-specific content, such as podcasts, videocasts, polling, and top research picks accessed via any of the Gartner for IT Executives role websites.
- **Teleconferences**—Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors to discuss the topics of their Research Reports.
- **Access to Gartner Core Research.**
- **Access to Gartner for IT Leaders**—Content and role pages.
- **Talking Technologies Series**—Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on gartner.com or downloaded to listen to in an MP3 format.

**Note:** Schedules referenced above are approximations and are dependent on the publication schedule of relevant Research.

## **Use of Research**

The Member may, on an occasional and infrequent basis, forward to specific individuals within the Client organization copies of individual research documents, not to exceed 25 (twenty-five) separate documents per contract year, for the purpose of facilitating executive decision making. This forwarding of documents may not be done on a routine basis, or by means of posting on Client's corporate intranet, or in any other manner that has the intent or effect of avoiding the purchase of additional User licenses from Gartner.

## **Assigned Service Delivery Team**

A service delivery team ("Delivery Team"), consisting of an Executive Partner and an Executive Client Manager, will be assigned to the Member, and will serve as the Member's primary points of contact for all Gartner resources available under this Service. The Delivery Team will work with the Member to develop a plan (the "Member Value Plan"), which will highlight value sought; identify key issues on which delivery of the Member's Service may focus; and outline how the Service can effectively deliver that value. Progress against the Member Value Plan will be reviewed during the contract year as follows:

- **Strategy Meetings**—Up to four (4) times per year, the Executive Partner will meet face to face with the Member (the "Strategy Meeting"). These Strategy Meetings may be used to: (i) review and apply Executive Programs Research, the annual Executive Programs CIO Agenda, or other relevant content; (ii) draw on the Executive Partner's professional experience to advise the Member in the context of the Member's issues; and (iii) develop, discuss the progress of, or evaluate the Member's Member Value Plan.
- **Optional Substitutions for Strategy Meetings**—Each of the following architected services are available to the Member for their use during the contract period. The Delivery Team will work with the Member to determine which, if any, of these services would be of value for inclusion in the Member Value Plan. Each session used by the Member will count as one (1) of the four (4) Strategy meetings to which they are entitled annually. Participation in these sessions is limited to the Member and members of the Member's team (as reasonably required for the Member's business purposes). In all

instances, the Member must be present and the purpose of the session must be to advance the Member's agenda. Each of the following options may be used only once per contract year:

- **On-site Analyst Briefing**—Member meets on Client premises with a Gartner Analyst for a half-day for knowledge-based, individual or project advisory assistance, typically involving delivery of Gartner Content.
- **Executive Programs Workshop**—Member meets on Client premises with Gartner Executive Programs Expert for a half-day facilitated workshop focusing on the application of Gartner Executive Programs Research and action planning. Topic for the workshop will be selected by the Member and the Delivery Team from a list of available Executive Programs workshops and participation will be limited to 25 (twenty-five) Members.
- **Contextualized Targeted Gartner Research**—On an as-needed basis, the Executive Client Manager will e-mail to the Member selected Research which has been synthesized and put into the Member's context, based on the Member Value Plan.

### **Advisory Services**

- **Gartner for IT Executives Analyst Inquiry**—Provides the Member with access to Gartner Analysts who are associated with the Service purchased by Client.
  - Participation in Analyst Inquiry is limited to the Gartner Analyst, the Member, and members of the Member's team (as reasonably required for the Member's business purposes). In all instances, the Member must be present on the Inquiry call and the purpose of the Inquiry call must be to advance the Member's agenda.
  - Participation in Analyst Inquiry as part of this Service is subject to the terms set forth in the Usage Guidelines for Gartner Services posted on gartner.com.
- **Executive Programs CIO Research Inquiries**—Inquiry access to Gartner Executive Programs CIO Researchers through IT Executives Analyst Inquiry; limited to topics covered in the Executive Programs Research Reports, as published by Gartner Executive Programs.

### **Events**

- **Symposium/ITxpo®**—One (1) complimentary invitation for attendance to Gartner Symposium/ITxpo, including all standard Symposium attendee rights plus Executive Programs VIP access. This invitation is non-transferable.
- **Exclusive Executive Programs Events**—Complimentary nontransferable invitation for attendance, by the Member only, at local content-based Gartner Events in Member's region or country.

### **Networking**

- **Facilitated Networking**—Member may request meetings or conference calls with peers around a specific topic/issue in order to exchange information about best practices or areas of expertise. Available to Member only.
- **Online Networking**—Access to Gartner Peer Connect.

**Note:** Unless otherwise provided above: (i) you must be a Licensed User to access Gartner Research Services; (ii) passwords, Research documents and Analyst Inquiry may not be shared with Non-Users; and (iii) your use of this

Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

**Table 14. Gartner for IT Executives–CIO Pricing**

Description	Single Member Price	Multi-Member Price
Gartner for IT Executives–CIO	\$72,880	\$64,690

**Notes:**

1. CIO contributes (“counts”) toward multi user price levels on other Gartner Product offerings within the same agency and services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
2. All other Gartner product offerings within the same agency, excluding add-on services, contribute (“count”) toward multi user/member pricing for CIO.
3. All CIO Memberships require an annual contract.
4. All CIO Memberships commence on the first day of the calendar month.
5. Pricing is for Annual membership.
6. All Deliverables are available to the Named Users only.
7. Services are to be used for each Member’s individual business purposes for the benefit of the Client organization.
8. Gartner periodically updates Service names and Deliverables to reflect Client needs and market relevance.

### 4.3 Gartner for IT Executives–CIO Essentials

Gartner for IT Executives CIO Essentials (the “Service”) is intended to assist the most senior-level IT executives in operating their business as cost-effectively as possible.

#### 4.3.1 Deliverables

Client may designate one (1) Licensed User, referred to herein as the “Member,” who has access to the Deliverables described below.

**Content**

- **Executive Programs Research Reports**—Up to 12 (twelve) Reports per year; covering topics selected by Gartner such as IT Governance, Business Value of IT, Architecture, and other areas where business and IT intersect.
- **Gartner for IT Executives**—Targeted role-specific content, such as podcasts, videocasts, polling, and top research picks accessed via any of the Gartner for IT Executives role websites.
- **Teleconferences**—Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors to discuss the topics of their Research Reports.
- **Access to Gartner Core Research.**
- **Access to Gartner for IT Leaders**—content and role pages.
- **Talking Technologies Series**—Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on gartner.com or downloaded to listen to in an MP3 format.

**Note:** Schedules referenced above are approximations and are dependent on the publication schedule of relevant Research.

### **Use of Research**

The Member may, on an occasional and infrequent basis, forward to specific individuals within the Client organization copies of individual research documents, not to exceed 25 (twenty-five) separate documents per contract year, for the purpose of facilitating executive decision making. This forwarding of documents may not be done on a routine basis, or by means of posting on Client's corporate intranet, or in any other manner that has the intent or effect of avoiding the purchase of additional User licenses from Gartner.

### **Assigned Service Delivery Team**

A service delivery team ("Delivery Team"), consisting of an Executive Advisor and an Executive Client Manager, will be assigned to the Member, and will serve as the Member's primary points of contact for all Gartner resources available under this Service. The Delivery Team will work with the Member to develop a plan (the "Member Value Plan"), which will highlight value sought; identify key issues on which delivery of the Member's Service may focus; and outline how the Service can effectively deliver that value. Progress against the Member Value Plan will be reviewed during the contract year as follows:

- **Review Meetings**—Up to two (2) times per year, the Executive Advisor will meet face to face with the Member (the "Review Meeting"). These Review Meetings may be used to: (i) review and apply Executive Programs Research, the annual Executive Programs CIO Agenda, or other relevant content; (ii) understand the Member's current initiatives; and (iii) develop, discuss the progress of, or evaluate the Member's Member Value Plan.
- **Summarized Targeted Gartner Research**—On an as-needed basis, Delivery Team will e-mail to the Member the appropriate Research based on the Member's Inquiry, summarize it, and highlight the parts pertaining specifically to the Inquiry.

### **Advisory Services**

- **Gartner for IT Executives Analyst Inquiry**—Provides the Member with access to Gartner Analysts who are associated with the Service purchased by Client. Participation in Analyst Inquiry as part of this Service is subject to the following terms:
  - Participation in Analyst Inquiry is limited to the Gartner Analyst, the Member, and members of the Member's team (as reasonably required for the Member's business purposes). In all instances, the Member must be present on the Inquiry call and the purpose of the Inquiry call must be to advance the Member's agenda.
  - Participation in Analyst Inquiry as part of this Service is subject to the terms set forth in the Usage Guidelines for Gartner Services posted on gartner.com.
- **Executive Programs CIO Research Inquiries**—Inquiry access to Gartner Executive Programs CIO Researchers through IT Executives Analyst Inquiry; limited to topics covered in the Executive Programs Research Reports, as published by Gartner Executive Programs.
  -

**Events**

- **Symposium/ITxpo®**—One (1) complimentary invitation for attendance to Gartner Symposium/ITxpo, including all standard Symposium attendee rights plus Executive Programs VIP access. This invitation is non-transferable.
- **Exclusive Executive Programs Events**—Complimentary nontransferable invitation for attendance, by the Member only, at local content-based Gartner Events in Member’s region or country.

**Networking**

- **Facilitated Networking**—Member may request meetings or conference calls with peers around a specific topic/issue in order to exchange information about best practices or areas of expertise.
- **Online Networking**—Access to Gartner Peer Connect.

**Note:** Unless otherwise provided above: (i) you must be a Licensed User to access Gartner Research Services; (ii) passwords, Research documents and Analyst Inquiry may not be shared with Non-Users; and (iii) your use of this Service is governed by the Usage Guidelines for Gartner Services, which are in the Policies section of gartner.com.

**Table 15. Gartner for IT Executives–CIO Essentials Pricing**

Description	Single Member Price	Multi-Member Price
IT Executives–CIO Essentials	\$48,740	\$43,600

**Notes:**

1. CIO Essentials contributes (“counts”) toward multi user price levels on other Gartner Product offerings within the same agency and services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
2. All other Gartner product offerings within the same agency, excluding add-on services, contribute (“count”) toward multi user/member pricing for CIO Essentials.
3. All CIO Essentials Memberships require an annual contract.
4. All CIO Essentials Memberships commence on the first day of the calendar month.
5. Pricing is for Annual membership.
6. All Deliverables are available to the Named Users only.
7. Services are to be used for each Member’s individual business purposes for the benefit of the Client organization.
8. Gartner periodically updates Service names and Deliverables to reflect Client needs and market relevance.

## 4.4 EXP HR

An annual membership program for HR professionals and leaders focused on workforce planning/organization development. The program provides access to research, peer forums to share best practices, and access to Gartner Human Capital Management (HCM) experts.

Gartner EXP HR is a service that provides research and advice for Human Resources (HR) executives within IT organizations as well as IT executives who focus on workforce management issues.

### 4.4.1 Deliverables

Client may designate one named User, referred to herein as a “Member,” who will have access to the following Deliverables:

- **Member-Only Research**—Members receive exclusive Gartner EXP HR Research Reports offering strategic insight into the effective management of IT professionals. Members receive four Reports per year, delivered quarterly in hardcopy format. Report topics are driven by both EXP HR Members as well as the EXP HR Research agenda. Members also receive the Gartner IT Market Compensation Study, an annual Report providing compensation data on more than 130 IT positions. As a supplement to the IT Market Compensation Study, EXP HR Members also receive 4 trending Reports, delivered quarterly in hardcopy format.
- **Quarterly Teleconferences**—Leverage Web-based technology to provide a virtual forum for collaboration around a central topic (driven by Member requests and the EXP HR research agenda) and provide a means for ongoing dialogue between Member events.
- **Dedicated Program Director**—A dedicated Program Director will be assigned to each Member and will serve as the Member’s single point of contact for all Gartner resources available in this offering. A service plan (the “Plan”) will be created with the Member to highlight value sought; to identify Member’s key issues on which delivery of this offering may focus; and to outline how this offering will deliver that value. Progress against the Plan will be reviewed periodically during the year.
- **Inquiry**—Member has Inquiry access to EXP HR subject matter experts through Standard Analyst Inquiry; limited to topics covered in the product offering, as determined by Gartner.

### Events

- **Biannual EXP HR Summits**—Featuring speakers and industry leaders in a network-oriented setting, these content-rich sessions provide Member with the opportunity for face-to-face interaction with other Members and offer a broader forum for the sharing of best practices. These bi-annual summits are held in concert with Gartner Fall and Spring Symposium/ITxpo.

**Gartner Symposium/ITxpo**—One nontransferable complimentary attendance for the Member to either Fall or Spring Symposium/ITxpo.

**Peer Exchange**

- **Networking and Learning**—In addition to networking and learning through Summits and quarterly teleconferences, Members may request a meeting or conference call with other EXP HR Members around a specific topic/issue in order to exchange information about best practices or areas of expertise. The Peer Connection Request is submitted to the Program Director, who will search for an appropriate match for peer exchange based on a number of criteria (e.g., topic expertise, scale of project, industry, etc.). After confirming that all participants are willing and able to network, the Program Director will provide contact details and a company profile to all parties.
- **Web-Based Access and Exchange**—Members will be granted access to two (2) content-rich Web-based tools:
  - **EXP-HR Member Web**—An online Member knowledgebase which provides access to practices contributed by other Members and by Gartner, and which provides real-time information exchange through discussion threads and real-time chat.
  - **Compensation Data Tool**—Enables Members to pull unique excerpts from the compensation database, e.g., industry, company size, IT shop size and geography.

**Notes:**

1. All Deliverables are available to the registered Member only.
2. You must be a Licensed User to access Gartner Research Services, including Analyst Inquiry. Unless otherwise provided above, passwords, Research documents and Analyst Inquiry may not be shared with non-Users.

**Table 16. EXP HR Pricing — “Renewal Only”\***

Description	Price
Standard Pricing (annual membership for one member)	\$35,450
Multi membership—second and additional memberships from the same agency	\$31,960

**\*Renewal only effective November 1, 2010, no longer available for new orders. Renewal of existing order are available through June 30, 2011**

**Notes:**

1. EXP HR (“counts”) toward multi user price levels on other Gartner Product offerings within the same agency and services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
2. All other Gartner product offerings within the same agency, excluding add-on services, contribute (“count”) toward multi user/member pricing for EXP HR.
3. All EXP memberships commence on the first day of a calendar month.
4. Services are to be used for each EXP HR Member’s individual business purposes for the benefit of Client Organization
5. Gartner periodically updates Service names and deliverables to reflect client needs and market relevance.

## 4.5 Gartner for Leadership Development

Gartner for Leadership Development Add-On (the “Service”) is a membership-based program for senior IT professionals who report to the CIO, which provides them with the professional resources they need to help bridge the gap between the IT professional and CIO. This Service is available only to Licensed Users (referred to herein as “Members”) who also have access to Gartner for IT Leaders Advisor or Premier, IAS-G Gold Advisor, or Executive Programs Delegate.

### 4.5.1 Deliverables

Client may designate one “Member,” who will have access to the following:

#### Content\*

- **Executive Programs Research Reports**—Up to 12 (twelve) Reports per year, covering topics selected by Gartner that address where business and IT intersect.
- **Teleconferences**—Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors to discuss the topic of their Research Report.
- **Access to Gartner for Leadership Development Role-Based Web Page**—Includes targeted Research, podcasts, CIO learning modules, videocasts, polling, top Research picks, and market news.

\*Schedules above are approximations and are dependent on the publication schedule of the relevant research.

- **Assigned Executive Client Manager**—Member’s primary point of contact for all Gartner resources available under this Service.
- **Assigned Executive Partner**—Works with Member to develop the Member Development Plan (“the Plan”). Progress against the Plan will be reviewed up to four (4) times per contract year via Professional Development Coaching Calls in which the Executive Partner will teleconference with the Member to (i) review and apply the Deliverables referenced above, and (ii) develop, discuss the progress of, and/or evaluate the Plan.
- **Development**—Gartner for Leadership Development Learning Modules
- **IT Executive Development Academy**—One (1) non-transferable invitation for attendance at a one and one-half-day (1.5-day) Academy session.

**Note:** Unless otherwise provided above: (i) you must be a Licensed User to access Gartner Research Services; (ii) passwords, Research documents and Analyst Inquiry may not be shared with Non-Users; and (iii) your use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

**Table 17. Gartner for Leadership Development Pricing**

Description	Price
Standard Pricing (annual membership for one Member)	\$18,680

**Notes:**

1. Gartner for Leadership Development membership eligibility is restricted to Gartner for IT Leaders Advisor or Premier members and IT Executive Signature Delegates.

2. Gartner for Leadership Development contract term must be coterminous with Gartner for IT Leaders Advisor or Premier and IT Executive Signature Delegates.
3. Gartner for IT Leaders Advisor, Premier and IT Executives Signature Delegates with less than nine months remaining in their contract term are not eligible to add Gartner for Leadership Development.
4. EXP CIO Signature and Gartner for IT Executives members are not eligible to purchase Gartner for Leadership Development.
5. Gartner for Leadership Development contributes (“counts”) toward multi user price levels on other Gartner Product offerings within the same agency and services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
6. Gartner for Leadership Development is not available for multi-member discount.
7. All Gartner for Leadership Development memberships commence on the first day of a calendar month
8. All GLD deliverables are available to the registered Member only.
9. Services are to be used for each Member’s individual business purposes for the benefit of Client.
10. Gartner periodically updates Service names and deliverables to reflect client needs and market relevance.

## 4.6 Gartner for IT Executives—Two Additional Meetings Add-On

The Gartner for IT Executives Two Additional Meetings Add-on (the “Service”) provides Gartner for IT Executives Licensed Users (“Members”) with two (2) face-to-face strategy meetings (“Sessions”) with their assigned primary service delivery associate (“Executive Partner”). This Service is available only to Members who also have a Gartner for IT Executives CIO Signature membership or a Gartner for IT Executives CIO membership.

### 4.6.1 Deliverables

- The Executive Partner offers insight into the Member’s specific needs, objectives, and challenges during the Sessions.
- Each of the two (2) Sessions may take up to three (3) hours and are of the same purpose and type as those in the Member’s base membership.

### 4.6.2 Scheduling of the Sessions

- Specific dates and details of the Sessions will be worked out between the Member and the Executive Partner at the start of the contract period set forth in the relevant Service Agreement or Delivery Order.
- Gartner will send the Member a confirmation e-mail prior to each Session.
- If, for any reason, the scheduled Executive Partner becomes unavailable, Gartner will provide another qualified Executive Partner or work with the Member to reschedule the Session.

**Note:** Each of the two three-hour Sessions may not be divided into more than two (2) individual meetings.

- All Sessions must occur within the contract term set forth in the Service Agreement or Delivery Order or the fees paid will be forfeited.
- Sessions may not be recorded.
- The Deliverables are available to the registered Member only and are for Client’s internal purposes and may not be disclosed or otherwise made available to outside parties.

- Unless otherwise provided above: (i) you must be a Licensed User to access Gartner Research Services; (ii) passwords, Research documents and Analyst Inquiry may not be shared with Non-Users; and (iii) your use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

**Table 18. Gartner Meeting Add-ons: Pricing**

Description	Single Member Price	Multi-Member Price
Meeting Add-on	\$12,780	n/a

**Notes:**

1. Limited availability—contact your Gartner Account Executive.
  - a. CIO Signature Delegate Add-on may be added to CIO Signature, coterminous with the existing contract end date. Price of the additional member will not be pro-rated if the remaining term is less than 12 months.
  - b. Meeting Add-on may be added to IT Executives—CIO Signature, IT Executives—CIO, Enterprise for IT Leaders, or Enterprise for Supply Chain Leaders memberships, coterminous with the existing contract end date. Price of the additional member will not be pro-rated if the remaining term is less than 12 months.
2. Multi-member pricing for Add-on memberships is not available.
3. “Add-on” Gartner product memberships do not contribute (“count”) toward multi user price levels on other Gartner Product offerings within the same agency.
4. Pricing is for an annual membership.

## 4.7 Delegate Add-on for Gartner for IT Executives CIO Signature

The Delegate Add-on for Gartner for IT Executives CIO Signature (the “Service”) permits Licensed Users of the Gartner for IT Executives CIO Signature Program, referred to herein as “Members,” to designate a second Licensed User, herein referred to as the “Delegate,” for the purpose of assisting the Member and furthering the Member’s agenda and priorities.

### 4.7.1 Deliverables

The Delegate will be entitled to the following Member Deliverables under the Gartner for IT Executives CIO Signature program.

#### Content

- **Executive Programs Research Reports**—Up to 12 (twelve) Reports per year; covering topics selected by Gartner such as IT Governance, Business Value of IT, Architecture, and other areas where business and IT intersect.
- **Gartner for IT Executives**—Targeted role-specific content, such as activity cycles, podcasts, videocasts, polling, and top research picks accessed via any of the Gartner for IT Executives role websites.
- **Teleconferences**—Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors, to discuss the topics of their Research Reports.
- **Access to Gartner Core Research.**
- **Access to Gartner for IT Leaders**—Content and role pages.

- **Talking Technologies Series**—Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on gartner.com or downloaded to listen to in an MP3 format.

**Note:** Schedules referenced above are approximations and are dependent on the publication schedule of relevant Research.

### **Use of Research**

The Member may, on an occasional and infrequent basis, forward to specific individuals within the Client organization copies of individual research documents, not to exceed 25 (twenty-five) separate documents per contract year, for the purpose of facilitating executive decision making. This forwarding of documents may not be done on a routine basis, or by means of posting on Client's corporate intranet, or in any other manner that has the intent or effect of avoiding the purchase of additional User licenses from Gartner.

### **Assigned Service Delivery Team**

A service delivery team ("Delivery Team"), consisting of an Executive Partner and an Executive Client Manager, will be assigned to the Member, and will serve as the Member's primary points of contact for all Gartner resources available under this Service. The Delivery Team will work with the Member to develop a plan (the "Member Value Plan"), which will highlight value sought; identify key issues on which delivery of the Member's Service may focus; and outline how the Service can effectively deliver that value. Progress against the Member Value Plan will be reviewed during the contract year as follows:

- **Strategy Meetings**—Up to four (4) times per year, the Executive Partner will meet face to face with either the Member, the Member and the Delegate, or the Delegate on the Member's behalf ("Strategy Meeting"). These Strategy Meetings are included in the Members' IT Executives CIO Signature membership.

**Contextualized Targeted Gartner Research**—On an as-needed basis, the Executive Client Manager will e-mail to the Member selected Research which has been synthesized and put into the Member's context, based on the Member Value Plan.

### **Advisory Services**

- **Gartner for IT Executives Analyst Inquiry**—Provides the Delegate with access to Gartner Analysts who are associated with the Service purchased by Client.
  - Participation in Analyst Inquiry is limited to the Gartner Analyst, the Member and/or the Delegate, and members of the Member's team (as reasonably required for the Member's business purposes). In all instances, the Member and/or the Delegate must be present on the Inquiry call and the purpose of the Inquiry call must be to advance the Member's agenda.
  - Participation in Analyst Inquiry as part of this Service is subject to the terms set forth in the Usage Guidelines for Gartner Services posted on gartner.com.
- **Executive Programs CIO Research Inquiries**—Inquiry access to Gartner Executive Programs CIO Researchers through IT Executives Analyst Inquiry; limited to topics covered in the Executive Programs Research Reports, as published by Gartner Executive Programs.

**Events**

Symposium/ITxpo®—One (1) complimentary invitation for attendance to Gartner Symposium/ITxpo, including all standard Symposium attendee rights plus Executive Programs VIP access. This invitation is non-transferable except between the Member and their named Delegate.

**Online Networking**

Access to the IT Executives online networking features.

**Note:** Unless otherwise provided above: (i) you must be a Licensed User to access Gartner Research Services; (ii) passwords, Research documents and Analyst Inquiry may not be shared with Non-Users; and (iii) your use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com.

**Notes:**

1. Limited availability; contact your Gartner Account Executive.
2. CIO Signature Delegate Add-on may be added to CIO Signature, coterminous with the existing contract end date. Price of the additional member will not be pro-rated if the remaining term is less than 12 months.
3. IT Executives Meeting Add-on may be added to CIO Signature or CIO members, coterminous with the existing contract end date. Price of the additional member will not be pro-rated if the remaining term is less than 12 months.
4. Multi-member pricing for IT Executive Add-on memberships is not available.
5. “Add-on” Gartner product memberships do not contribute (“count”) toward multi user price levels on other Gartner Product offerings within the same agency.

**Table 19. Gartner CIO Signature Delegate Add-ons: Pricing**

Description	Single Member Price	Multi-Member Price
CIO Signature Delegate Add-on	\$34,210	n/a

**Notes:**

1. Limited availability—contact your Gartner Account Executive.
  - a. CIO Signature Delegate Add-on may be added to CIO Signature, coterminous with the existing contract end date. Price of the additional member will not be pro-rated if the remaining term is less than 12 months.
  - b. Meeting Add-on may be added to IT Executives–CIO Signature, IT Executives–CIO, Enterprise for IT Leaders, or Enterprise for Supply Chain Leaders memberships, coterminous with the existing contract end date. Price of the additional member will not be pro-rated if the remaining term is less than 12 months.
2. Multi-member pricing for Add-on memberships is not available.
3. “Add-on” Gartner product memberships do not contribute (“count”) toward multi user price levels on other Gartner Product offerings within the same agency.
4. Pricing is for an annual membership.

**5.0 Guidelines for Gartner Services**

**Services** are the subscription-based research and related services described herein. Service Descriptions, Names and Levels of Access are as detailed for each product offering. Gartner may periodically update the names and the deliverables for each Service.

**Modification of Services by Gartner.** In order to remain current and timely in its Service offerings, Gartner may make minor modifications from time to time in the content of any Service.

If Gartner discontinues any Service in its entirety, Client may, at its option, receive a substitute Service, or obtain a pro rata refund of the fees paid for the discontinued Service.

**User** is the individual named in the Client Purchase Order (each a "**Licensed User**") who is licensed to use the Services. Client will limit access to the Services to the agreed upon number of Users.

## 5.1 Ownership and Use of the Services

Gartner owns and retains all rights to the Services not expressly granted to Client. Only the individuals named in the Client Purchase Order (each a "**Licensed User**") may access the Services. Each Licensed User will be issued a unique password, which may not be shared. Client agrees to review and comply with the **Usage Guidelines for Gartner Services** ("**Guidelines**"), which are accessible to all Licensed Users via the "Policies" section of [www.gartner.com](http://www.gartner.com). Among other things, these Guidelines describe how Client may substitute Licensed Users, excerpt from and/or share Gartner research documents within the Client organization, and quote or excerpt from the Services externally.

Client may not redistribute copies of individual research documents, by electronic means or otherwise, to non-Users without Gartner's prior written permission. Users may not reproduce or distribute the Services externally without Gartner's prior written permission, except for external distribution, in their entirety only, of reprints of individual documents purchased by Client. Client may excerpt from the Services for external use only if Client obtains the prior written approval of Gartner Vendor Relations, at [vendor.relations@gartner.com](mailto:vendor.relations@gartner.com). Any approved external use of the Services must comply with Gartner's *Copyright and Quote Policy* which may be viewed on the Gartner Vendor Relations section of [www.gartner.com](http://www.gartner.com). Services may not be stored by Client on any information storage and retrieval system.

## 5.2 Access to the Services

IDs for access to Gartner Core Research and analyst inquiry may not be shared. Access to the Services is restricted to the number of named individuals (each a "User") as identified in the Client Purchase Order.

## 5.3 Monitoring of Usage

The Client acknowledges and agrees to inform all Users that Gartner may monitor activity on Gartner's website, including access to, and use of, the Services by individuals. Upon request, Client agrees to provide Gartner with assurance from a responsible Contract Officer (or other relevant evidence) of compliance with these usage terms.

## 5.4 DISCLAIMER OF WARRANTIES

THE SERVICES ARE PROVIDED ON AN "AS IS" BASIS, AND GARTNER EXPRESSLY DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, STATUTORY OR OTHERWISE, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE OR AS TO ACCURACY, COMPLETENESS OR ADEQUACY OF INFORMATION. CLIENT RECOGNIZES THE UNCERTAINTIES INHERENT IN ANY ANALYSIS OR INFORMATION THAT MAY BE PROVIDED AS PART OF THE SERVICES, AND ACKNOWLEDGES THAT THE SERVICES ARE NOT A SUBSTITUTE FOR ITS OWN INDEPENDENT EVALUATION AND ANALYSIS AND SHOULD NOT BE CONSIDERED A RECOMMENDATION TO PURSUE ANY COURSE OF ACTION. GARTNER SHALL NOT BE LIABLE FOR ANY ACTIONS OR DECISIONS THAT CLIENT MAY TAKE BASED ON THE SERVICES OR ANY INFORMATION OR DATA CONTAINED THEREIN. CLIENT UNDERSTANDS THAT IT ASSUMES THE ENTIRE RISK WITH RESPECT TO THE USE OF THE SERVICES.

## 5.5 Client Confidential Information

Gartner agrees to keep confidential any Client-specific information communicated by Client to Gartner that is (i) clearly marked confidential if provided in written form, or (ii) preceded by a statement that such information is confidential, if provided in oral form, and such statement is confirmed in writing within 15 days of its initial disclosure. This obligation of confidence shall not apply to any information that: (1) is in the public domain at the time of its communication; (2) is independently developed by Gartner; (3) entered the public domain through no fault of Gartner subsequent to Client's communication to Gartner; (4) is in Gartner's possession free of any obligation of confidence at the time of Client's communication to Gartner; or (5) is communicated by the Client to a third party free of any obligation of confidence. Additionally, Gartner may disclose such information to the extent required by legal process. Client acknowledges that Gartner is in the business of researching and analyzing information technology and this obligation of confidence shall not apply to information obtained by Gartner's research, analysis or consulting organization(s) from other sources.

## 6.0 Gartner Burton Group Research & Advisory Services

Burton Group is the only IT research and advisory firm focused exclusively on offering in-depth analysis of infrastructure technologies. Grounded in its allegiance to the enterprise technologist, Burton Group grows far outside the shadow of vendor agendas. This independence stems from Burton Group's dedication to honest, in-depth research. The value of Burton Group's research is amplified by direct recommendations about how to plan, build, and manage enterprise architectures. Burton Group provides practical answers to questions about directories, security, identity management, application platforms, architecture, data center, collaboration and content, and network and telecom infrastructure. Dedicated to reaching deep into these issues, Burton Group shoulders the chore of sifting and sorting through the ever-changing and ever-growing number of technologies emerging each day. By delivering decisive recommendations, Burton Group frees technologists to focus on infrastructure rather than on research.

For flexibility in meeting the needs of the ordering activity/client, Burton Group provides a choice in its Gartner Research of Burton Group IT1 or any individual or combination of Coverage Areas. Burton Group provides these comprehensive services on an annual license basis.

## 6.1 Burton Group IT1

Burton Group IT1 provides comprehensive in-depth research and advice on strategic enterprise technologies. Burton Group IT1 provides access to all Burton Group infrastructure Coverage Areas—this includes coverage of infrastructure technologies, strategy adoption, and governance practices relating to application platforms and service orientation, collaboration and content, data center, data management, enterprise architecture, identity and privacy, network and telecom, and security and risk management.

Under the Burton Group IT1 program, in addition to the Coverage Areas listed below, the client will have access to all new infrastructure coverage areas that Burton Group launches during the license term, plus Enterprise Architecture (“EA”) and Cloud Computing. EA draws upon and cross-cuts multiple research coverage areas to help organizations effectively create alignment across IT disciplines and business operating models. Cloud Computing research guides IT organizations on the effective use of on-demand, external IT services (cloud) to create a more agile, focused, cost-effective IT operation.

### 6.1.1 *Research Assistance*

As a courtesy to Burton Group IT1 clients, Burton Group also offers research assistance. Burton Group IT1 clients can utilize the Burton Group Research.

### 6.1.2 *Research Coverage Areas*

Research coverage areas focus on in-depth analysis of infrastructure technologies, with emphasis on the following core technologies:

#### **Application Platform Strategies (“APS”)**

Application platform technologies and software platforms such as Java and J2EE, Microsoft Windows and .NET, enterprise application integration (EAI) and B2B integration, application development languages programming tools and techniques, and the key standards and protocols that support the development of the emerging Web services model.

#### **Collaboration and Content Strategies (“CCS”)**

Strategies for planning and integrating collaboration and content infrastructure to facilitate synergistic applications and comprehensively manage the content life cycle, including Blogs, Collaborative Applications, Content Analytics, Document Management, E-Mail and Calendaring, Forms, Instant Messaging (IM), Office Suites, Document formats and related standards, Records Management, Search and taxonomy, Social Software, Web Conferencing, Web Content Management, Wikis.

#### **Data Center Strategies (“DCS”)**

Data Center technologies and strategies including server and storage hardware, SANs, NAS, blades, power, cooling, virtualization, server operating systems, storage management software, data protection, storage interconnects and protocols, high availability, high performance computing, grids, disaster recovery and business continuity planning, and data center management.

### **Data Management Strategies (“DMS”)**

Data Management Strategies helps enterprises advance business performance through emerging data management opportunities that are based on the effective use of database management systems, XML data management and standards, data modeling tools and techniques, and business intelligence tools and services.

### **Identity and Privacy Strategies (“IdPS”)**

Enterprise infrastructure technologies, including Directory Services, Identity Management, and Policy, Privacy, and Personalization.

### **Network and Telecom Strategies (“NTS”)**

Network infrastructure technologies, such as Network Architecture, MPLS, Wireless, IP-VPNs WANs, LANs, MANs, SANs QoS, IP Telephony, Remote Access, Switching and Routing.

### **Security and Risk Management Strategies (“SRMS”)**

Critical technologies for the protection of enterprise infrastructures, including Risk Management, Network Security, Application and Content Security, and Security Concepts, Techniques and Approaches.

## **6.1.3 Content Access**

### **Via the Web—Unlimited Users**

Clients receive unrestricted, worldwide access to the entire content database of each coverage area licensed. Each coverage area database includes an archive of current and future report releases during the 12-month license term. Clients also receive access to the Reference Architecture Web-based content for the licensed coverage area(s). Burton Group commits to releasing 24 or more publishing events per year for each coverage area.

## **6.1.4 Content Types**

Burton Group Gartner Research include the following content deliverables

- Reference Architecture
- Methodologies and Best Practices
- Unlimited Analyst Dialogues
- TeleBriefings
- Catalyst Conference

**Note:** In updating, expanding, and improving its Gartner Research, Burton Group reserves the right to modify any coverage area name, content type and/or format. In the event of such modification, Burton Group commits to providing service content at least comparable to that licensed by the client as described herein.

### **In-Depth Research**

Burton Group’s research database features several types of documents that complement Burton Group’s online knowledgebase and decision-making framework, including Overviews, Reports and Topic Collections.

- **Overview**—Overviews provide a context for a particular network- or applications- infrastructure topic, defining the issues and setting the standards by which clients should evaluate vendors and products. Overview documents also give clients a sense of the future development of that technology.
- **Report**—Reports offer in-depth coverage of specific vendors, products, and technologies. Report documents examine the validity and impact of particular technologies. Report documents also examine vendor offerings and measure them against the ideal outlined in its associated Overview document. and **Topic Collections**—collections of documents on a single subject domain. These collections include three components: a Market Landscape document, a Technology and Standards document, and three or more Product Profiles. Topic Collections are collections of documents on a single subject domain. These collections include three components: a Market Landscape document, a Technology and Standards document, and three or more Product Profiles.
- **Market Landscape**—Provides framework, context, market assessment, and recommendations, independent of any single vendor.
- **Technology and Standards**—Dives into technical details, common implementations, architectures, and any relevant standards within the domain.
- **Product Profiles**—Cover a particular product and are written to a standard template so that readers can compare products side-by-side. Topic Collections use the same research methodology as Overviews and Reports, but provide a simpler navigational structure and method for comparing potential solutions side-by-side.
- **DocAlerts**—Burton Group provides DocAlerts as a courtesy to inform clients of new documents as they are published. This proactive alert system delivers notices to clients via e-mail. Each DocAlert contains a summary of the published analysis, as well as the hypertext-linked information needed to Research topics include:
  - **APS**—Microsoft.Net; J2EE and J2ME; XML RPC and Soap; UDDI and WSDL; XML Standards; Software Platforms; Application and Process Integration; Application Development and Mgmt.; Web Portals; B2B Integration; Integration Broker Servers; Messaging Services; XML Middleware Tools; SOAP Stacks; XML RPC's; Synchronous RPC's; Object Brokers; Message Brokers; Vendors and Products; Web Services
  - **CCS**—Technologies and standards (blogs, collaborative applications, content analytics, document management, document formats and related standards, e-mail and calendaring, forms, instant messaging (IM), office suites, records management, search and taxonomy, social software, Web conferencing, Web content management, Wikis); Products (collaboration/messaging environments, IBM Lotus Notes/Domino, IBM Lotus Sametime, IBM Workplace, Microsoft Exchange, Microsoft SharePoint, MS Live Communication Server, Oracle Collaboration Suite, Adobe (Macromedia) Breeze, Microsoft Office Groove 2007, Web Conferencing solutions, Cisco MeetingPlace, MS Live Meeting, IBM Lotus Web Conferencing); Operating and Management (knowledge management, management of collaboration and content, infrastructure, policies, procedures and governance issues, regulator compliance, related etiquette and incentive system issues)
  - **Cloud Computing**—Software-as-a-service (SaaS), Customer relationship management, Web conferencing, Online productivity applications, E-mail and online collaboration, Application Platforms-as-a-Service (PaaS), Online middleware, Software Infrastructure-as-a-Service (SlaaS), Online datasets, Identity and security

- services, Cloud security and risk management, Hardware Infrastructure-as-a-Service (HIaaS), Server Virtualization, Internal/Private clouds, Cloud Storage, Vendor management and auditing, Cloud economics, Co-Location and Hosting, Technologies and standards, Cloud Computing Interoperability Forum (CCIF), SNIA (storage networking industry association), DMTF
- ❑ **DCS**—Technologies, standards and guidance for server virtualization, storage virtualization, server and storage hardware, data center physical facilities (power and cooling), processors (Intel, AMD), server operating systems (x86 systems), storage interconnects and protocols, data protection (including backup, tape, D2D, D2D2T, snapshot, replication, continuous data protection [CDP]), high availability, disaster recovery, business continuity, high performance computational clusters, grids, desktop deployments (thin vs. thick clients), data center management, and autonomic and utility computing.
  - ❑ **DMS**—Business intelligence, Data mining, Data warehousing, Enterprise reporting, Online analytical processing (OLAP), Real-time data analytics, Data management, Data classification, Data enrichment, Data integration, Data modeling techniques and tools, Data quality, Data replication/synchronization, Data security, Data services, Integrating structured and unstructured data, Master data management (MDM), Metadata management, XML data management, Database management, Extended relational DBMSs, XML data management in DBMSs, Specialized DBMS models (such as object and streaming database servers), The role of DBMSs within superplatform architectures, Technologies and standards, Business domain models such as HL7 and XBRL, RELAX NG, Schematron, SQL, The Semantic Web, XForms, XML, XML Schema, XPath, XQuery, XSLT
  - ❑ **EA**—EA program startup, EA program recalibration, Effectiveness and value measurement, IT processes integration, Enterprise SOA, IT governance, EA competency, Process orientation, Business and information architecture, Application portfolio, Analysis and design techniques, SDLC integration and enterprise reuse, Business optimization Cross-domain infrastructure decisions, Business and IT alignment.
  - ❑ **IdPS**—Identity Repositories and Interfaces (major directory products, metadirectory, virtual directory, standards, APIs); Identity Assurance (registration, authentication technologies, SSO, Public Key Infrastructure, Federated Identity); Privacy, Personalization and Authorization (regulatory compliance, identity theft, identity-based authorization controls, access management systems, profiles and preferences); Identity Administration and Provisioning (self-service, delegated admin., role and group admin.) Provisioning and User Management; Digital Identity (RF-ID, asset identification and tracking); Mobility of Identity
  - ❑ **NTS**—Network Architecture; WAN; SANs; Wireless; IP Telephony; IP Multicast; QoS; IP Address Mgmt.; Remote Access; Resiliency; Switching and Routing; MANs; Building Wiring; Network and Transport Protocols; VPNs; MPLS; IP-VPNs; Optical Wireless
  - ❑ **SRMS**—Management Policies and Procedures (metrics, standards); Auditing and Testing (security event management); Incident Handling, Forensics, Disaster Recovery; Monitoring and Response; Technical Counter-Measures: Perimeters, Authorization, Content Security, Application Security; Op/Sys Security (cryptographic technologies, ERM, antivirus, anti-SPAM); Security Operations, Awareness and Non-Technical Counter-Measures (logical/physical security nexus); Patch Management

**Note:** EA and Cloud Computing are only available with the Burton Group IT1 License.

### **6.1.5 Reference Architecture**

Burton Group's Reference Architecture is a Web-based decision-support tool designed to help clients use research to make strategy and architecture decisions in the technological and organizational environment. Reference Architecture consists of three components:

- **Principles**—Provide context. Statements that effectively describe an organization's principles and beliefs concerning how to use IT resources in a two-to-three year planning window.
- **Technical Positions**—Drive decisions. "If-then-else" logic that establishes technical positions based upon the context defined in the Principles.
- **Templates**—Drive architecture. Interactive, Web-based, drill-down diagrams that build upon the Technical Positions in defining architecture. Burton Group's Reference Architecture facilitates infrastructure-planning objectives over a two- to three-year period and assists the client in identifying critical junctures in the client's decision-making process. A proven planning model, Reference Architecture is the only online, continually updated knowledgebase with an enterprisewide view of network infrastructure. This framework helps define the future of the client's network environment.

### **6.1.6 Methodologies and Best Practices Program: Consulting Tools on Paper**

Over the years, Burton Group has conducted hundreds of consulting and advisory engagements for enterprise organizations including Fortune and Global 2000, government, and higher education clients. Burton Group has since leveraged that extensive experience and knowledge, creating a tangible resource—the Methodologies and Best Practices (MBP) program. Burton Group clients have access to efficient methodologies of requirements collection, architecture development, and vendor/product selection.

### **6.1.7 Analyst Dialogues—Unlimited**

Burton Group provides *unlimited* interaction with its research team through dialogues. The dialogue service provides clients the ability to actively discuss with Burton Group expert Analysts and Consultants the technology and issues covered in Burton Group's documents and architecture technical positions.

Dialogues may include discussions of coverage areas included in licensed Burton Group research, briefings, and documents, as well as follow-up, clarification, and context-related issues concerning coverage area. The dialogue service does not include client-specific design, architecture, planning or reviews. Additional assistance is available in the form of consulting services. Each consulting engagement is charged separately based on Burton Group's expert analysis of detailed client requirements and architecture documents, with emphasis on any research and/or creation of deliverables for the client.

**For Burton Group IT1 Clients:** At the option of the client, one dialogue per contract-year may be scheduled on-site at the client's location, at no additional charge. This dialogue will be up to one-half business day in duration. Client is responsible for the reimbursement of travel and living expenses actually and reasonably incurred as the result of Analyst or Consultant travel to and from the site of the client dialogue. Burton Group suggests that all requests for dialogues be coordinated with Burton Group through one or two designated employees of the client. Burton Group may decline a dialogue request if it is determined that the dialogue topic requested is outside of the scope of the service licensed by the client.

### **6.1.8 TeleBriefings—Includes (3) Three Sites**

TeleBriefings complement Burton Group's research. Clients participate in regularly scheduled audio conference TeleBriefings presented by a Burton Group Analyst or Consultant. Each session consists of approximately 45 minutes of discussion by a Burton Group expert, followed by a Q&A session. Client anonymity is maintained during the Q&A session. TeleBriefings are an ideal venue in which to discuss best practices, applications of advanced technologies, and issues of network-life cycle management. Up to three Client sites may access each TeleBriefing, and there is no limit to the number of Client employees that may attend per site.

### **6.1.9 Catalyst Conference**

Catalyst is an intensive three-day conference that focuses on critical network- and applications-infrastructure issues. The only conference of its kind, Catalyst brings together vendors, end users, and Burton Group Analysts and Consultants in a dynamic, yet intimate forum. This industry-shaping conference is well known for its end-user driven agenda, sharp focus, and high-profile speakers. Since the first conference in 1993, Catalyst has reinforced Burton Group's reputation for substance, timeliness, credibility, and integrity.

## **6.2 Executive Advisory Program**

Burton Group's Executive Advisory Program (EAP) serves as an interface for executives into the Burton Group Gartner Research. This is accomplished using the following means:

- Research aimed at the needs of the CIO; with focus on Management Best Practices and Case Studies, Market Analysis, and Support for Large Initiatives.
- Unlimited dialogues with Executive Strategists.
- Clear relationship between management-focused research content and in-depth technology research.
- CIO-targeted events.

## **6.3 License Grant**

Upon acceptance of an Order, Burton Group will grant to the ordering activity a non-exclusive, non-transferable, worldwide, *internal use* license to access and use the Licensed Content (defined below) for the sole purpose of the ordering activity developing its information technology infrastructure and architecture. "Licensed Content" includes all current and any future deliverables Burton Group delivers within the Coverage Area(s) ordered, including the Burton Group Reference Architecture, Market Landscape documents, Technology & Standards documents, Product Profiles, Methodologies and Best Practices (MBP) documents, all TeleBriefings, and Analyst Dialogues within the selected Coverage Area(s), Catalyst Conference tickets, and the Executive described above. The Licensed Content is delivered "as is" and Burton Group makes no warranties regarding the accuracy, completeness or suitability of the licensed content for any particular purpose. "Internal use" means that access and use of the Licensed Content is limited to individuals who are employees, consultants, or subcontractors of the ordering activity and whose access and use of the Licensed Content falls within the purpose stated above.

The Licensed Content is the proprietary information of Burton Group and Burton Group will retain all ownership rights to the Licensed Content, including, but not limited to, all copyrights, patents, or trade secrets. The ordering activity will not disclose the Licensed Content or any portion thereof to any third party without the prior written consent of Burton Group.

## 6.4 Pricing

Burton Group’s pricing for Gartner Research is based on the size of the ordering activity, determined by the number of employees of the specific ordering activity. Each License is sold on a fixed price basis (excluding taxes and any travel related expenses), with the full License fee invoiced and due upon Burton Group’s acceptance of an Order. Delivery is complete upon Burton Group providing the ordering activity with access to the Licensed Content. Burton Group offers a choice in its Gartner Research of Burton Group IT1 or any individual or combination of Coverage Areas.

### 6.4.1 Burton Group IT1

Includes all Coverage Areas offered by Burton Group, as well as all new infrastructure coverage areas that Burton Group launches during the license term, Enterprise Architecture (“EA”) and Cloud Computing, Research Assistant Program, and one-half day on-site dialogue per license term.

#### Coverage Areas

- Application Platform Strategies (“APS”)

Collaboration and Content Strategies (“CCS”)

Data Center Strategies (“DCS”)

Data Management Strategies (“DMS”)

Identity and Privacy Strategies (“IdPS”)

Network and Telecom Strategies (“NTS”)

Security and Risk Management Strategies (“SRMS”)

All Gartner Research include unlimited Analyst Dialogues.

**Table 20. Burton Group IT1 Pricing**

Number of Client Employees	Burton IT1 Annual License Fee	Number of Catalyst Tickets Included
0–1,000	\$65,560	4 tickets
1,000–25,000	\$127,600	8 tickets
25,000–50,000	\$139,480	10 tickets
50,000–75,000	\$154,440	10 tickets
75,000+	\$195,800	12 tickets

**Note:** Ordering Activities (Buying Agency) may choose to enter into a License covering two or more years. In consideration for such multi-year commitment, when the Ordering Activity pays for a two-year License at the time Burton Group accepts the order, the Ordering Activity will receive a ten (10) percent discount on the total of the combined fees. When the Ordering Activity pays for a three-year License at the time Burton Group accepts the order, the client will receive a fifteen (15) percent discount on the total of the combined fees.

#### Travel Expenses and Costs

Pricing for Gartner Research excludes travel related expenses, and sales and use taxes (if applicable). Reasonable and actual travel-related expenses incurred by Burton Group

Consultants or Analysts in the course of delivering on-site dialogues are in addition to the proposed pricing and will be invoiced separately as allowable expenses.

## **6.5 Consulting Services**

Burton Group Senior-level Consultants help clients solve complex enterprise information technology (IT) problems, enabling clients to complete projects on-target, on time, and within budget. Burton Group consultants leverage in house research, best practices data, reference architecture methodology, and vast industry experience to meet and exceed the client's expectations.

Burton Group offers a range of packaged or custom consulting services. Short- or long-term consulting engagements may include any or all of the following:

- Architecture development
- Technology strategy development
- Requirements development
- Business-case development, review, and justification
- Request for Information (RFI)/Request for Proposal (RFP) development and evaluation
- Implementation planning and design
- Vendor evaluation, review, and assessment
- Schema design

### **6.5.1 *Gartner Burton Consultant Advisory Services***

Pricing: Not to Exceed \$4,050 per consultant per day.

**Note:** Pricing is for a Burton Group Senior Executive. If NYS requirements for customized research and analysis can be met with a Research Director or Senior Consultant level staff member than the rate will be less per consultant per day.

### **6.5.2 *Workshop Pricing***

- Two-day Workshop—\$17,600.00
- Three-day Workshop—\$22,000.00

### **6.5.3 *Travel Expenses and Costs***

Prices for Consulting Services exclude travel related expenses, and sales and use taxes (if applicable). Reasonable and actual travel-related expenses incurred by Burton Group Consultants or Analysts in the course of delivering the services are in addition to the proposed pricing and will be invoiced separately as allowable expenses.

## 7.0 Best Practices Councils

Best Practices Councils are role-based communities that provide a foundation for peer exchange and networking and that focus on helping Clients to learn from the real-world experiences of other Members and from Gartner Analysts.

### 7.1 Deliverables

- **Member Forums**—Members-only meetings held three (3) times per year for one and one-half (1.5) days provide a venue for networking and peer exchange.
- **Annual Strategic Forum** (held in conjunction with one (1) Best Practices Council forum)—annual cross-Council event includes outside speakers, member presentations and industry leader discussions.
- **Quarterly Special Interest Groups**—Address critical topics outside of regularly scheduled forum meetings and are available to Members and their extended teams. Facilitated by Best Practices Council Directors via Webinar.
- **Private Member Portal**—A Members-only Web portal provides access to all Best Practices Council content, Member directories, discussion threads and polls.
- **Unique Best Practices Council Content**—Members receive case studies and findings that address real working practices focused on the issues most critical to their roles. Illustrated with case studies, tools and templates provided by fellow Best Practices Council Members and supported by Gartner Research.
- **Designated Delegate**—A Member may identify a “Designated Delegate” from within the Client organization to receive Best Practices Council privileges for the purpose of supporting the Member on a daily basis. The Designated Delegate may attend one (1) Best Practices Council meeting and may access portal content.
- **Aligned Gartner Analyst**—Participates in Council forums and acts as an advisor to the Council. The Analyst’s presence at a Council meeting might change or be supplemented by a Gartner Subject Matter Expert.
- **Dedicated Council Director**—Each Best Practices Council has a dedicated council director (“Council Director”) whose primary role is as a facilitator and relationship manager to the Members. Council Directors ensure that Members receive ongoing value from their council membership as well as help to leverage peer exchange and networking requirements.
- **Pass to Symposium/ITxpo® or Summit Event**—Members receive complimentary admission to the event that is most closely aligned to their role. The event entitlement is a non-transferable, non-refundable “Pass.” The Pass provides additional context and content for issues discussed at Council Forums.

**Note:** All Council events are available to the Member and are not transferable.

You must be a Licensed User to access Gartner Research or Analyst Inquiry. Unless otherwise provided above, (1) passwords, Research documents and Analyst Inquiry may not be shared with non-Users; and (2) the use of this Service is governed by the Usage Guidelines for Gartner Services, which are accessible on the Policies section of gartner.com. Gartner monitors client usage patterns. Unusual or excessive usage patterns may be audited in accordance with the Usage terms herein. Services are to be used for each User’s individual business purposes for the benefit of Client. Gartner periodically updates Service names and deliverables to reflect client needs and market relevancy.

**Table 21. Best Practices Councils Pricing**

Description	Category	Single Member Price	Multi-Member Price
Best Practices Council for Architect and Planning Executives *	BPCAP*	\$26,510	\$25,000
Best Practices Council for Information Security Executives	BPCIS	\$26,510	\$25,000
Best Practices Council for Emerging Technology Management Executives	BPCET	\$25,740	\$24,740
Best Practices Council for IT Sourcing Management Executives *	BPCSM*	\$25,740	\$24,740
Best Practices Council for Enterprise Applications—SAP Executives	BPCSP	\$25,740	\$24,740
Best Practices Council for Infrastructure Executives*	BPCIN*	\$25,740	\$24,740

**Notes:**

- Best Practice Councils contribute (“count”) toward multi user price levels on other Gartner Product offerings within the same agency and services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
- All other Gartner product offerings within same agency, excluding add-on services, contribute (“count”) toward multi user/member pricing for Best Practice Councils.
- All Best Practices Councils Memberships commence on the first of the calendar month.
- Pricing is for Annual Membership

**Note:** \* **Renewal Only**; no longer available for new orders: Effective June 1, 2009 through June 30, 2010, these Councils are only available for renewal of existing memberships.

**Any questions regarding this Revised Net Price List should be addressed to:**

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