

**Group 73001 Award 22601  
Contract: PS66085**

**May 1, 2013**

**Prices for Gartner Information Advisory Services for New  
York State**

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## Guidelines for Gartner Services

1. **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.
1. **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.
2. **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.

## **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.

### ***Variety of Services***

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

### ***Levels of Service***

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

## 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 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**

1. **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.
2. **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.
3. **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.
4. **Teleconferences** — Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors to discuss the topics of their Research Reports.
5. **Access** to Gartner Core Research.
6. **Access** to Gartner for IT Leaders content and role pages.
7. **Talking Technologies Series** — Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on [www.gartner.com](http://www.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:

1. **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.
2. **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.
3. **Contextualized Targeted Gartner Research** — On an as-needed basis, the Delivery Team will email 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:

1. **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:
2. **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

1. **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 [www.gartner.com](http://www.gartner.com).
2. **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

1. **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.
2. **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**

1. **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.
2. **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 [www.gartner.com](http://www.gartner.com).

**Table 1. Gartner for IT Executives: CIO Signature Pricing**

Description	Single Member Price	Multi-Member Price
IT Executives: CIO Signature	\$83,010	\$83,010

Note:

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

## 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.

### ***Deliverables***

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

#### ■ **Content**

1. **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.
2. **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.
3. **Teleconferences** — Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors to discuss the topics of their Research Reports.
4. **Access** to Gartner Core Research.
5. **Access** to Gartner for IT Leaders content and role pages.
6. **Talking Technologies Series** — Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on [www.gartner.com](http://www.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:

1. **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.
2. **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:
  - 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.
3. **Contextualized Targeted Gartner Research** — On an as-needed basis, the Executive Client Manager will email to the Member selected Research which has been synthesized and put into the Member’s context, based on the Member Value Plan.

#### ■ Advisory Services

1. **Gartner for IT Executives Analyst Inquiry** — Provides the Member 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 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.
  - 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 [www.gartner.com](http://www.gartner.com).
2. **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**

1. **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.
2. **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**

1. **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.
2. **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 [www.gartner.com](http://www.gartner.com).

**Table 2. Gartner for IT Executives: CIO Pricing**

Description	Single Member Price	Multi-Member Price
IT Executives: CIO	\$75,070	\$66,630

Note:

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

## 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.

### *Deliverables*

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

#### ■ **Content**

1. **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.
2. **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.
3. **Teleconferences** — Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors to discuss the topics of their Research Reports.
4. **Access** to Gartner Core Research.
5. **Access** to Gartner for IT Leaders content and role pages.
6. **Talking Technologies Series** — Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on [www.gartner.com](http://www.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:

1. **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.

2. **Summarized Targeted Gartner Research** — On an as-needed basis, Delivery Team will email 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**

1. **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:
  - a. 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.
  - 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 [www.gartner.com](http://www.gartner.com).
2. **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**

1. **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.
2. **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**

1. **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.
2. **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 [www.gartner.com](http://www.gartner.com).

**Table 3. Gartner for IT Executives: CIO Essentials Pricing**

<b>Description</b>	<b>Single Member Price</b>	<b>Multi-Member Price</b>
IT Executives: CIO Essentials	\$50,200	\$44,910

Note:

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

## 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.

### **Deliverables**

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

#### ■ **Content\***

1. **Executive Programs Research Reports** — Up to 12 (twelve) Reports per year, covering topics selected by Gartner that address where business and IT intersect.
2. **Teleconferences** — Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors to discuss the topic of their Research Report.
3. **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**

1. **Gartner for Leadership Development Learning Modules**
2. **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 [www.gartner.com](http://www.gartner.com).

**Table 4. Gartner for Leadership Development: Pricing**

Description	Price
Standard Pricing (annual membership for one Member)	\$19,240

Note:

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

## **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.

### ***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.

### **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 email 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 [www.gartner.com](http://www.gartner.com).

## 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.

### ***Deliverables***

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

#### ■ **Content**

1. **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.
2. **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.
3. **Teleconferences** — Up to 12 (twelve) teleconferences per year, hosted by Executive Programs Research Report Authors, to discuss the topics of their Research Reports.
4. **Access** to Gartner Core Research.
5. **Access** to Gartner for IT Leaders content and role pages.
6. **Talking Technologies Series** — Concise and expert commentaries on the latest IT topics in a monthly audio program that can be listened to on [www.gartner.com](http://www.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 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:

1. **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.
2. **Contextualized Targeted Gartner Research** — On an as-needed basis, the Executive Client Manager will email to the Member selected Research which has been synthesized and put into the Member’s context, based on the Member Value Plan.

## ■ Advisory Services

1. **Gartner for IT Executives Analyst Inquiry** — Provides 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 [www.gartner.com](http://www.gartner.com).
2. **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<sup>®</sup>** — One (1) complimentary invitation for attendance to Gartner Symposium/ITxpo<sup>®</sup>, 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 [www.gartner.com](http://www.gartner.com).

**Table 5. Gartner Add-ons: Pricing**

Description	Single Member Price	Multi-Member Price
CIO Signature Delegate Add-on	\$35,240	n/a
Meeting Add-on	\$13,160	n/a

Note:

- Limited availability — contact your Gartner Account Executive.
  - 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.
  - 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.
- Multi-member pricing for Add-on memberships is not available.
- “Add-on” Gartner product memberships do not contribute (“count”) toward multi user price levels on other Gartner Product offerings within the same agency.
- Pricing is for an annual membership.

## 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 six primary Research products:

- Gartner for Enterprise IT Leaders
- Gartner for IT Leaders
- Gartner for Technical Professionals
- Core Research
- Industry Advisory Services
- Strategic Advisory Services

## 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.

### *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.

1. **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.
2. **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.
3. **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.
4. **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.
5. **Facilitated Peer Networking** — “As needed” interactions among members, facilitated by a Service Delivery associate.

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

1. **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.
2. **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.

3. **Exclusive Member Portal** — This Members-only Web portal, accessed through [www.gartner.com](http://www.gartner.com), provides access to exclusive Research, Member-contributed presentations, and tools.
4. **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.
5. **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.)
6. **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**

1. **Customizable Home Page** — [www.gartner.com](http://www.gartner.com) Web pages that can be personalized to serve as gateways to published content and other resources to meet specific needs.
2. **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.
3. **Access to Gartner Core Research** — Research accessible through [www.gartner.com](http://www.gartner.com), which covers a broad range of technology topics and provides a base of knowledge for all technology leaders.
4. **Access to Gartner Benchmarking Analytics IT Key Metrics Data** — Accessible through [www.gartner.com](http://www.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.
5. **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 the Gartner for IT Leaders Advisor deliverables listed 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 Client. Participation in Standard Analyst Inquiry is subject to the following terms:
  1. 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.
  2. 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).
  3. Analyst Inquiry sessions may take up to 30 (thirty) minutes of an Analyst's time.
  4. 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 [www.gartner.com](http://www.gartner.com).

## 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.

### **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.

1. **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.
2. **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.
3. **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.
4. **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.
5. **Facilitated Peer Networking** — “As needed” interactions among Members, facilitated by the Leadership Partner or Client Manager.

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

1. **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.
2. **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.

3. **Exclusive Member Portal** — This Members-only Web portal, accessed through [www.gartner.com](http://www.gartner.com), provides access to exclusive Research, Member-contributed presentations, and tools.
  4. **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.
  5. **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.
  6. **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:**
    1. **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.
    2. **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.
    3. **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.

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 [www.gartner.com](http://www.gartner.com).

**Table 6. Gartner for Enterprise IT Leaders: Pricing**  
**Gartner for Enterprise Supply Chain Leaders: Pricing\***

\* This product has limited availability. Please check with Sales representative before purchasing.

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>	\$55,550	\$46,200
<b>Gartner for Enterprise Supply Chain Leaders:</b> <ul style="list-style-type: none"> <li>■ Supply Chain Leaders</li> </ul>	\$55,550	\$46,200

Note:

- 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.
- 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.
- All EITL and ESCL memberships require an annual contract.
- All EITL and ESCL memberships commence on the first day of the calendar month.
- Pricing is for an annual membership.

## Gartner for IT Leaders

Gartner for IT Leaders is a service that provides client (“Licensed 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 three levels of named User access to Gartner for IT Leaders: Reference, Advisor and Advisor Workgroup.

- Role-based Offerings:
  - 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

## ***Deliverables***

### *Reference Users*

- **Access to all Gartner for IT Leaders Role-Based Web pages** — Exclusive [www.gartner.com](http://www.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 [www.gartner.com](http://www.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 [www.gartner.com](http://www.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:
  1. **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.
  2. **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.
  3. **Published Research** — Reports that focus on companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
  4. **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.

## ***Deliverables***

### ***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:
  1. 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.
  2. 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).
  3. Analyst Inquiry sessions may take up to 30 (thirty) minutes of an Analyst’s time.
  4. 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.
  5. 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 [www.gartner.com](http://www.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: Unless otherwise stated above, use of this Service is governed by the Usage Guidelines for Gartner Services which are accessible on the Policies section of [www.gartner.com](http://www.gartner.com). 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.

## 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.

### *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:
  1. **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.
  2. **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.
  3. **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.

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 [www.gartner.com](http://www.gartner.com).

## Deliverables

### 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:
  1. **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.
  2. **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.
  3. **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.

Note: AMR is a wholly owned subsidiary of Gartner, Inc. 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 [www.gartner.com](http://www.gartner.com).

**Table 7. Gartner for IT Leaders: Pricing  
Gartner for Supply Chain Leaders: Pricing \***

\* This product has limited availability. Please check with Sales representative before purchasing.

# of Users	Reference	Advisor
Single User (per User)	\$21,030	\$31,240
Multi User (per User)	\$13,400	\$23,600

Note:

- IT Leaders and Supply Chain Leaders contribute ("count") toward multi user price levels on other Gartner Product offerings within the same agency; services must be ordered on the same Purchase Order and reflect a common "Bill To" address.
- All other Gartner product offerings within the same agency, excluding add-on services, contribute ("count") toward multi user/member pricing for IT Leaders and Supply Chain Leaders.
- All Gartner for IT Leaders and Supply Chain Leaders memberships require an annual contract.

- All Gartner for IT Leaders and Supply Chain Leaders memberships commence on the first day of the calendar month.
- Pricing is for Annual Membership.

## **Gartner Leaders Workgroups**

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

The Service enables the Leader Member or Workgroup Advisor 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 Advisor.

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

Gartner for Enterprise IT Leaders Workgroups (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.
- **Gartner for Enterprise IT Leaders Workgroup Cross Function Member Deliverables**
  1. All the **Gartner for Enterprise IT Leaders** deliverables, with the exception of “Member Servicing,” “Peer Community Events and Content” and “Summit Event Ticket.”
  2. **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.
- **Gartner for Enterprise IT Leaders Workgroup Role Member Deliverables**
  1. All the **Gartner for Enterprise IT Leaders** deliverables, with the exception of “Member Servicing,” “Peer Community Events and Content” and “Summit Event Ticket.”
  2. **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.
  3. **Role Selection** — Each Workgroup Role Member must select a single Role Library from a set of eight (8). Role selection may only be changed annually and/or upon renewal of the contract.
- **Gartner for Enterprise IT Leaders Workgroup Essentials Member Deliverables**
  1. All the **Gartner for Enterprise IT Leaders** deliverables, with the exception of “Member Servicing,” “Peer Community Events and Content” and “Summit Event Ticket.”
  2. Each Add-on Member (a) may open an unmetered number of Weekly Picks, News Analysis, and Webinars
  3. **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.

4. **Shared Document Allocation** — Share in a total document allocation equivalent to 20 (twenty) Gartner Research documents times the number of Members in the Workgroup.
5. **Reversals** — Up to 20 (twenty) reversals (to reverse a debit of specific documents) during the subscription term.

■ **Gartner for Enterprise IT Leaders Workgroup Member Deliverables**

1. **Renewal Only:** *effective August 01, 2011, Gartner for Enterprise IT Leaders Workgroup is no longer available for purchase; new Workgroup orders from new clients must be of either the Workgroup Essentials, Role or Cross Function variety. Existing Gartner for Enterprise IT Leaders Workgroup clients may continue to renew their existing services through September 30, 2012. All the Gartner for Enterprise IT Leaders deliverables, with the exception of “Member Servicing,” “Peer Community Events and Content” and “Summit Event Ticket.”*
2. **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.
3. **Counter** — A tool to help each Workgroup Member keep track of number of documents opened, reversed, and remaining to be opened.
4. **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 [www.gartner.com](http://www.gartner.com)

## **Gartner for IT Leaders Advisor Workgroup Cross Function Users**

Gartner for IT Leaders Advisor Workgroup Cross Function (the “Service”) is an expanded version of the Gartner for IT Leaders Advisor offering that enables access to Gartner resources in a workgroup environment. The Service provides Advisor-level access to Gartner Research and Analysts related to specific IT roles.

### ***Deliverables***

This Service is accessible by a Gartner for IT Leaders Workgroup Cross Function Advisor (the “Workgroup Cross Function Advisor”) and by his/her direct reports or cross-functional teams (the “Workgroup Cross Function Members”), as identified on the Purchase Order. Collectively, the Workgroup Cross Function Advisor and his/her Workgroup Cross Function Members are “Licensed Users.”

#### **5. Workgroup Cross Function Advisor Deliverables**

- Gartner Core IT Research
- Cross Function-Specific IT Research
- Benchmarking Analytics: IT Key Metrics Data
- Diagnostic Tools, Templates, and Case Studies
- Selected Vendor Reports
- Weekly Picks and News Analysis
- Webinars featuring Gartner Analysts
- Peer Networking
- Talking Technology Series
- Analyst Inquiry
- Summit Event Ticket

#### **6. Workgroup Cross Function Member Deliverables**

- All **Workgroup Cross Function Advisor Deliverables** set forth above, with the following exceptions:
  - a. Workgroup Cross Function Members may participate in Analyst Inquiry provided their Workgroup Cross Function Advisor schedules and facilitates the Inquiry session.
  - b. Summit Event Ticket is not included.

Note: The Workgroup Cross Function Advisor (not the Workgroup Cross Function Members) may, on an occasional and infrequent basis, forward copies of individual research documents, not to exceed ten (10) separate documents per Workgroup per contract year, to specific individuals within the Client organization, provided that such forwarding may not be done in a manner that has the intent or effect of avoiding the purchase of additional User licenses.

The Summit Event Ticket provides admission to one (1) Gartner Summit Conference. Tickets are transferable within the Client organization but may not be transferred to another company. The Ticket may not be used for attendance at an AMR Supply Chain or Exchange Event, Burton Catalyst Event, Gartner Seminars or Gartner CIO Leadership Forum.

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 [www.gartner.com](http://www.gartner.com)

## Gartner for IT Leaders Advisor Workgroup Role Users

Gartner for IT Leaders Advisor Workgroup Role (the “Service”) is an expanded version of the Gartner for IT Leaders Advisor offering that enables access to Gartner resources in a workgroup environment. The Service provides access to Gartner Research and Gartner Analysts related to specific IT roles.

### ***Deliverables***

This Service is accessible by a Gartner for IT Leaders Workgroup Role Advisor (the “Workgroup Role Advisor”) and by his/her direct reports or cross-functional teams (the “Workgroup Role Members”), as identified on the Purchase Order. Collectively, the Workgroup Role Advisor and his/her Workgroup Role Members are “Licensed Users.”

#### **1. Workgroup Role Advisor Deliverables**

- Gartner Core IT Research
- Role-Specific IT Research
- Benchmarking Analytics: IT Key Metrics Data
- Diagnostic Tools, Templates, & Case Studies
- Selected Vendor Reports
- Weekly Picks and News Analysis
- Webinars featuring Gartner Analysts
- Peer Networking
- Talking Technology Series
- Analyst Inquiry
- Summit Event Ticket

#### **2. Workgroup Role Member Deliverables**

- All **Workgroup Role Advisor Deliverables** set forth above, with the following exceptions:
  - a. Workgroup Role Members may participate in Analyst Inquiry provided their Workgroup Role Advisor schedules and facilitates the Inquiry session.
  - b. Summit Event Ticket is not included.
- Each Workgroup Role Member (a) may open an unmetered number of Weekly Picks, News Analysis, and Webinars; and (b) is entitled to unmetered access to Gartner Research documents (the “Role Library”) which Gartner has identified as relevant to the specific IT role selected by the Workgroup Role Member.

Note: Each Workgroup Role Member must select a single Role Library from a set of eight (8). Role selection may only be changed annually and/or upon renewal of the contract

The Workgroup Role Advisor (not the Workgroup Role Members) may, on an occasional and infrequent basis, forward copies of individual research documents, not to exceed ten (10) separate documents per Workgroup per contract year, to specific individuals within the Client organization, provided that such forwarding may not be done in a manner that has the intent or effect of avoiding the purchase of additional User licenses.

The Summit Event Ticket provides admission to one (1) Gartner Summit Conference. Tickets are transferable within the Client organization but may not be transferred to another company. The Ticket may not be used for attendance at an AMR Supply Chain or Exchange Event, Burton Catalyst Event, Gartner Seminars or Gartner CIO Leadership Forum.

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 [www.gartner.com](http://www.gartner.com)

## Gartner for IT Leaders Advisor Workgroup Essentials Users

Gartner for IT Leaders Advisor Workgroup Essentials (the “Service”) is an expanded version of the Gartner for IT Leaders Advisor offering that enables access to Gartner resources in a workgroup environment. The Service provides access to Gartner Research and Gartner Analysts related to specific IT roles.

### **Deliverables**

This Service is accessible by a Gartner for IT Leaders Workgroup Essentials Advisor (the “Workgroup Essentials Advisor”) and by his/her direct reports or cross-functional teams (the “Workgroup Essentials Members”), as identified on the Purchase Order. Collectively, the Workgroup Essentials Advisor and his/her Workgroup Essentials Members are “Licensed Users.”

#### 1. **Workgroup Essentials Advisor Deliverables**

- Gartner Core IT Research
- Role-Specific IT Research
- Benchmarking Analytics: IT Key Metrics Data
- Diagnostic Tools, Templates & Case Studies
- Selected Vendor Reports
- Weekly Picks and News Analysis
- Webinars featuring Gartner Analysts
- Peer Networking
- Talking Technology Series
- Analyst Inquiry
- Summit Event Ticket

#### 2. **Workgroup Essentials Member Deliverables**

- **All Workgroup Essentials Advisor Deliverables** set forth above, with the following exceptions:
  - a. Workgroup Essentials Members may participate in Analyst Inquiry provided their Workgroup Essentials Advisor schedules and facilitates the Inquiry session.
  - b. Summit Event Ticket is not included.

Each Workgroup Essentials Member (a) may open an unmetered number of Weekly Picks, News Analysis, and Webinars; and (b) is entitled to access the Gartner Research documents listed in the first column above, as follows:

- **Shared Document Allocation** — Share in a total document allocation equivalent to 20 (twenty) Gartner Research documents times the number of Members in the Workgroup.
- **Reversals** — Up to 20 (twenty) reversals (to reverse a debit of specific documents) during the subscription term.

Note: The Workgroup Essentials Advisor (not the Workgroup Essentials Members) may, on an occasional and infrequent basis, forward copies of individual research documents, not to exceed ten (10) separate documents per Workgroup per contract year, to specific individuals within the Client organization, provided that such forwarding may not be done in a manner that has the intent or effect of avoiding the purchase of additional User licenses.

The Summit Event Ticket provides admission to one (1) Gartner Summit Conference. Tickets are transferable within the Client organization but may not be transferred to another company. The Ticket may not be used for attendance at an AMR Supply Chain or Exchange Event, Burton Catalyst Event, Gartner Seminars, or Gartner CIO Leadership Forum.

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 [www.gartner.com](http://www.gartner.com)

## **Gartner for IT Leaders Advisor Workgroup Users — Renewal Only**

**Renewal Only:** *effective August 01, 2011, Gartner for IT Leaders Advisor Workgroup is no longer available for purchase. Existing Gartner IT Leaders Advisor Workgroup clients may continue to renew their existing services through September 30, 2012.*

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.

The Workgroup Advisor will have access to the following deliverables:

- **My Gartner Home Page** — Component-based home page that can be customized to meet each client’s individual needs and priorities. My Gartner gives clients the flexibility to organize their Gartner home page to align with how they work and what they are working on.
- **Gartner Business Wizard** — interactive tool which gathers input from clients on their key initiatives, strategic vendor relationships, and other relevant areas — including important milestones — and then uses proprietary technology to deliver personalized recommendations in the form of research, peers, and analysts
- **Gartner Core Research** — Research accessible through [www.gartner.com](http://www.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:

1. 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.
  2. 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).
  3. Analyst Inquiry sessions may take up to 30 (thirty) minutes of an Analyst's time.
  4. 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 [www.gartner.com](http://www.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

The Workgroup Members will have access to the following deliverables:

- All the **IT Leader Workgroup Advisor Deliverables** 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 [www.gartner.com](http://www.gartner.com)

## 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.
- **Gartner for Enterprise Supply Chain Leaders Workgroup Cross Function Member Deliverables**
  1. All the **Gartner for Enterprise Supply Chain Leaders** deliverables, with the exception of “Member Servicing,” “Peer Community Events and Content” and “Supply Chain Event Ticket.”
  2. **Inquiry Participation** — Each Workgroup Member may participate in Analyst Inquiry provided that their Gartner for Enterprise Supply Chain
  3. Leaders Workgroup Advisor schedules and facilitates the Inquiry session.
- **Gartner for Enterprise Supply Chain Leaders Workgroup Essentials Member Deliverables**
  1. All the **Gartner for Enterprise Supply Chain Leaders** deliverables, with the exception of “Member Servicing,” “Peer Community Events and Content” and “Summit Event Ticket.”
  2. Each Add-on Member (a) may open an unmetered number of Monthly Picks, News Analysis, and Webinars
  3. **Inquiry Participation** — Each Workgroup Member may participate in Analyst Inquiry provided that their Gartner for Enterprise Supply Chain Leaders Workgroup Advisor schedules and facilitates the Inquiry session.
- **Workgroup Member Deliverables**
  1. 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.”
  2. **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.

3. **Counter** — A tool to help each Workgroup Member keep track of the number of documents opened, reversed, and remaining to be opened.
4. **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 [www.gartner.com](http://www.gartner.com)

**Renewal Only:** *Gartner for Enterprise Supply Chain Leaders Workgroup is no longer available for purchase; new Workgroup orders from new clients must be of either the Workgroup Essentials or Cross Function variety. Existing Gartner for Enterprise Supply Chain Leaders Workgroup clients may continue to renew their existing services through September 30, 2012.*

## 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** — [www.gartner.com](http://www.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 [www.gartner.com](http://www.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:
    - a. **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.
    - b. **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.
    - c. **Published Research** — Reports focusing on companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
    - d. **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.
    - e. **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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## **Gartner for Supply Chain Leaders Advisor Workgroup Cross-Function Users**

Gartner for Supply Chain Leaders Advisor Workgroup Cross Function (the “Service”) is an expanded version of the Gartner for Supply Chain Leaders Advisor offering that enables access to Gartner resources in a workgroup environment. The service provides Advisor-level access to Gartner Research and Analysts related to supply chain best practice, organization and technology.

### **DELIVERABLES**

This Service is accessible by the Gartner for Supply Chain Leaders Workgroup Cross Function Advisor (the “Workgroup Advisor”) and by his/her direct reports or cross-functional teams (the “Workgroup Cross-Function Members”), as set forth in the Service Agreement. Collectively, the Workgroup Cross Function Advisor and Workgroup Cross Function Members are “Licensed Users.”

#### **1. Workgroup Cross Function Advisor Deliverables**

- Gartner Supply Chain Research
- Diagnostic Tools, Templates and Case Studies
- Selected Vendor Reports
- Supply Chain Peer Networking
- Webinars featuring Gartner Analysts
- Analyst Inquiry
- Monthly Picks and News Analysis
- Supply Chain Event Ticket
- Tools for Workgroup Collaboration

#### **2. Workgroup Cross Function Member Deliverables**

**All Workgroup Cross Function Advisor Deliverables** set forth above, with the following exceptions:

- a. Workgroup Cross Function Members may participate in Analyst Inquiry provided their Workgroup Cross Function Advisor schedules and facilitates the Inquiry session.
- b. Supply Chain Event Ticket is not included.

Note: The Workgroup Cross Function Advisor (not the Workgroup Cross Function 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 provided that such forwarding may not be done in a manner that has the intent or effect of avoiding the purchase of additional User licenses.

The Supply Chain Event Ticket is valid for one (1) admission to a Gartner Supply Chain Executive Conference. Tickets are valid for 12 (twelve) months from the date of issue which is indicated by the expiration date shown on the front of the Ticket. Tickets provided as part of a Gartner Research offering are valid only for Gartner conferences that take place during the 12-month (twelve-month) contract term of the Research offering for which the Ticket has been issued.

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

Gartner for Supply Chain Leaders Advisor Workgroup Essentials (the “Service”) is an expanded version of the Gartner for Supply Chain Leaders Advisor offering that enables access to Gartner resources in a workgroup environment. The service provides access to Gartner Research and Gartner Analysts related to supply chain best practice, organization and technology.

### ***Deliverables***

This Service is accessible by the Gartner for Supply Chain Leaders Workgroup Essentials Advisor (the “Workgroup Advisor”) and by his/her direct reports or cross-functional teams (the “Workgroup Essentials Members”), as set forth in the Service Agreement. Collectively, the Workgroup Essentials Advisor and Workgroup Essentials Members are “Licensed Users.”

#### **1. Workgroup Essentials Advisor Deliverables**

- Gartner Supply Chain Research
- Diagnostic Tools, Templates, and Case Studies
- Selected Vendor Reports
- Supply Chain Peer Networking
- Webinars featuring Gartner Analysts
- Analyst Inquiry
- Monthly Picks and News Analysis
- Supply Chain Event Ticket
- Tools for Workgroup Collaboration

#### **2. Workgroup Essentials Member Deliverables**

**All of the Workgroup Essentials Advisor Deliverables** set forth above, with the following exceptions:

1. Workgroup Essentials Members may participate in Analyst Inquiry provided their Workgroup Essentials Advisor schedules and facilitates the Inquiry session.
2. Supply Chain Event Ticket is not included.

Each Workgroup Essentials Member (i) may open an unmetered number of News Analysis, Monthly Picks, and Webinars; and (ii) is entitled to access any Gartner Research documents listed in the first column above, as follows:

1. **Shared Document Allocation** — Share in a total document allocation equivalent to 20 (twenty) Gartner Research documents times the number of Members in the Workgroup.
2. **2. Reversals** — Up to twenty (20) reversals (to reverse debit of documents) during the subscription term.

Note: The Workgroup Essentials Advisor (not the Workgroup Cross Function 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 provided that such forwarding may not be done in a manner that has the intent or effect of avoiding the purchase of additional User licenses.

The Supply Chain Event Ticket is valid for one (1) admission to a Gartner Supply Chain Executive Conference. Tickets are valid for 12 (twelve) months from the date of issue which is indicated by the expiration date shown on the front of the Ticket. Tickets provided as part of a Gartner Research offering are valid only for Gartner conferences that take place during the 12-month (twelve-month) contract term of the Research offering for which the Ticket has been issued.

## **Gartner for Supply Chain Leaders Advisor Workgroup Users — Renewal Only**

**Renewal Only:** *Gartner for Supply Chain Leaders Advisor Workgroup is no longer available for purchase. Existing Gartner Supply Chain Leaders Advisor Workgroup clients may continue to renew their existing services through September 30, 2012.*

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** — [www.gartner.com](http://www.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 [www.gartner.com](http://www.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:
    - a. **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.
    - b. **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.
    - c. **Published Research** — Reports focusing on companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
    - d. **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.
    - e. **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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**Table 8. Gartner for Enterprise IT Leaders Workgroup Cross Function: Pricing**  
**Gartner for Enterprise Supply Chain Leaders Workgroup Cross Function: Pricing \***

\* This product has limited availability. Please check with Sales representative before purchasing.

# of Users	Quantity	Price
1 Member and 3 Workgroup Members	1 + 3	\$88,210
1 Member and 4 Workgroup Members	1 + 4	\$102,240
1 Member and 5 Workgroup Members	1 + 5	\$116,260
1 Member and 6 Workgroup Members	1 + 6	\$130,280
1 Member and 7 Workgroup Members	1 + 7	\$144,310
1 Member and 8 Workgroup Members	1 + 8	\$158,330
1 Member and 9 Workgroup Members	1 + 9	\$172,350
1 Member and 10 Workgroup Members	1 + 10	\$186,370

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

# of Users	Quantity	Price
1 Member and 3 Workgroup Members	1 + 3	\$72,260
1 Member and 4 Workgroup Members	1 + 4	\$80,960
1 Member and 5 Workgroup Members	1 + 5	\$89,670
1 Member and 6 Workgroup Members	1 + 6	\$98,370
1 Member and 7 Workgroup Members	1 + 7	\$107,080
1 Member and 8 Workgroup Members	1 + 8	\$115,780
1 Member and 9 Workgroup Members	1 + 9	\$124,490
1 Member and 10 Workgroup Members	1 + 10	\$133,190

**Table 10. Gartner for Enterprise IT Leaders Workgroup Essentials: Pricing**  
**Gartner for Enterprise Supply Chain Leaders Workgroup Essentials: Pricing \***

\* This product has limited availability. Please check with Sales representative before purchasing.

# of Users	Quantity	Price
1 Member and 3 Workgroup Members	1 + 3	\$67,140
1 Member and 4 Workgroup Members	1 + 4	\$74,130
1 Member and 5 Workgroup Members	1 + 5	\$81,120
1 Member and 6 Workgroup Members	1 + 6	\$88,120
1 Member and 7 Workgroup Members	1 + 7	\$95,110
1 Member and 8 Workgroup Members	1 + 8	\$102,110
1 Member and 9 Workgroup Members	1 + 9	\$109,110
1 Member and 10 Workgroup Members	1 + 10	\$116,100

**Table 11. Gartner for Enterprise IT Leaders Workgroup: Pricing — Renewal Only**  
**Gartner for Enterprise Supply Chain Leaders Workgroup: Pricing — Renewal Only \***

\* This product has limited availability. Please check with Sales representative before purchasing.

# of Users	Quantity	Price
1 Member and 3 Workgroup Members	1 + 3	\$62,670
1 Member and 4 Workgroup Members	1 + 4	\$68,170
1 Member and 5 Workgroup Members	1 + 5	\$73,660
1 Member and 6 Workgroup Members	1 + 6	\$79,160
1 Member and 7 Workgroup Members	1 + 7	\$84,650
1 Member and 8 Workgroup Members	1 + 8	\$90,150
1 Member and 9 Workgroup Members	1 + 9	\$95,640
1 Member and 10 Workgroup Members	1 + 10	\$101,150

Note:

**Renewal Only:** effective August 01, 2011, Gartner for Enterprise IT Leaders Workgroup and Gartner for Enterprise Supply Chain Leaders Workgroup are no longer available for purchase by new clients. Existing Workgroup clients may renew their existing services through September 30, 2012.

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

**Table 12. Gartner for IT Leaders Advisor Workgroup Cross Function: Pricing  
Gartner for Supply Chain Leaders Advisor Workgroup Cross Function: Pricing \***

\* This product has limited availability. Please check with Sales representative before purchasing.

# of Users	Quantity	Price
1 Advisor and 3 Workgroup Members	1 + 3	\$65,640
1 Advisor and 4 Workgroup Members	1 + 4	\$79,660
1 Advisor and 5 Workgroup Members	1 + 5	\$93,680
1 Advisor and 6 Workgroup Members	1 + 6	\$107,710
1 Advisor and 7 Workgroup Members	1 + 7	\$121,730
1 Advisor and 8 Workgroup Members	1 + 8	\$135,750
1 Advisor and 9 Workgroup Members	1 + 9	\$149,770
1 Advisor and 10 Workgroup Members	1 + 10	\$163,790

**Table 13. Gartner for IT Leaders Advisor Workgroup Role: Pricing**

# of Users	Quantity	Price
1 Advisor and 3 Workgroup Members	1 + 3	\$49,680
1 Advisor and 4 Workgroup Members	1 + 4	\$58,380
1 Advisor and 5 Workgroup Members	1 + 5	\$67,090
1 Advisor and 6 Workgroup Members	1 + 6	\$75,790
1 Advisor and 7 Workgroup Members	1 + 7	\$84,500
1 Advisor and 8 Workgroup Members	1 + 8	\$93,210
1 Advisor and 9 Workgroup Members	1 + 9	\$101,910
1 Advisor and 10 Workgroup Members	1 + 10	\$110,610

**Table 14. Gartner for IT Leaders Advisor Workgroup Essentials: Pricing  
Gartner for Supply Chain Leaders Advisor Workgroup Essentials: Pricing \***

\* This product has limited availability. Please check with Sales representative before purchasing.

# of Users	Quantity	Price
1 Advisor and 3 Workgroup Members	1 + 3	\$44,550
1 Advisor and 4 Workgroup Members	1 + 4	\$51,550
1 Advisor and 5 Workgroup Members	1 + 5	\$58,540
1 Advisor and 6 Workgroup Members	1 + 6	\$65,540
1 Advisor and 7 Workgroup Members	1 + 7	\$72,540
1 Advisor and 8 Workgroup Members	1 + 8	\$79,530
1 Advisor and 9 Workgroup Members	1 + 9	\$86,530
1 Advisor and 10 Workgroup Members	1 + 10	\$93,520

**Table 15. Gartner for IT Leaders Advisor Workgroup: Pricing — Renewal Only**  
**Gartner for Supply Chain Leaders Advisor Workgroup: Pricing — Renewal Only \***

\* This product has limited availability. Please check with Sales representative before purchasing.

# of Users	Quantity	Price
1 Advisor and 3 Workgroup Members	1 + 3	\$41,040
1 Advisor and 4 Workgroup Members	1 + 4	\$46,540
1 Advisor and 5 Workgroup Members	1 + 5	\$52,040
1 Advisor and 6 Workgroup Members	1 + 6	\$57,540
1 Advisor and 7 Workgroup Members	1 + 7	\$63,030
1 Advisor and 8 Workgroup Members	1 + 8	\$68,530
1 Advisor and 9 Workgroup Members	1 + 9	\$74,010
1 Advisor and 10 Workgroup Members	1 + 10	\$79,510

Note:

**Renewal Only:** effective August 01, 2011, Gartner for IT Leaders Advisor Workgroup and Gartner for Supply Chain Leaders Advisor Workgroup are no longer available for purchase by new clients. Existing Workgroup clients may renew their existing services through September 30, 2012.

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

## Gartner For Technical Professionals Advisor Department

Gartner for Technical Professionals Advisor Department (the “Service”) provides clients who maintain a threshold minimum investment in select Gartner products with access to all Gartner for Technical Professionals Research published through gartner.com and also with the option of scheduling dialogues with Analysts that support the Service.

### **Deliverables**

Client may designate up to forty (40) users (“Licensed Users”) to receive the following Deliverables:

- **Published Research** — Focuses on application platforms, collaboration and content management, data center, data management, identity and privacy, network and telecom, and security and risk management.
- **Reference Architecture** — Web-based tool that assists in making informed strategy and architecture decisions in the technological and organizational environment.
- **Webinars** — Periodic Web conferences where Gartner Analysts speak on timely topics in information technology and then solicit questions from listeners.
- **Gartner Peer Connect** — Provides access to a community of IT professionals who share opinions about technology products and vendors.
- **Analyst Dialogues** — Access to Gartner Analysts associated with the Service purchased by Client. Participation in Analyst Dialogues, the scheduling of which may, at Gartner’s discretion, be facilitated by two (2) client representatives.
- **Event Tickets** — Two (2) tickets to a Catalyst Event. In addition, a Catalyst Ticket may be used to register for a Summit Event. Tickets are valid for 12 (twelve) months from the date of issue which is indicated by the expiration date shown on the front of the Ticket. Tickets provided as part of a Gartner Research offering are valid only for Gartner conferences that take place during the 12-month (twelve-month) contract term of the Research offering for which the Ticket has been issued.
  - ❑ Tickets are transferable within the Client organization but not to another company. A single Ticket may not be used by more than one (1) employee nor for admission to the following Gartner events: Gartner Symposium/ITxpo<sup>®</sup>, Supply Chain Executive Conference, Gartner Seminars, or Gartner CIO Leadership Forum.
  - ❑ Your purchase and use of a Ticket(s) is governed by the online registration terms and conditions at <http://www.gartner.com/technology/about/policies/events-terms.jsp>.

### **Additional Terms & Conditions**

Participation in Analyst Dialogues is subject to the following terms:

1. Licensed Users with Advisor-level access may engage with a Gartner Analyst to: (i) discuss a Gartner for Technical Professionals Research document published within the scope of their specific Service, and/or (ii) apply a Gartner for Technical Professionals Research document to a related issue their company is facing.
2. Participation in Analyst Dialogue is limited to the Licensed User(s) and the Gartner Analyst only (i.e., non-Users, inside or outside client company, may not attend or otherwise participate).

3. Analyst Dialogue sessions may take up to 60 (sixty) minutes of an Analyst's time and may also be used to request basic reviews of technical-related documents of 20 (twenty) pages or less that take up to 60 minutes of an Analyst's time. Examples include technical architecture proposals and technical plans.
4. All Licensed Users that access this Service must be IT staff members who are currently employed by the client organization.

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 Technical Professionals Reference Department

Gartner for Technical Professionals Reference Department (the “Service”) provides clients who maintain a threshold minimum investment in select Gartner products with access to all Gartner for Technical Professionals Research published through gartner.com.

### Deliverables

Client may designate up to forty (40) users (“Licensed Users”) to receive the following Deliverables:

- **Published Research** — Focuses on application platforms, collaboration and content management, data center, data management, identity and privacy, network and telecom, and security and risk management.
- **Reference Architecture** — Web-based tool that assists in making informed strategy and architecture decisions in the technological and organizational environment.
- **Webinars** — Periodic Web conferences where Gartner Analysts speak on timely topics in information technology and then solicit questions from listeners.
- **Gartner Peer Connect** — Provides access to a community of IT professionals who share opinions about technology products and vendors.

### Additional Terms & Conditions

Additional user licenses may be purchased in predefined increments of forty (40).

All Licensed Users that access this Service must be IT staff members who are currently employed by the client organization.

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.

**Table 16. Gartner for Technical Professionals: Pricing**

Description	Advisor Price	Reference Price
Gartner for Technical Professionals IT Staff — Up to 40 Licensed Users	\$90,920.00	\$61,280.00

Notes:

- Gartner for Technical Professionals licenses contribute (“count”) toward multi-user price levels on other Gartner Product offerings within the same agency; services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
- All Gartner for Technical Professionals licenses require an annual contract.
- Licenses commence on the first day of the calendar month.
- Pricing is for Annual license
- All Deliverables are available to the Named Users only.
- Services are to be used for each Named User’s individual business purposes for the benefit of the Client organization.
- Gartner periodically updates Service names and Deliverables to reflect Client needs and market relevance.

## Gartner Technology Planner For Technical Professionals

Gartner Technology Planner for Technical Professionals (the “Service”) provides clients with access to data and tools published through [techplanner.gartner.com](http://techplanner.gartner.com). The Service is available only to technical professionals who already have a license to a Gartner for Technical Professionals product.

### Deliverables

Client may designate up to 40 (forty) users (“Licensed Users”) to receive the following Gartner Deliverables:

- Gartner Technology Planner Portal
- Server Product Information & Comparison Tools
- Server Consolidation Analysis Tool
- Storage Product Information & Comparison Tools
- IT Efficiency Analysis Tool

### Additional Terms & Conditions

Licensed Users may contact Gartner for assistance with Service tools and data.

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).

**Table 17. Gartner Technology Planner for Technical Professionals: Pricing**

Description	Price
Gartner Technology Planner (Add-on to Technology Professionals or Burton Classic IT1) IT Staff- Up to 40 Licensed Users	\$90,920.00

Notes:

- Clients must have purchased Gartner for Technical Professionals or Burton Classic IT1 to be eligible for Gartner Technology Planner.
- “Add-on” Gartner product licenses do not contribute (“count”) toward multi user price levels on other Gartner Product offerings within the same agency.
- All Gartner Technology Planner licenses require an annual contract.
- Licenses commence on the first day of the calendar month.
- Pricing is for Annual license
- All Deliverables are available to the Named Users only.
- Services are to be used for each Named User’s individual business purposes for the benefit of the Client organization.
- Gartner periodically updates Service names and Deliverables to reflect Client needs and market relevance.
- Gartner Technology Planner deliverables include Reference access only. Advisor access is not available within this product offering.

## 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 [www.gartner.com](http://www.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.

### 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:
  1. **Published Research** — Covers companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
  2. **Vendor and Product Ratings** — Provides a holistic view of IT vendors.
  3. **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 [www.gartner.com](http://www.gartner.com).

## 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:
  1. **Published Research** — Covers companies, products, markets, decision frameworks, tactical guidelines, case studies, and strategic planning assumptions.
  2. **Vendor and Product Ratings** — Provides a holistic view of IT vendors.
  3. **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 [www.gartner.com](http://www.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 [www.gartner.com](http://www.gartner.com).

**Table 18. Core Connect Research: Pricing**

# of Users	Reference	Advisor
Single User (per User)	\$18,410	\$28,600
Multi User (per User)	\$10,700	\$21,020

Note:

- Core Connect contributes (“counts”) toward multi user price levels on other Gartner Product offerings within the same agency; services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
- All other Gartner product offerings within the same agency, excluding add-on services, contribute (“count”) toward multi user/member pricing for Core Connect.

- All Memberships commence on the first of the calendar month.
- All Memberships require an annual contract.
- Pricing is for annual Membership.

## **Gartner for IT News and Insight®**

For each Research purchase order over \$100k, at client's request, Gartner will provide at no charge, ten (10) licenses to Gartner for IT News and Insight®.

IT News and Insight from Gartner® (the "Service") provides clients with self-service online access to essential IT news and selected role-based Gartner Research.

### ***Deliverables***

IT News and Insight from Gartner is a portal-based product. Each user designated by the Client ("Licensed User") receives the following Deliverables:

- **Weekly Picks IT Research in HTML:** A selection of hand-picked reports (in HTML format updated weekly) that focus on companies, products, markets, decision frameworks, and case studies. Includes access to Gartner First Takes research that addresses the most relevant issues in brief news analysis format.
- **IT News Analysis:** Informed and immediate insight from Gartner on breaking news in IT.
- **Market News:** Frequently updated user-role relevant news aggregated from multiple sources.
- **Webinars featuring Gartner Analysts:** Access to webinars delivered by Gartner Analysts.
- **Events Calendar:** User selected, role-relevant, information on upcoming Gartner Summits where Licensed Users can refresh their skills and learn from peers who face similar challenges.

### ***Additional Terms & Conditions***

Each Licensed User must establish and maintain a current profile on gartner.com. Each Licensed User will be issued a user ID and password, which are for their own personal use and which may not be shared with any other individual or group, either inside or outside of the Client organization.

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.

## Core Research — **Renewal 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.

### 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.

## 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:
  1. 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.
  2. 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).
  3. Analyst Inquiry sessions may take up to 30 minutes of an Analyst's time.
  4. 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.
- **Webinars** — Periodic Web conferences where Gartner analysts speak on timely topics in information technology and then solicit questions from 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. Tickets are transferable within the client organization but may not be transferred to another organization.

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.

**Table 19. 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	\$11,890	\$20,030	\$13,600	\$21,020
2	\$10,700	\$20,030	\$10,700	\$21,020
5	\$10,700	\$20,030	\$10,700	\$21,020
10	\$8,900	\$11,140	\$10,610	\$12,790
25	\$6,230	\$9,500	\$7,910	\$11,150
50	\$5,040	\$8,320	\$6,720	\$9,970

Note:

**Renewal Only:** available for Renewal to existing Core Research clients as of February 1, 2007 or for Conversion to Core Connect Research.

- Aggregate CORE Reference and Advisor Seats at the Agency/Bureau/Operating Unit level only — on a single Purchase Order — to determine price per seat.
- CORE seats contribute (“count”) toward multi-user price level on all other Gartner product offerings within the same agency; services must be ordered on the same Purchase Order and reflect a common “Bill To” address.
- All other Gartner product offerings within the same agency, excluding add-on services, contribute (“count”) toward determining CORE quantity/unit price level.
- All Memberships commence on the first of the calendar month.
- All Memberships require an annual contract
- Pricing is for annual Membership.
- Effective February 1, 2007, the above pricing structure is no longer available to new clients.
- 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.
- 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.

## Gartner Consulting

Gartner Consulting is the leading consultancy at the nexus of technology and business, helping clients define key strategies, manage major technology initiatives, optimize operations and achieve high returns on their IT investments. Our experienced practitioners apply rigorous methodologies, critical thinking, deep analytics, and knowledge management to solve your most pressing issues and deliver maximum business value.

Our solutions address the breadth of your business needs from defining key strategies to achieve business objectives, developing enterprise plans to manage IT risk, and managing your most critical initiatives. We work with you through all stages of the project life cycle to help solve your greatest challenges. We help you make critical decisions on your IT direction, define the initiatives and road map to achieve that direction, and work with you to ensure these key initiatives are delivered successfully.

According to a client satisfaction survey recently conducted by an independent third party, clients select Gartner Consulting for the following reasons:

- Gartner Consulting has the base of knowledge to address their technical and strategy issues as evidenced by our continuous services, research databases, benchmarking databases, conferences and word-of-mouth references.
- Gartner Consulting is seen as a better alternative to the larger consulting firms due to the quality of staff assigned to projects, specificity of results, faster completion times, cost and objectivity (no downstream implementation services).
- The value and credibility of the Gartner name in association with the information, recommendations and strategies submitted to senior management is enormous.

Specifically, Gartner Consulting provides:

- A focus on long-term planning and technical architectures.
- A unique and robust methodology. Our methodology indicates an understanding of the requirements of a long-term plan and presents a road map for attaining a client's goal. In addition, our use of a standard model for architecture development reduces the risk of architectural oversight or project delays.
- A team whose members are balanced among: (1) management and technical consulting, (2) information technology assessment, (3) strategic analysis, (4) market planning and (5) primary research.
- Nationally known professionals in the key technical areas required for the project. Gartner professionals are highly respected in the industry and provide proven expertise.

**Table 20. IT Professional Services Rates**

<b>Title</b>	<b>Regular Hourly Rates</b>	<b>* Temporary Discounted Hourly Rates Applicable to Orders Dated On or Before 12/31/2013</b>	<b>* Temporary Daily Rates</b>
Vice President	\$583.00	\$495.00	\$3,960.00
Senior Director	\$543.00	\$456.00	\$3,640.00
Director	\$489.00	\$425.00	\$3,400.00
Associate Director	\$420.00	\$360.00	\$2,880.00
Senior Consultant	\$336.00	\$290.00	\$2,320.00
Consultant	\$247.00	\$210.00	\$1,680.00
Associate Consultant	\$173.00	\$150.00	\$1,200.00

## Gartner Consulting — Scope

Gartner's Scope of Work is defined broadly by the following strategic and high-value activities:

### ■ **Benchmarking Solutions**

Benchmarking solutions use state-of-the-art tools and high-quality data from the world's largest database of IT performance metrics to compare all or some of your IT functions to similar organizations. No two solutions are the same. Gartner's approach and all of our engagements are highly customized to deliver results that meet an individual client's specific business needs.

### ■ **Critical Program Management Support**

Gartner can assist a client to successfully deliver their most critical initiatives by applying the rigor and discipline of strong and independent program management practices that identify and manage risks, schedule and costs of the critical IT programs within an organization. Gartner will assist the client to implement a Program Management Office to execute the processes required to assess and monitor progress to keep these initiatives on track.

### ■ **Performance Optimization**

Gartner will provide analysis and recommendations to optimize the effectiveness, efficiency and quality of the IT services that you deliver. Gartner may assist the client in developing appropriate service levels and performance management processes and may provide strategies for the client's IT processes to improve efficiencies, service and costs.

### ■ **Risk Management**

Gartner can provide the client with strategies to effectively manage risk across the organization by supporting the development of comprehensive plans for business continuity/disaster recovery, for protecting critical information assets and to ensure compliance with regulatory requirements and guidelines.

### ■ **Sourcing Execution and Management**

Gartner can assist a client in making key sourcing decisions that support the organization's business objectives. Gartner will support the selection of key service providers in addition to providing oversight of existing service provider contracts and can provide recommendations for ongoing improvements.

### ■ **Strategy and Architecture**

Gartner can support an organization in the alignment of its strategic IT direction with its business strategy. Gartner can help the organization make key technology choices, design an efficient and effective organization and list of processes, establish an effective governance model and strengthen IT management processes to effectively manage the client's critical IT investments and priorities.

## Positions and Descriptions

### ***Commercial Job Title: Vice President***

#### Position Summary

Responsible for the sales, management and execution of consulting projects in a portfolio of client accounts.

#### Position Accountabilities and Specific Duties

- Act as primary contact with client executives; plan and facilitate critical meetings
- Support clients in defining agenda and/or corporate strategy
- Develop account plans and take responsibility for the development and growth of strategic client accounts
- Develop overall administrative, financial and time commitments for multiple engagements; set overall goals and drive agendas to ensure goals are met
- Manage multiple engagements and provide mentoring and guidance to project managers and team members
- Perform engagement quality reviews and drive continuous improvement efforts
- Act as a subject matter expert on engagements
- Serve as a sounding board for engagement team's strategic direction
- Provide executive leadership on sales calls and oversee multiple proposal development efforts

#### Position Specifications

A. Education:

- Masters Degree and at least ten (10) years of experience working as a consultant or leader in the information technology industry; or,
- Bachelors Degree and at least twelve (12) years of experience working as a consultant or leader in the information technology industry

B. Demonstrated experience:

- Leading and consulting on large business process/technology transformation programs
- Managing business unit/segment
- Advising Technology Clients
- Delivering improvements and cost savings
- Recruiting, developing and managing teams
- Delivering value to customers

C. Required Technical/Functional Knowledge and Skills:

- Extensive technology knowledge in area/s of expertise (SME)
- Business/technology strategist
- Industry insight
- Understanding of marketing, finance and general business acumen
- Project/Program management
- Leadership/Management
- Excellent written, verbal and presentation skills.

## Commercial Job Title: Senior Director

### Position Summary

Responsible for the sales, management and execution of consulting projects, including the timely presentation of quality deliverables.

### Position Accountabilities and Specific Duties

- Drive client thinking and act as thought leader
- Support client partners in defining client agenda and/or corporate strategy
- Manage multiple engagements and provide mentoring and guidance to project managers and team members
- Act as a subject matter expert on engagements
- Perform engagement quality reviews and drive continuous improvement efforts
- Plan and facilitate significant meetings with client executives
- Develop overall administrative, financial and time commitments for multiple projects and set overall goals for each
- Ensure effective and creative idea generation among team members
- Conduct primary research including market surveys of customers, vendors, lines of business and users, as well as secondary research.
- Analyze findings, develop insights and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations

### Position Specifications

#### A. Education:

- Minimum Qualifications: Masters Degree and at least 10 years of experience working as a consultant or leader in the information technology industry; or,
- Substitute Qualifications: Bachelors Degree and at least 12 years of experience working as a consultant or leader in the information technology industry

#### B. Demonstrated experience:

- Leading and consulting on large business process/technology projects/programs
- Advising technology/business clients
- Delivering improvements and cost savings
- Recruiting, developing and managing teams
- Developing consensus
- Delivering value to customers

#### C. Required Technical/Functional Knowledge and Skills:

- Extensive technology/business process knowledge in area/s of expertise (SME)
- Developing business/technology strategy capabilities
- Understanding of marketing, finance and general business acumen
- Industry insight
- Project/Program management
- Leadership/Management
- Team building
- Excellent written, verbal and presentation skills.

## **Commercial Job Title: Director**

### Position Summary

Responsible for the sales, management and execution of consulting projects including the timely presentation of quality deliverables.

### Position Accountabilities and Specific Duties

- Drive client thinking and act as thought leader
- Support client partner in defining client agenda and/or corporate strategy
- Plan and facilitate significant meetings with client executives
- Develop overall administrative, financial and time commitments for multiple projects and set overall goals for each
- Ensure effective and creative idea generation among team members
- Conduct primary research including market surveys of vendors and users as well as secondary research.
- Analyze findings, develop insights and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations
- Prepare engagement review forms and provide coaching and mentoring for team members
- Identify and pursue sales opportunities and leads which may come from meetings, clients, other consultants, the sales force, vendors and others.
- Support and assist the sales organization by making joint sales calls.
- Contribute to account plan development and proactively follow up on all assigned leads
- Write and present proposals to prospective clients and contracts for engagements.

### Position Specifications

#### A. Education:

- Masters Degree and at least eight (8) years of experience working as a consultant or leader in the information technology industry; or,
- Bachelors Degree and at least ten (10) years of experience working as a consultant or leader in the information technology industry

#### B. Demonstrated experience:

- Leading or Consulting on large business process/technology projects/programs
- Delivering improvements and cost savings
- Recruiting, developing and managing teams
- Developing consensus
- Delivering value to customers

#### C. Required Technical/Functional Knowledge and Skills:

- Extensive technology knowledge in area/s of expertise (SME)
- Understanding of marketing, finance and general business acumen
- Industry insight
- Project/Program management
- Leadership/Management
- Team building
- Excellent written, verbal and presentation skills.

## **Commercial Job Title: Associate Director**

### Position Summary

Responsible for the management and execution consulting projects including the timely presentation of quality deliverables. May have minimal level of sales responsibilities

### Position Accountabilities and Specific Duties

- Plan and facilitate meetings with client project management
- Meet with client and develop project questions, gain understanding of the client's environment and assure that recommendations can be implemented.
- Manage small to medium teams by developing work plans and managing project execution timelines.
- Prepare engagement review forms for team members
- As an independent contributor, complete sections of significant customized consulting assignments covering a variety of subject areas including specific technologies and products, markets and market trends, competitor analysis, financial impact, etc.
- Act as project point person both internally and externally
- Lead the team's analytical thinking and structure for an assignment
- Conduct primary research including market surveys of vendors and users as well as secondary research.
- Analyze findings, develop insights and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations
- Develop and submit content for proposals
- Support development of work plan estimates and resource/staff plans
- Recognize and report new business opportunities; collaborate with sales partners and subject matter experts to pursue and close opportunities

### Position Specifications

#### A. Education:

- Masters Degree and at least six (6) years of experience working in the information technology industry; or,
- Bachelors Degree and at least eight (8) years of experience working in the information technology industry

#### B. Demonstrated experience:

- Managing/supporting business/technology projects
- Gathering, compiling and analyzing data
- Surveying and statistical analysis
- Developing consensus
- Delivering value to customers

#### C. Required Technical/Functional Knowledge and Skill:.

- Project management
- Solid technology knowledge in area/s of expertise (SME)
- Understanding of marketing, finance and general business acumen
- Ability to analyze problems
- Use judgment effectively
- Excellent written, verbal and presentation skills.

## **Commercial Job Title: Senior Consultant**

### Position Summary

Responsible for the management and execution consulting projects including the timely presentation of quality deliverables.

### Position Accountabilities and Specific Duties

- Participate in client conferences and take part in client communications.
- Complete sections of significant customized consulting assignments covering a variety of subject areas including specific technologies and products, markets and market trends, competitor analysis, financial impact, etc.
- Provide the analytical thinking and structure for an assignment and participate in discussion groups
- Conduct and lead interviews and small meetings for assignment
- Analyze findings, develop insights and prepare reports with client-specific actionable recommendations
- Monitor project execution to timeline and budget
- Develop and submit content for proposals
- Support development of work plan estimates and resource/staff plans
- May serve as project manager for well defined engagements

### Position Specifications

#### A. Education:

- Masters Degree and at least three (3) years of experience working in the information technology industry; or,
- Bachelors Degree and at least five (5) years of experience working in the information technology industry

#### B. Demonstrated experience:

- Supporting business and technology projects
- Gathering, compiling and analyzing data
- Surveying and statistical analysis
- Developing deliverable reports

#### C. Required Technical/Functional Knowledge and Skills:

- Project management
- General information technology knowledge with some subject matter expertise
- Ability to analyze problems
- Use judgment effectively
- Excellent listening and writing skills
- Oral communication skills
- Initiative and Resourcefulness

## **Commercial Job Title: Consultant**

### Position Summary

Responsible for providing quality deliverables and/or analytical project reports for assigned custom consulting engagements.

### Position Accountabilities and Specific Duties

- Provide analytical support to project team
- Conduct research using library facilities, Gartner Analysts, other Gartner resources and primary research.
- Analyze, interpret, extrapolate, project and model data to reach conclusions
- Prepare written reports with text, charts, and spreadsheets for internal presentation and for inclusion in reports for clients.
- Participate in project/initiative planning and support the completion of estimates
- May participate on lead qualification to learn processes and fundamental skills needed for consulting sales process.
- Participate in opening client conference at which the engagement is defined (kick-off meetings) and begin to take lead role for client communications.
- May participate in final conference with client at which final report is delivered.
- As assigned, complete sections of significant customized consulting assignments covering a variety of subject areas including technologies, markets, products, competitive analysis, financial impact, etc.

### Position Specifications

#### A. Education:

- Masters Degree and at least one (1) year of experience working in the information technology industry; or,
- Bachelors Degree and at least two (2) years of experience working in the information technology industry

#### B. Demonstrated experience:

- In the information technology industry
- Developing deliverable reports
- Using spreadsheet software
- Gathering and compiling data

#### C. Required Technical/Functional Knowledge and Skills:

- General Information Technology knowledge
- Ability to make decisions
- Ability to analyze problems
- Use judgment effectively
- Excellent listening and writing skills
- Oral communication skills
- Initiative and Resourcefulness

## **Commercial Job Title: Associate Consultant**

### Position Summary

Responsible for providing quality deliverables and/or analytical project reports for assigned custom consulting engagements.

### Position Accountabilities and Specific Duties

- Provide analytical support to project team
- Conducts (or assistance in conducting) research using library facilities, Gartner Research Analysts, other Gartner resources and self designed primary research.
- Analyze, interpret, extrapolate, project and model data to reach conclusions (or assist in same)
- Prepare (or assist in the preparation of) written reports with text, charts, and spreadsheets for internal presentation and for inclusion in reports going to clients.
- May participate in opening client conference at which the engagement is defined (kick-off meetings)
- May participate in final conference with client at which final report is delivered. No advanced degrees, training or certifications are required.
- As assigned, complete sections of significant customized consulting assignments covering a variety of subject areas including technologies, markets, products, competitive analysis, financial impact, etc.

### Position Specifications

- A. Education:
  - Bachelors Degree with at least one (1) year of experience working in the information technology industry
- B. Demonstrated experience:
  - In the information technology industry
  - Using spreadsheet software
- C. Required Technical/Functional Knowledge and Skills:
  - General Information Technology knowledge
  - Ability to make decisions
  - Ability to analyze problems
  - Use judgment effectively
  - Excellent listening and writing skills
  - Oral communication skills
  - Initiative and Resourcefulness

**Group 73001 Award 22601  
Contract: PS66085**

**May 1, 2013**

**Prices Burton Services (GSA Based) for New York State**

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## Description of IT Services and Pricing

Burton Group provides both comprehensive Research and Advisory Services and custom Consulting Services and Workshops as outlined below. Additional information on all services offered by Burton Group can be found at [www.burtongroup.com](http://www.burtongroup.com).

## Research and 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, indepth 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 Research and Advisory Services of Burton Group IT1 or any individual or combination of Coverage Areas. Burton Group provides these comprehensive services on an annual license basis.

### **Burton Group IT1 – RENEWAL ONLY**

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.

**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 Assistant Program for aid in locating information in our Coverage Area databases.

### **Coverage Areas**

Burton Group's 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, Email 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.

## 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.

## CONTENT TYPES

Burton Group Research and Advisory Services include the following content deliverables:

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

*NOTE:* In updating, expanding, and improving its Research and Advisory Services, 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 email. Each DocAlert contains a summary of the published analysis, as well as the hypertext-linked information needed to quickly access the document.

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, email 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, regulatory compliance, related etiquette and incentive system issues)
*Cloud Computing	Software-as-a-service (SaaS), Customer relationship management, Web conferencing, Online productivity applications, Email and online collaboration, Application Platforms-as-a-Service (PaaS), Online middleware, Software Infrastructure-as-a-Service (SaaS), Online datasets, Identity and security services, Cloud security and risk management, Hardware Infrastructure-as-a-Service (HaaS), 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

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

### **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.

### **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.

### ***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.

### ***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-lifecycle 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.

### ***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.

### **EXECUTIVE ADVISORY PROGRAM**

Burton Group's Executive Advisory Program (EAP) serves as an interface for executives into the Burton Group Research and Advisory Services. 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.

### 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 Advisory Program (EAP)—as more fully 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.

### PRICING

Burton Group's pricing for Research and Advisory Services 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 commencement of Deliverables. Delivery is complete upon Burton Group providing the ordering activity with access to the Licensed Content.

Burton Group offers a choice in its Research and Advisory Services of Burton Group IT1 or any individual or combination of Coverage Areas.

**Burton Group Classic 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:**

1. Application Platform Strategies ("APS")
2. Collaboration and Content Strategies ("CCS")
3. Data Center Strategies ("DCS")
4. Data Management Strategies ("DMS")
5. Identity and Privacy Strategies ("IdPS")
6. Network and Telecom Strategies ("NTS")
7. Security and Risk Management Strategies ("SRMS")

## Renewal Only

# Employees		Annual License Fee ONE COVERAGE AREA*	Catalyst Tickets	Annual License Fee BURTON GROUP CLASSIC IT1*	Catalyst Tickets
> 0	< 1,000	\$19,600	2	\$69,520	4
1,000	25,000	\$30,790	2	\$135,310	8
25,000	50,000	\$40,590	3	\$147,900	10
50,000	75,000	\$48,990	3	\$163,770	10
75,000	+	\$53,660	4	\$207,630	12

\* **Renewal Only:** effective January 1, 2013, Burton Research products are no longer available for new orders. Annual renewals of existing contracts are available through February 23, 2014.

- All Research and Advisory Services include unlimited Analyst Dialogues.
- All subscriptions begin on the first of a calendar month and are for a twelve (12) month term.

**Note 1:** When two separate Coverage Areas are purchased, a discount of twenty (20) percent will be taken off of the total price of the two Coverage Areas.

**Note 2:** Ordering Activities 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 Research and Advisory Services 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.

## 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

### PRICING

Burton Group's pricing for Consulting Services is based on a daily rate.

<b>Consulting Resource</b>	<b>Daily Rate (8 Hours)</b>	<b>Hourly Rate</b>
Senior Consultant	\$2,828.00	\$353.50
Research Director/Service Director/Senior Executive	\$4,050.00	\$506.25

<b>Workshop Price</b>	<b>Price</b>
2-Day Workshop	\$17,600.00
3-Day Workshop	\$22,000.00

### ***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.