Lenovo

North America

CIO Playbook 2025:
It's Time for AI-nomics

Research insights by

IDC

Introduction

IDC has conducted a study, commissioned by Lenovo, to understand how organizations globally have fared with their artificial intelligence (AI) journeys. This eBook draws insights from custom research commissioned by Lenovo, surveying 900 IT and business decision-makers from mid-to-large organizations in the United States and Canada.
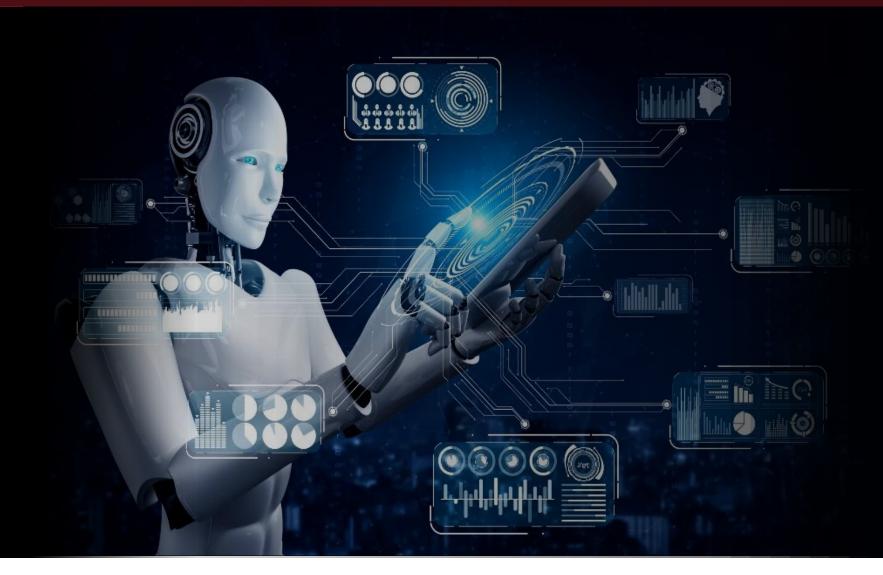
AI-nomics From an Enterprise Perspective

The research highlights the shifting priorities of enterprises, which are now focusing on business outcomes rather than just the AI technology itself. Enterprises increasingly recognize and prioritize the transformative impacts of AI. The research found that there will be a notable shift in AI spending towards generative AI (GenAI) in 2025 and a greater focus on back-office / operational AI use cases, particularly in IT, where organizations have seen the most success so far. Expectations are high, and businesses aren't just looking for financial returns, but also the operational and productivity benefits that come with successful AI implementation.

Investment Priorities for the Next Wave of AI Implementation

This eBook delves into key foundational areas for AI success such as data, governance / compliance, digital infrastructure, and edge devices, which organizations have identified as investment priorities to fuel the next wave of AI implementation. These investments are crucial for building scalable AI solutions that can deliver measurable business outcomes.

Read on for a summary of key insights and takeaways for Chief Information Officers (CIOs) to consider for 2025, followed by a deeper dive into the findings.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=900

CIO Strategic Imperatives

Here are some key insights from IDC's research involving 900 North American IT and business decision makers (ITBDMs), along with considerations for CIOs for 2025:

	Insights	Considerations for CIOs for 2025
1	**Business Priorities** **FOCUS SHIFTS FROM TECH DEPLOYMENT TO BUSINESS OUTCOMES** Organizations are moving past AI experimentation to leveraging it for tangible business results like enhanced customer experience, business growth, and higher productivity and operational efficiency, while prioritizing decision-making and time-to-market.	▶ Drive strategic tech integrations to achieve measurable outcomes in customer experience, business growth, productivity, and operational efficiency. ▶ Leverage advanced analytics to enable data-driven decision-making and automate processes to accelerate product / service launches.
2	**AI Adoption** **HIGH OPTIMISM ABOUT AI, BUT ADOPTION MATURITY VARIES** 41% of North American organizations have adopted AI, but most are still in the early stages, faced with challenges like unclear ROI, insufficient AI-ready data, and lack of in-house expertise.	▶ Strengthen data security and management processes. ▶ Enforce AI governance frameworks. ▶ Encourage interdepartmental collaboration for AI skills development. ▶ Develop a comprehensive process for ROI measurement.
3	**AI Investments & Sentiment** **AI SPENDING TO SURGE ACROSS ALL REGIONS** AI investment is expected to more than double within the next year, with significant focus on security / privacy and IT consulting & services.	▶ Implement strong AI governance processes and security protocols to ensure effective data protection, management, and regulatory compliance. ▶ Invest in building and refining AI models. ▶ Establish robust AI model management practices to ensure model accuracy and reliability.
4	**Governance & Compliance** **GRC UNDERPINS RESPONSIBLE AND ETHICAL USE OF AI** More than half of organizations are establishing and enforcing governance, risk, and compliance (GRC) policies, with a focus on boosting their AI system's accountability and reliability.	▶ Develop and implement a robust GRC framework and policies that align with the organization's business objectives ▶ Cultivate a culture of risk-awareness and individual accountability across the organization ▶ Ensure responsible AI is an extension of the guiding principles of the organization

CIO Strategic Imperatives (continued)

Here are some key insights from IDC's research involving 900 North American IT and business decision makers (ITBDMs), along with considerations for CIOs for 2025:

Insights	Considerations for CIOs for 2025
5 AI Services **HEAVY RELIANCE ON PROFESSIONAL SERVICES FOR AI DEPLOYMENT** Poor data quality is hindering AI success, prompting organizations to invest in enhancing their data management capabilities through trusted professional services partnerships.	▶ Evaluate requirements for professional services in terms of data management, system integration, user training, and support for AI systems' management. ▶ Clearly define project performance metrics such as costs, timelines. ▶ Regularly review progress.
6 AI Data **STRONG EMPHASIS ON DATA INITIATIVES TO PROPEL AI SUCCESS** 32% of organizations are prioritizing the development of their data management capabilities, with data analytics topping the list for 2025 tech investments.	▶ Strengthen the organization's data infrastructure and capabilities to support AI projects. ▶ Collaborate with HR to develop skills development programs for data management.
7 AI Infrastructure **AI DEPLOYMENT PREFERENCES LEAN TOWARDS ON-PREMISE AND HYBRID APPROACHES** 58% of organizations have highlighted that their AI workloads will primarily be on-premise or hybrid cloud.	▶ Adopt hybrid architectures that enable seamless workload movement between environments, ensuring cost optimization and security. ▶ Prioritize on-premise solutions for sensitive AI workloads or those with strict latency and compliance requirements, where cloud scalability is less critical.
8 AI Devices **AI-POWERED PCS SET FOR SIGNIFICANT GLOBAL UPTAKE** 42% of organizations believe that AI-powered devices boost employee productivity and experience. As a result, 95% are piloting, planning, or exploring AI-powered PC rollouts in the mid-to-long term.	▶ Assess the need for AI-powered devices across business functions and align adoption plans with device refresh cycles. ▶ Invest in user training to enable the workforce to effectively use these devices.

North America Insights

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Business Priorities | AI Adoption | AI Investments & Sentiment | AI Governance & Compliance | AI Services | AI Data | AI Infrastructure | AI Devices

Business Priorities
Moving Beyond Technology to Business Outcomes

Business Priorities - North America

		2024	2025	YoY Change
	Improving **customer experience** & **satisfaction**	1	1	-
	Enhancing **decision making**	9	2	7
	Increasing **revenues** & **profit** growth	3	3	-
	Improving employee **productivity**	7	4	3
	Accelerating **time-to-market**	10	5	5
	Applying emerging **AI technologies** (e.g., GenAI)	2	7	-5

► As organizations advance along the tech maturity curve, their focus shifts from experimenting with emerging technologies like AI to leveraging them for tangible business outcomes, including enhanced customer experience, increased revenues, and higher productivity.

► AI can improve customer experience by providing personalized interactions, automating customer service tasks, offering instant responses, and predicting customer needs.

► North American organizations are focused on improving decision-making and speeding up time-to-market, with the former being the top business priority for Canadian organizations.

Considerations for CIOs

Drive strategic tech integrations to achieve measurable outcomes in customer experience, business growth, productivity, and operational efficiency. Leverage advanced analytics to enable data-driven decision-making and automate processes to accelerate product / service launches.

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AI Adoption
High Optimism About AI, but Adoption Maturity Varies

Considering or **evaluating** AI, but with no plans — **14%**

Planning to start using AI in the next 12 months — **45%**

Non-Adopters: Beginning the Journey

While about 59% of the organizations are lagging in AI adoption—primarily due to a lack of skills or expertise to operate and manage AI systems and persisting data security and risk management concerns—many are planning to adopt AI in the near future, indicating strong enthusiasm and motivation to harness AI's potential to transform operations, improve efficiency, and drive competitive advantage.

Early stages of development / implementation — **18%**

Supporting different **pilot** projects / use cases — **20%**

AI is **systematically adopted** across the enterprise — **3%**

Adopters: On the Path of Implementation

41% of the organizations have adopted AI, but most are still in the early stages of implementation or experimentation—testing the technologies on a small scale or in specific use cases—as they work to overcome challenges of unclear ROI, insufficient AI-ready data, and a lack of in-house AI expertise.

Supplementary Insights

37 AI POCs ▶ **5** AI Production Launches

The high number of AI proof-of-concepts (POC) but low conversion to production indicates the low level of organizational preparedness in terms of data, processes, and IT infrastructure.

Source: IDC's 2024 Future Enterprise Resiliency and Spending (FERS) Survey, Wave 4

Considerations for CIOs

Strengthen data security and management processes and enforce AI governance frameworks. Encourage interdepartmental collaboration for AI skills development and develop a comprehensive process for ROI measurement.
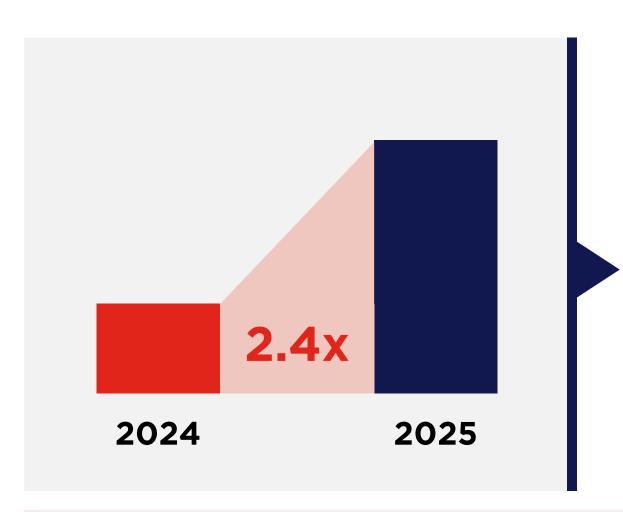
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AI Investments & Sentiment
AI Spending Expected to Surge Significantly Across all Regions

Growth in AI as a % of IT Spend

2.4x

2024   2025

Top AI Investments in the Next 12 Months

1	**Security** & **privacy** for AI
2	IT **consulting** & **services** for AI projects
3	Developing AI **models** & AI **model management**
4	**Data science** & business **intelligence**
5	AI embedded **applications**

▶ Spending on AI initiatives is expected to more than double over the next 12 months, with security / privacy and IT consulting &services being key investment areas. Expectations are very high, with organizations globally anticipating a threefold ROI from their AI expenditures. This surge highlights AI's growing role in enhancing security and optimizing IT operations, making these areas prime targets for increased funding.

▶ Data will also receive significant focus, particularly in developing AI models, AI model management, and data science / business intelligence. Emphasizing these areas underscores data's critical role in AI advancements. Investments in robust AI model development and management aim to improve system accuracy and efficiency. Additionally, leveraging data science and business intelligence will enable companies to extract valuable insights, facilitating better decision-making and strategic planning.
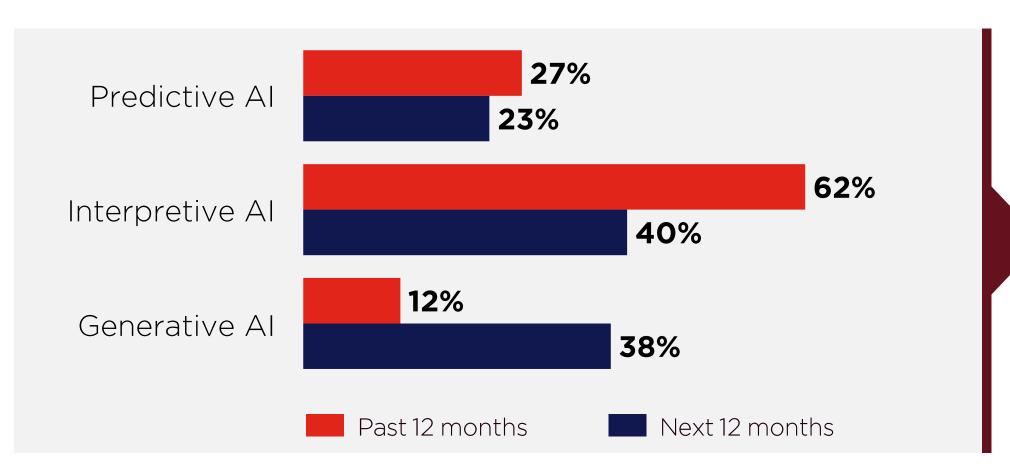
Considerations for CIOs

Implement strong AI governance processes and security protocols to ensure effective data protection, management, and regulatory compliance. Invest in building and refining AI models and establish robust AI model management practices to ensure model accuracy and reliability.

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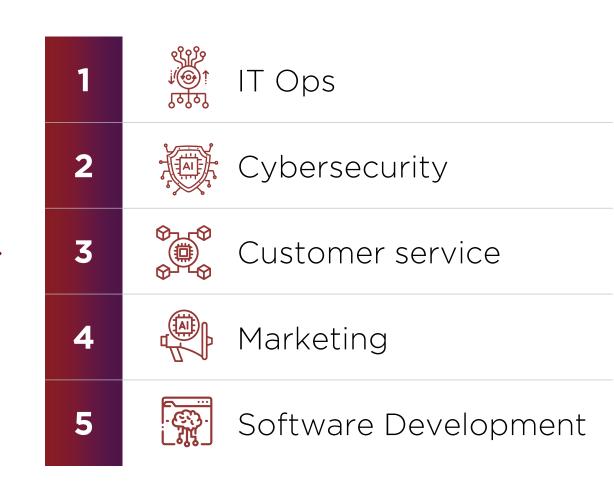
AI Investments & Sentiment (continued)
Generative AI Gains Momentum

AI Implementations by Category: Past and Future

Predictive AI
- 27% (Past 12 months)
- 23% (Next 12 months)

Interpretive AI
- 62% (Past 12 months)
- 40% (Next 12 months)

Generative AI
- 12% (Past 12 months)
- 38% (Next 12 months)

🟥 Past 12 months   ⬛ Next 12 months

Note: "Past 12 months" only adopters were eligible to answer for this period.

Business Functions Adopting AI Use Cases

1. IT Ops
2. Cybersecurity
3. Customer service
4. Marketing
5. Software Development

IDC Observation
Organizations globally are prioritizing IT use cases.

▶ Over the next 12 months, tech and business leaders will shift focus from interpretative AI to generative AI use cases to drive key business outcomes such as higher productivity and efficiency, better customer experience, and the creation of new business opportunities.

▶ Interpretive AI will continue to be deployed in use cases where business decisions rely on AI output or in industries like healthcare, finance, and legal, where transparency and explainability are critical. Predictive AI will continue to be an important area for investment.

▶ Key functions that will adopt AI include IT operations and cybersecurity. While the former will use AI primarily for service automation and financial operations use cases, cybersecurity will leverage AI for advanced threat detection, response, and prevention.
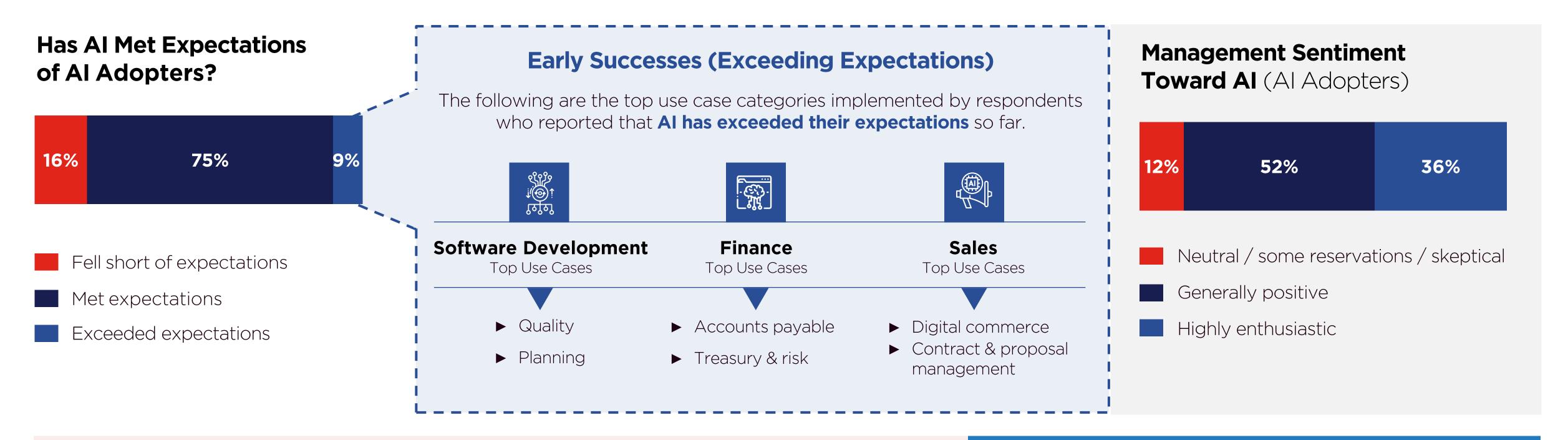
Considerations for CIOs

Create a comprehensive plan and roadmap to integrate various AI capabilities into different business processes, outlining the purpose, objectives, and success metrics for each application. Seek partners with portfolio experience who understand the applicability of different AI technologies and capabilities across the IT stack.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=900

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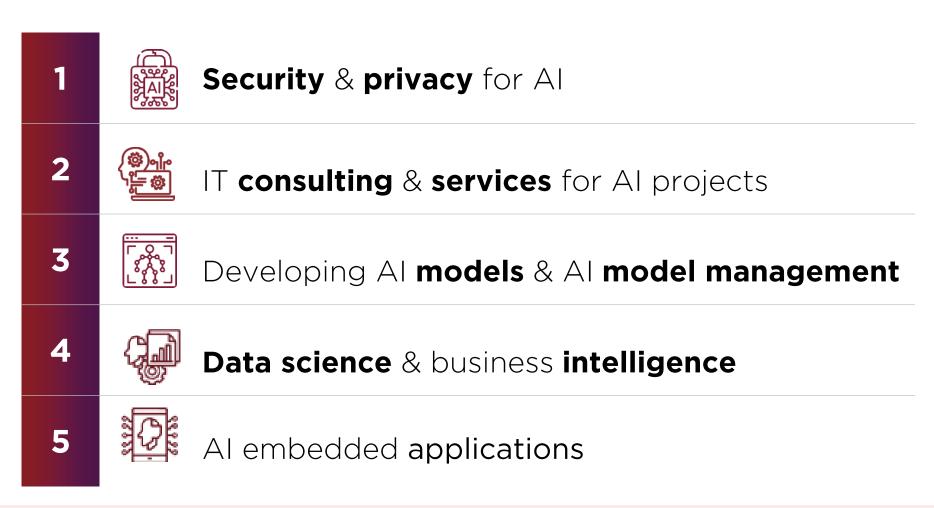
AI Investments & Sentiment (continued)
Despite Exceeding Expectations, Some Remain Skeptical About AI Adoption

Has AI Met Expectations of AI Adopters?

| 16% | 75% | 9% |

- 🟥 Fell short of expectations
- 🟦 Met expectations
- 🟦 Exceeded expectations

Early Successes (Exceeding Expectations)

The following are the top use case categories implemented by respondents who reported that **AI has exceeded their expectations** so far.

Software Development
Top Use Cases

Finance
Top Use Cases

Sales
Top Use Cases

Software Development	Finance	Sales
▶ Quality	▶ Accounts payable	▶ Digital commerce
▶ Planning	▶ Treasury & risk	▶ Contract & proposal management

Management Sentiment Toward AI (AI Adopters)

| 12% | 52% | 36% |

- 🟥 Neutral / some reservations / skeptical
- 🟦 Generally positive
- 🟦 Highly enthusiastic

▶ 16% of AI adopters highlighted that AI projects implemented by their organizations surpassed expectations, primarily in areas of software development, finance, and sales use cases.

▶ While over 90% of all AI projects met or exceeded expectations, slightly more than one-third of management remains skeptical about AI adoption. This indicates a significant number of adopters are still apprehensive about fully committing to AI deployment due to ongoing challenges.

Considerations for CIOs

Prioritize quick-win AI projects to demonstrate business value and develop a comprehensive measurement framework to assess the progress and success of AI initiatives on an ongoing basis.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=900

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AI Investments & Sentiment (continued)
Delivering on AI-nomics: Address Roadblocks by Bridging the Skills Gap and Solving the Data Conundrum

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1	**Data quality** issues
2	IT **infrastructure / network** costs
3	**Challenges scaling AI** across the enterprise (including lack of departmental support)
4	Problems **integrating AI** with existing systems & processes
5	**GRC** requirements / **security** issues

Top **Factors** for **Successful AI** Implementation Moving Forward

1	Ensuring data **compliance** & **sovereignty**
2	Access to **partners** with strong AI capabilities
3	Availability of **AI-powered PCs** & **edge devices**
4	Availability of **internal AI expertise**
5	Employee **training** & **upskilling**

▶ Resolving issues pertaining to high-quality data availability and regulatory compliance are crucial for the successful implementation and operations of AI projects. If not managed effectively, these challenges can lead to project failure, so overcoming them is necessary to achieve a high success rate with AI initiatives.

▶ AI-powered PCs are critical for AI success as they democratize access to AI tools within the organization. With advanced processors, they can manage complex AI computations, speeding up data analysis and model training. Additionally, they enable seamless integration of AI applications into existing workflows, thereby addressing integration-related challenges.

Considerations for CIOs

Ensure collaboration between IT and line of business executives to prioritize AI-enabled business models and develop a strategy to treat data as a product. Additionally, promote AI-powered PCs internally and provide user training to effectively use and integrate them into daily workflows.
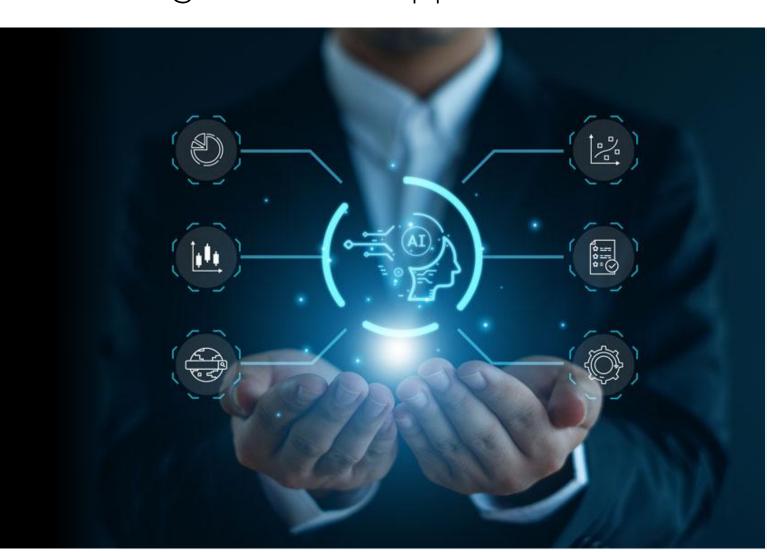
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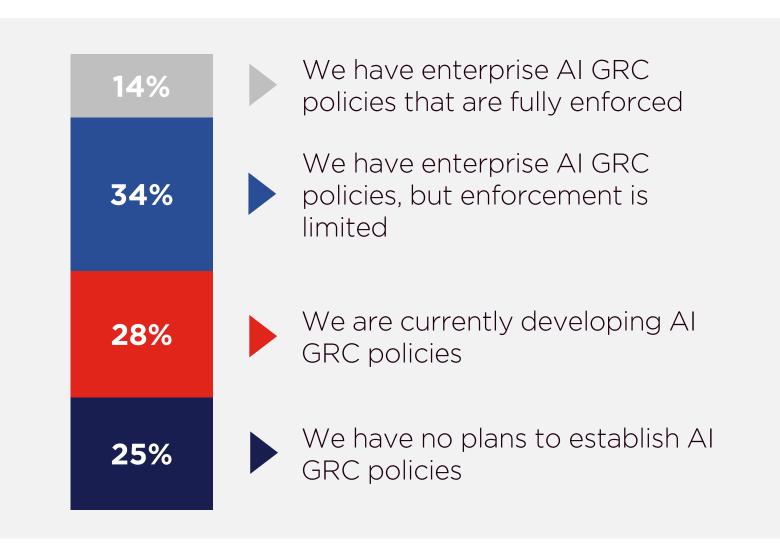
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AI Governance & Compliance
GRC Underpins Responsible and Ethical Use of AI

Organizations' Approach to **Governance, Risk, and Compliance (GRC)**

14% — We have enterprise AI GRC policies that are fully enforced

34% — We have enterprise AI GRC policies, but enforcement is limited

28% — We are currently developing AI GRC policies

25% — We have no plans to establish AI GRC policies

Most Important Aspects of AI-related GRC

1 — Greater AI **accountability** & **reliability**

2 — Ethical **AI frameworks**

3 — Continuous **monitoring** & **improvement**

4 — Improved model **governance** & **policy control**

5 — Enhanced AI **privacy** & **security**

▶ GRC is a foundational element of AI strategy, with more than half of the organizations establishing and enforcing related policies with a focus on enhancing AI system's accountability and reliability, establishing comprehensive ethical AI frameworks, and prompting regular monitoring and improvements. This underscores the strong emphasis on risk management and regulatory compliance to ensure responsible and ethical AI practices.

▶ GRC is a key success factor for AI projects. Fulfilling GRC requirements and security concerns were among the top reasons AI projects failed to meet management's expectations, particularly in the United States, where it ranked among the top three factors.

Considerations for CIOs
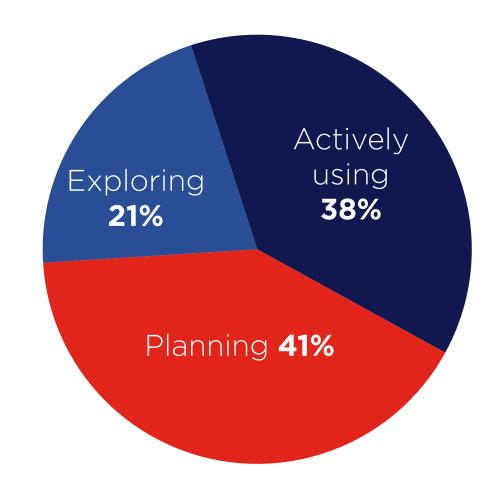
Develop and implement a robust GRC framework and policies that align with the organization's business objectives. Cultivate a culture of risk-awareness and individual accountability across the organization. Responsible AI should be an extension of the guiding principles of an organization.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=900

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AI Services
AI Deployment Heavily Dependent on Professional Services

Current Usage of **AI Professional Services**

Pie chart:
- Actively using **38%**
- Planning **41%**
- Exploring **21%**

▶ Most organizations are leveraging professional services partnerships for AI deployment, particularly in Canada, where about half of the organizations are actively using AI professional services. These AI partnerships are primarily driven by the need to develop strong data management practices and ensure the availability of high-quality data.

▶ Professional service providers help organizations organize their data to be AI-ready and optimize processes. Professional services are also used to bridge gaps in in-house AI expertise—a key challenge for AI adoption—and to strengthen the organization's data security and risk management posture.

What Do Organizations **Seek in a Partner**?

1	Support for **data management**
2	AI **knowledge** & **expertise** (including scaling AI solutions)
3	Support for data **security** & **privacy**
4	**Infrastructure** & **hardware** support for AI workloads
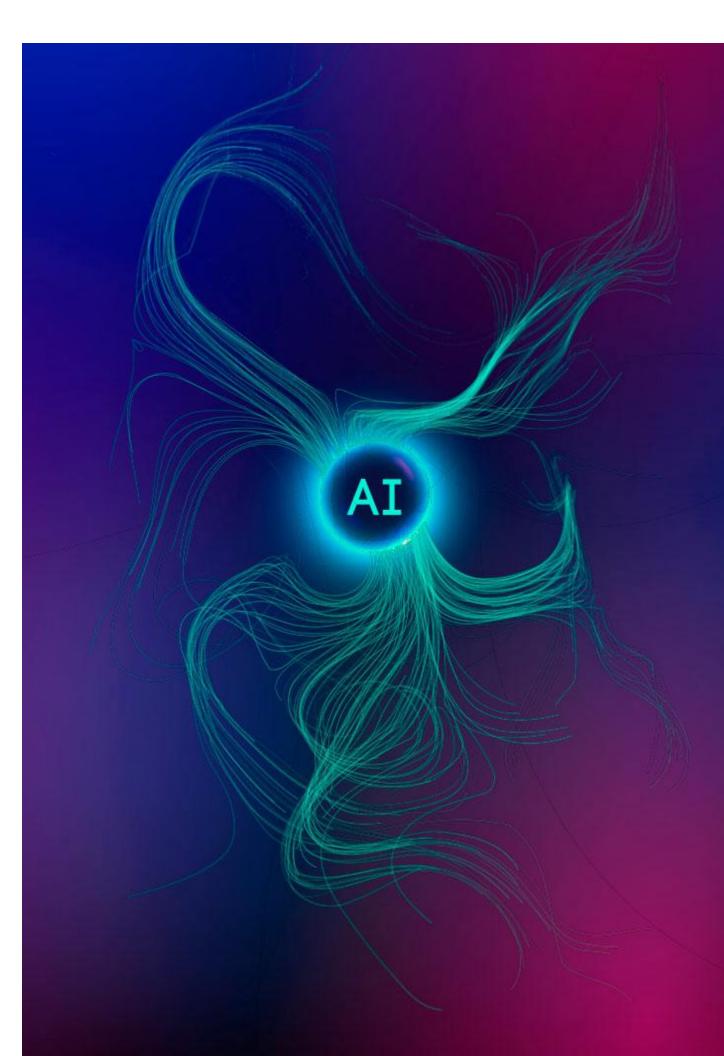
Considerations for CIOs

Evaluate requirements for professional services in terms of data management, system integration, user training, and support for AI systems' management. Clearly define project performance metrics such as costs, timelines, and ROI, and regularly review progress.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=900

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AI Data
Organizations to Double Down on Data to Power AI Success

Survey Insights

Data quality issues are the **#1 inhibitor** causing AI projects to fall short of expectations.

32% of US and Canadian organizations highlighted that they will be developing data management capabilities in the next 12 months.

Data Science and **Business Intelligence** are consistently highlighted as top areas and skills that organizations plan to invest in and focus on developing.

► Data is the cornerstone of an organization's AI strategy. Ensuring high-quality data is crucial, as poor-quality data is the leading cause of AI project failures. Recognizing this, organizations are committing to enhancing their data quality to ensure the success of their AI initiatives.

► Nearly ⅓ of organizations prioritize the development of their data management capabilities, with data science and business intelligence being among the top priorities for tech investment in 2025. This focus highlights the importance of building capabilities to enable data-driven decision-making, enhance risk management, and drive innovation.

Considerations for CIOs

Strengthen the organization's data infrastructure and capabilities to support AI projects. Collaborate with HR to develop skills development programs on data management.

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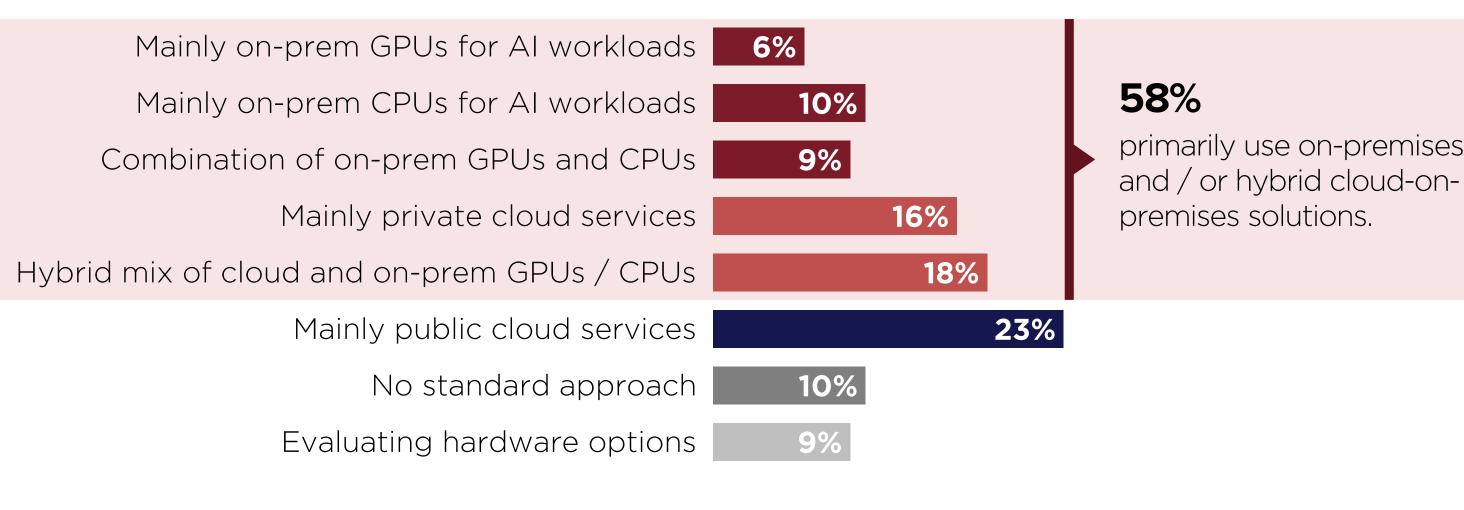
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AI Infrastructure
AI Deployment Preference Leans Toward On-Premise and Hybrid Approaches

Primary **Infrastructure Approach** to AI Workloads

Approach	%
Mainly on-prem GPUs for AI workloads	6%
Mainly on-prem CPUs for AI workloads	10%
Combination of on-prem GPUs and CPUs	9%
Mainly private cloud services	16%
Hybrid mix of cloud and on-prem GPUs / CPUs	18%
Mainly public cloud services	23%
No standard approach	10%
Evaluating hardware options	9%

58% primarily use on-premises and / or hybrid cloud-on-premises solutions.

▶ Organizations are primarily leveraging on-premise infrastructure to deploy AI workloads or adopting a hybrid approach. While the on-premise option provides greater security and control over the infrastructure, the hybrid approach combines these advantages with the flexibility, scalability, and performance benefits of cloud solutions.

▶ Only about ¼ of organizations are using public cloud services for AI deployments, mainly from Canada, highlighting the challenges of data security and privacy, cost predictability, as well as limited customization opportunities associated with public cloud solutions.

Considerations for CIOs

Adopt hybrid architectures that allow seamless movement of workloads between environments and deliver on cost optimization and security. Prioritize on-premise solutions for sensitive AI workloads or those with strict latency and compliance requirements, where the scalability of the cloud is less necessary.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=900

AI Devices
AI-Powered PCs Set for Significant Global Uptake

Survey Insights

42% of respondents at organizations in the US and Canada believe that **AI-powered devices** boost employee **productivity** and **experience**.

AI-Powered PCs Adoption

- 1% — Not considering
- 68% — Planning / considering
- 27% — Piloting
- 4% — Extensively used

Global

▶ While nearly all organizations are in some phase of AI-powered PC adoption, approximately ⅔ are considering investing in these devices and are expected to make the switch as their device refresh cycles approach.

▶ A key benefit of adopting AI-powered PCs includes the ability to summarize large amounts of information and enhance inter-departmental communications and collaboration. Additionally, these devices help to enhance user experiences, offer greater customizability, and come with advanced feature sets.

Considerations for CIOs

Assess the need for AI-powered devices and align adoption plans with device refresh cycles. Invest in user training to enable the workforce to effectively use these devices.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=900

CIO
Insights

A conversation with the CIO of Teknion
AI Across the Business: Pivoting from Learning to Delivering Efficiency

John Comacchio
CIO and SVP at Teknion

"At the beginning, AI isn't necessarily about saving money, it's creating efficiency. We have to get used to as a business to saying, 'Let's become more efficient as we implement embedded AI,' which we'll then be able to become more effective at how we operate. The money will eventually save itself."

Teknion is a family-owned, international furniture manufacturer committed to empowering customers through collaborative design and long-term investment. Design thinking is integral to Teknion's business approach, influencing everything from product development to environmental sustainability. Teknion maintains vertical integration, controlling production to ensure quality, reduce costs, and enable customization. Sustainability is a core value, with ongoing efforts to minimize environmental impact and engage with complex challenges.

Teknion's Multi-Pronged Approach to AI
- Utilize embedded AI within commercial enterprise applications by transitioning from "AI undercover" to a more deliberate deployment to drive efficiencies across the business.
- Investigate how to integrate AI into Teknion's proprietary systems by identifying the most critical family of use cases by application domain that can transform and positively impact the business.
- Enhance Teknion's website by incorporating AI-powered personalization to cater to architects and designers who are stakeholders. Begin building and ideating to meet customer needs.

AI in Production: Using Machine Learning and a Proprietary Language Model to Enhance Operations
- **Challenge**: Customers occasionally pause delivery of new furniture to building sites. This disruption has implications for production scheduling, factory operations, and robotic processes.
- **Outcome**: Teknion can efficiently reorganize factory floor and streamline production lines to accommodate new schedules. This is made possible due to the propriety data available for model training. Ultimately new schedule outputs are produced with AI, and over time less and less human intervention is required.

What's Next: Agentic AI to Improve Customer Service
Enhancing and streamlining customer experience is the next big focus area, leveraging small language models. In 2025 Teknion will be building proof of concepts (POCs) for agentic AI. Many of Teknion's existing systems are data-intensive, providing a pathway for automation with agents, such as in pattern recognition. AI agents can be trained to answer fundamental calls, for example, inquiries from distributors about product delivery status.
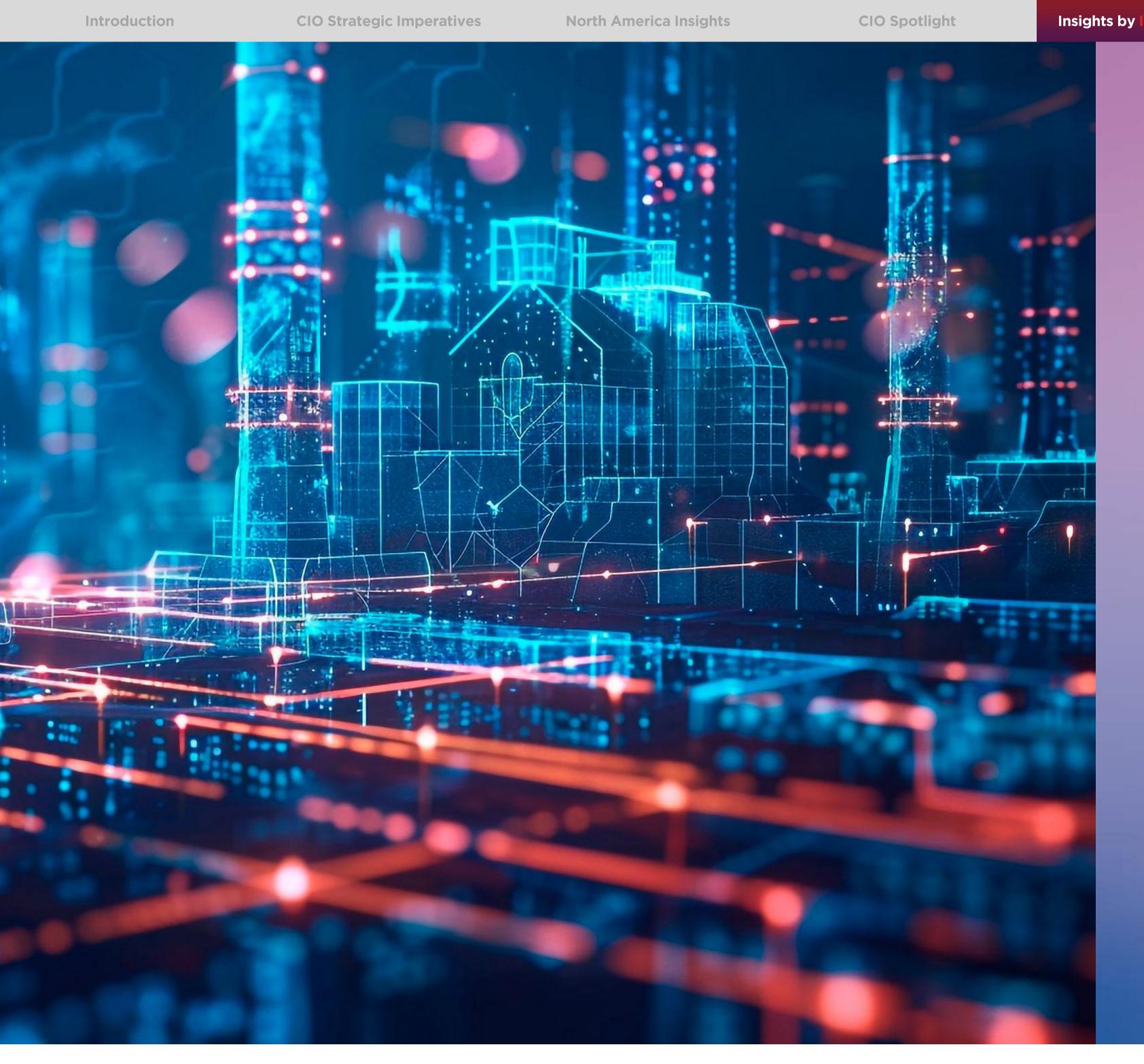
Capabilities Needed as a Foundation for AI
- People with an interest in learning AI: "Get the people who are thinking differently and not fearful of trying."
- Data: "It used to be about people, process, and technology. Now with AI the data is so much more critical."
- Core system modernization and tech stack: Planning for an entire refresh of technology from compute and storage to network and devices. Speed will be critical as Teknion's operations cannot afford network latency.

Best Practices for Moving from AI POCs to Production
- You can never over plan. Be very clear on the risks and communicate extensively. Prepare to stagger / stop / start AI projects.
- Take an incremental budget approach. Breaking AI initiatives into stages allows everyone to get on board and understand the plans and outcomes. "You're not pretending you're going to solve something with this massive budget."
- Be upfront about the human element so that employees know the objectives for AI. Proactively create a change management plan.

Source: CIO Interview with IDC, January 2025

Insights by
Industries
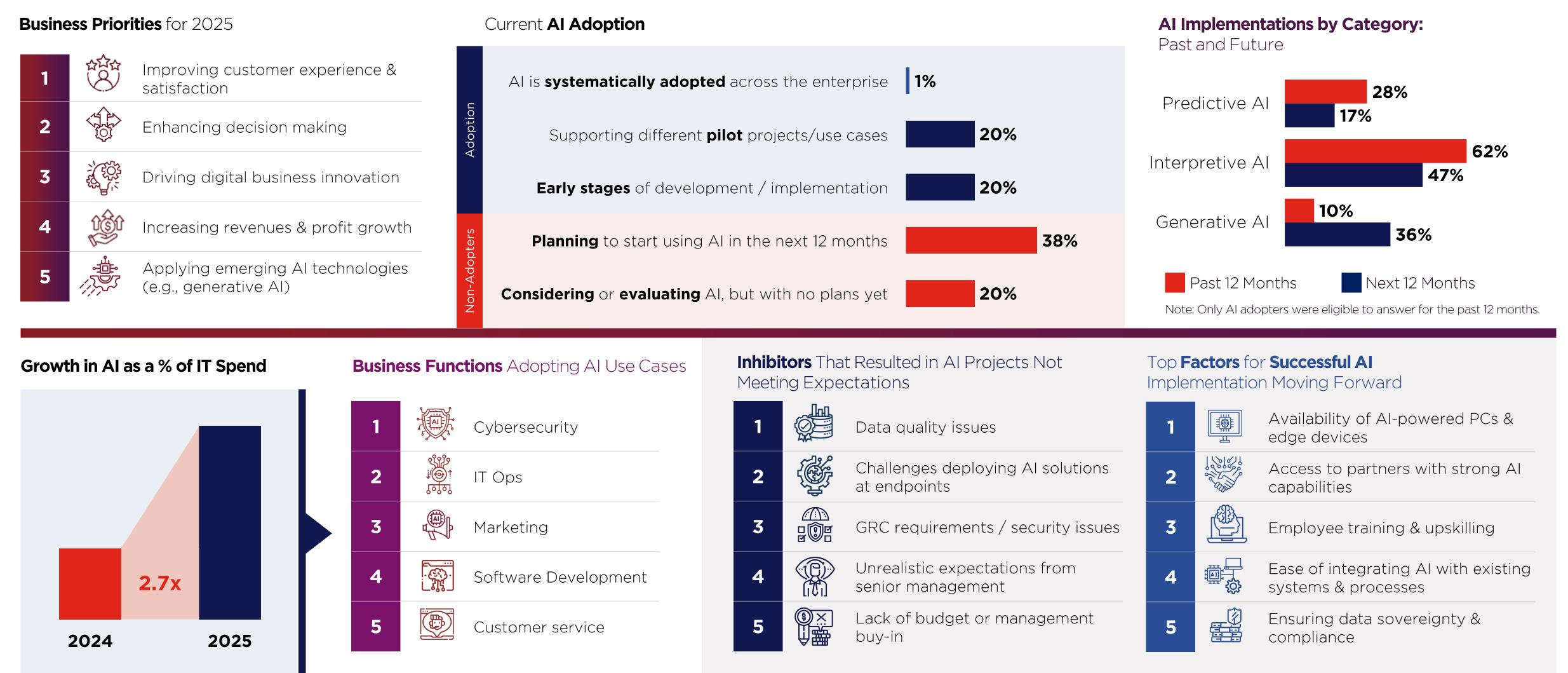
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BFSI | Retail | Manufacturing | Healthcare | Government

BFSI Overview

The banking, financial services, and insurance (BFSI) industry depends on advanced technology for secure transactions, fraud detection, and personalized digital banking experiences. The sector also relies on robust data analytics and AI for risk assessment, claims processing, and tailored services. AI adoption in the BFSI sector by 2025 will be pivotal in enhancing customer experience, decision-making, and driving digital innovation. With 38% planning to start using AI within the next year, the focus will be on interpretive AI use cases (47%) to analyze unstructured data and generative AI (36%) to create new content. However, success will hinge on overcoming data quality issues and ensuring robust employee training and upskilling.

Business Priorities for 2025

1. Improving customer experience & satisfaction
2. Enhancing decision making
3. Driving digital business innovation
4. Increasing revenues & profit growth
5. Applying emerging AI technologies (e.g., generative AI)

Current AI Adoption

Adoption
- AI is **systematically adopted** across the enterprise — 1%
- Supporting different **pilot** projects/use cases — 20%
- **Early stages** of development / implementation — 20%

Non-Adopters
- **Planning** to start using AI in the next 12 months — 38%
- **Considering** or **evaluating** AI, but with no plans yet — 20%

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	28%	17%
Interpretive AI	62%	47%
Generative AI	10%	36%

■ Past 12 Months   ■ Next 12 Months

Note: Only AI adopters were eligible to answer for the past 12 months.

Growth in AI as a % of IT Spend

2024 → 2025 : **2.7x**

Business Functions Adopting AI Use Cases

1. Cybersecurity
2. IT Ops
3. Marketing
4. Software Development
5. Customer service

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Data quality issues
2. Challenges deploying AI solutions at endpoints
3. GRC requirements / security issues
4. Unrealistic expectations from senior management
5. Lack of budget or management buy-in

Top Factors for Successful AI Implementation Moving Forward

1. Availability of AI-powered PCs & edge devices
2. Access to partners with strong AI capabilities
3. Employee training & upskilling
4. Ease of integrating AI with existing systems & processes
5. Ensuring data sovereignty & compliance

IDC CIO Playbook 2025 Survey, commissioned by Lenovo, BFSI n=143 | BFSI = Banking, Financial Services, and Insurance

| Introduction | CIO Strategic Imperatives | North America Insights | CIO Spotlight | Insights by Industries & Markets | Why Lenovo | Research Methodology |

BFSI | Retail | Manufacturing | Healthcare | Government

BFSI Overview (continued)
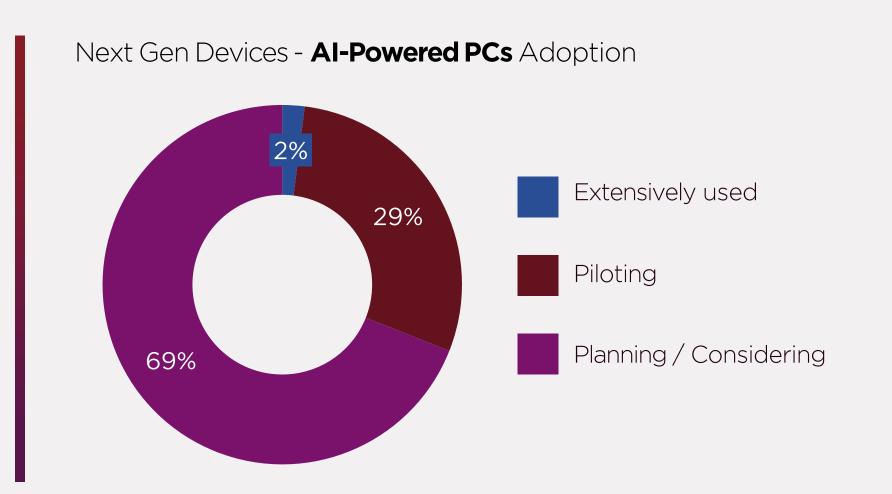
Data quality issues remain key for BFSI AI projects in 2025, necessitating robust data management support. BFSIs often have data silos and inconsistent data formats. Fragmentation and variability of data types across different systems and departments hinders comprehensive analysis. With 62% of organizations adopting on-premises, private, or hybrid infrastructure for AI workloads, the focus is on scalable and secure solutions. Additionally, 69% plan / considering to integrate AI-powered PCs to enhance operational efficiency, highlighting the sector's commitment to leveraging advanced AI technologies.

Survey Insights

Data quality issues are the **#1 inhibitor** causing AI projects to fall short of expectations.

Overall **Infrastructure** Deployment – Next 12 Months

Public Cloud	29%
Edge / Branch / Small Campus Locations	24%
On-premises Private Cloud	24%
Traditional on-premise data center / traditional hosted data center	23%

Primary **Infrastructure** Approach to **AI Workloads**

10%	Public Cloud
62%	On-Premises / Private / Hybrid
21%	No standard approach
8%	Evaluating

What Do Organizations **Seek in a Partner**?

1. AI knowledge & expertise (including scaling AI solutions)
2. Support for data management
3. Ability to help our organization deliver measurable business outcomes
4. Provision of as-a-service (i.e., SaaS / IaaS / PaaS) pricing & offerings

Next Gen Devices - **AI-Powered PCs** Adoption

- 2% Extensively used
- 29% Piloting
- 69% Planning / Considering

IDC CIO Playbook 2025 Survey, commissioned by Lenovo, BFSI n=143 | BFSI = Banking, Financial Services, and Insurance

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BFSI | Retail | Manufacturing | Healthcare | Government

Retail Overview

Retailers are increasingly relying on advanced technology solutions for inventory management, personalized marketing through data analytics and AI, and seamless omnichannel platforms. Robust cybersecurity measures are also essential to protect customer data and maintain trust. As a result, retailers will be deploying AI in 2025 to reduce business risk and enhance customer experience. With 57% planning to start using AI within the next year, interpretive AI use cases (55%) will dominate, analyzing unstructured data to drive insights. However, success will depend on overcoming challenges in scaling AI and ensuring robust employee training and data compliance.

Business Priorities for 2025

1	Reducing business risk & cyber threats
2	Improving sustainability
3	Improving customer experience & satisfaction
4	Applying emerging AI technologies (e.g., generative AI)
5	Improving employee productivity

Current AI Adoption

Adoption
- AI is **systematically adopted** across the enterprise — **3%**
- Supporting different **pilot** projects / use cases — **18%**
- **Early stages** of development / implementation — **20%**

Non-Adopters
- **Planning** to start using AI in the next 12 months — **57%**
- **Considering** or **evaluating** AI, but with no plans yet — **2%**

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	46%	16%
Interpretive AI	46%	55%
Generative AI	7%	29%

■ Past 12 Months ■ Next 12 Months

Note: Only AI adopters were eligible to answer for the past 12 months.

Growth in AI as a % of IT Spend

3.4x

2024 → 2025

Business Functions Adopting AI Use Cases

1	Cybersecurity
2	IT Ops
3	Customer service
4	Supply Chain
5	Finance

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1	Challenges scaling AI across the enterprise (including lack of departmental support)
2	Data quality issues
3	GRC requirements / security issues
4	Challenges deploying AI solutions at endpoints
5	Unavailability or cost of AI expertise

Top Factors for Successful AI Implementation Moving Forward

1	Employee training & upskilling
2	Ensuring data sovereignty & compliance
3	Availability of internal AI expertise
4	Availability of AI-powered PCs & edge devices
5	Adequate budget & management commitment

Lenovo-IDC CIO Playbook 2025 Survey by IDC, Retail n=101

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BFSI | **Retail** | Manufacturing | Healthcare | Government

Retail Overview (continued)

Like for many other industries, data quality issues remain significant for retailers. Missing or insufficient data can affect inventory management, customer insights, and overall business operations, leading to suboptimal performance. Variability in data formats and standards across different systems and channels can lead to inaccuracies and hinder effective decision-making.
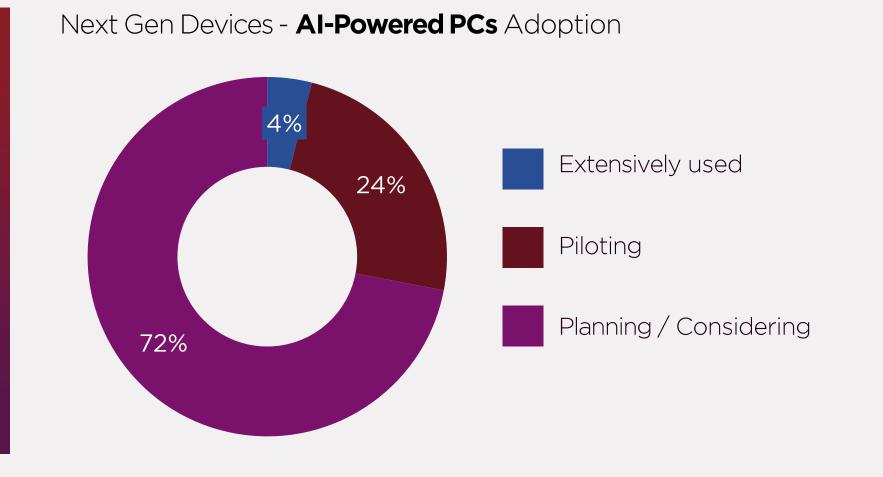
This is emphasizing the need for robust model and data management support in AI projects in 2025. With a significant majority preferring on-premises, private, or hybrid infrastructure for AI workloads, scalability and compliance are critical. Additionally, 72% plan to or are considering integrating AI-powered PCs to enhance operational efficiency, underscoring the sector's commitment to leveraging advanced AI technologies for improved performance.

Survey Insights

Data quality issues are the **#2 inhibitor** causing AI projects to fall short of expectations.

Overall **Infrastructure** Deployment – Next 12 Months

Public Cloud	28%
Edge / Branch / Small Campus Locations	21%
On-premises Private Cloud	25%
Traditional on-premise data center / traditional hosted data center	25%

Primary **Infrastructure** Approach to **AI Workloads**

- 6% — Public Cloud
- 94% — On-Premises / Private / Hybrid

What Do Organizations **Seek in a Partner**?

1. AI knowledge & expertise (including scaling AI solutions)
2. Support for AI modeling & development
3. Support for data management
4. Depth of partnerships with AI solution providers (ISVs, alliance partners)

Next Gen Devices - **AI-Powered PCs** Adoption

- 4% Extensively used
- 24% Piloting
- 72% Planning / Considering

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BFSI | Retail | **Manufacturing** | Healthcare | Government

Manufacturing Overview

While the manufacturing sector is large and diverse, companies at its core have an ongoing focus on operational efficiency and product quality enhancement. To that end, the manufacturing sector is focused on improving employee productivity, reducing business risk, and enhancing customer satisfaction through AI. With 39% planning to start using AI within the next year, generative AI use cases (45%) will be prominent, creating new content and code. Success will hinge on overcoming data quality issues and ensuring access to partners with strong AI capabilities.

Business Priorities for 2025

1. Improving employee productivity
2. Reducing business risk & cyber threats
3. Improving customer experience & satisfaction
4. Increasing revenues & profit growth
5. Enhancing decision making

Current AI Adoption

Adoption

- AI is **systematically adopted** across the enterprise — **9%**
- Supporting different **pilot** projects / use cases — **24%**
- **Early stages** of development / implementation — **23%**

Non-Adopters

- **Planning** to start using AI in the next 12 months — **39%**
- **Considering** or **evaluating** AI, but with no plans yet — **5%**

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	25%	25%
Interpretive AI	61%	30%
Generative AI	14%	45%

■ Past 12 Months ■ Next 12 Months

Note: Only AI adopters were eligible to answer for the past 12 months.

Growth in AI as a % of IT Spend

2.6x

2024 → 2025

Business Functions Adopting AI Use Cases

1. Marketing
2. Cybersecurity
3. Sales
4. Human resources
5. Customer service

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Data quality issues
2. Application latency / performance issues
3. Challenges scaling AI across the enterprise (including lack of departmental support)
4. IT infrastructure / network costs
5. Challenges deploying AI solutions at endpoints

Top Factors for Successful AI Implementation Moving Forward

1. Access to partners with strong AI capabilities
2. Availability of quality data
3. Ensuring data sovereignty & compliance
4. Adequate budget & management commitment
5. Availability of AI-powered PCs & edge devices

IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Manufacturing n=92

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BFSI | Retail | **Manufacturing** | Healthcare | Government

Manufacturing Overview (continued)
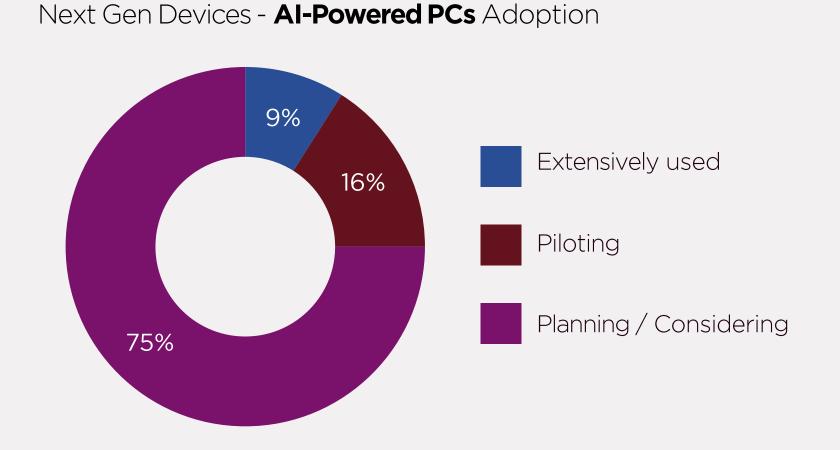
Data is at the heart of AI in manufacturing; production data, supply chain data, and quality control data are critical inputs for manufacturers. Thus, overcoming data quality issues will be key for AI projects in manufacturing, emphasizing the need for robust data management solutions. With 83% adopting on-premises, private, or hybrid infrastructure for AI workloads, ensuring data security and privacy is critical. Additionally, 75% plan to or are considering integrating AI-powered PCs to boost operational efficiency, highlighting the sector's commitment to leveraging advanced AI technologies.

Survey Insights

Data quality issues are the **#1 inhibitor** causing AI projects to fall short of expectations.

Overall Infrastructure Deployment – Next 12 Months

- Public Cloud — **31%**
- Edge / Branch / Small Campus Locations — **20%**
- On-premises Private Cloud — **26%**
- Traditional on-premise data center / traditional hosted data center — **22%**

Primary Infrastructure Approach to AI Workloads

- **83%** — On-Premises / Private / Hybrid
- **17%** — Evaluating

What Do Organizations Seek in a Partner?

1	Support for data security & privacy
2	Infrastructure & hardware support for AI workloads
3	Support for data management
4	Depth of partnerships with AI solution providers (ISVs, alliance partners)

Next Gen Devices - AI-Powered PCs Adoption

- 9% — Extensively used
- 16% — Piloting
- 75% — Planning / Considering

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BFSI | Retail | Manufacturing | **Healthcare** | Government

Healthcare Overview

While the healthcare sectors across North America have significant differences, a shared goal for all healthcare organizations is improving patient outcomes. This involves enhancing the quality of care, ensuring patient safety, and providing personalized treatment through advanced technologies and data-driven insights. Healthcare organizations are prioritizing AI in 2025 to accelerate time to market, increase business agility, and drive innovation. With 34% planning to start using AI within the next year, generative AI use cases (53%) will be significant, creating new content and code. Success will depend on overcoming IT infrastructure costs and ensuring seamless integration with existing systems and processes.

Business Priorities for 2025

1. Accelerating time to market
2. Increasing business agility & responsiveness
3. Driving digital business innovation
4. Increasing revenues & profit growth
5. Enhancing decision making

Current AI Adoption

Adoption
- AI is **systematically adopted** across the enterprise — **3%**
- Supporting different **pilot** projects / use cases — **45%**
- **Early stages** of development / implementation — **10%**

Non-Adopters
- **Planning** to start using AI in the next 12 months — **34%**
- **Considering** or **evaluating** AI, but with no plans yet — **8%**

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	17%	13%
Interpretive AI	67%	34%
Generative AI	17%	53%

■ Past 12 Months   ■ Next 12 Months

Note: Only AI adopters were eligible to answer for the past 12 months.

Growth in AI as a % of IT Spend

3.7x

2024 → 2025

Business Functions Adopting AI Use Cases

1. Marketing
2. Cybersecurity
3. Customer service
4. Human resources
5. Software Development

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. IT infrastructure / network costs
2. Problems integrating AI with existing systems & processes
3. Data quality issues
4. Challenges scaling AI across the enterprise (including lack of departmental support)
5. Lack of budget or management buy-in

Top Factors for Successful AI Implementation Moving Forward

1. Availability of AI-powered PCs & edge devices
2. Ease of integrating AI with existing systems & processes
3. Availability of internal AI expertise
4. Access to adequate hybrid compute & storage resources
5. Employee training & upskilling

Lenovo-IDC CIO Playbook 2025 Survey by IDC, Healthcare n=62

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BFSI | Retail | Manufacturing | **Healthcare** | Government

Healthcare Overview (continued)

Healthcare is becoming increasingly data-centric. Critical data types for AI in healthcare include patient data for personalized treatment, clinical data for diagnostics and treatment planning, and operational data for optimizing healthcare delivery and reducing costs. It comes as no surprise that 35% of healthcare organizations are focused on developing data management capabilities in the next 12 months. Organizations also highlight that their primary infrastructure approach for AI workloads is mainly public cloud (48%), emphasizing scalability and flexibility. Additionally, 61% plan to or are considering integrating AI-powered PCs to boost operational efficiency, highlighting the sector's commitment to leveraging advanced AI technologies.
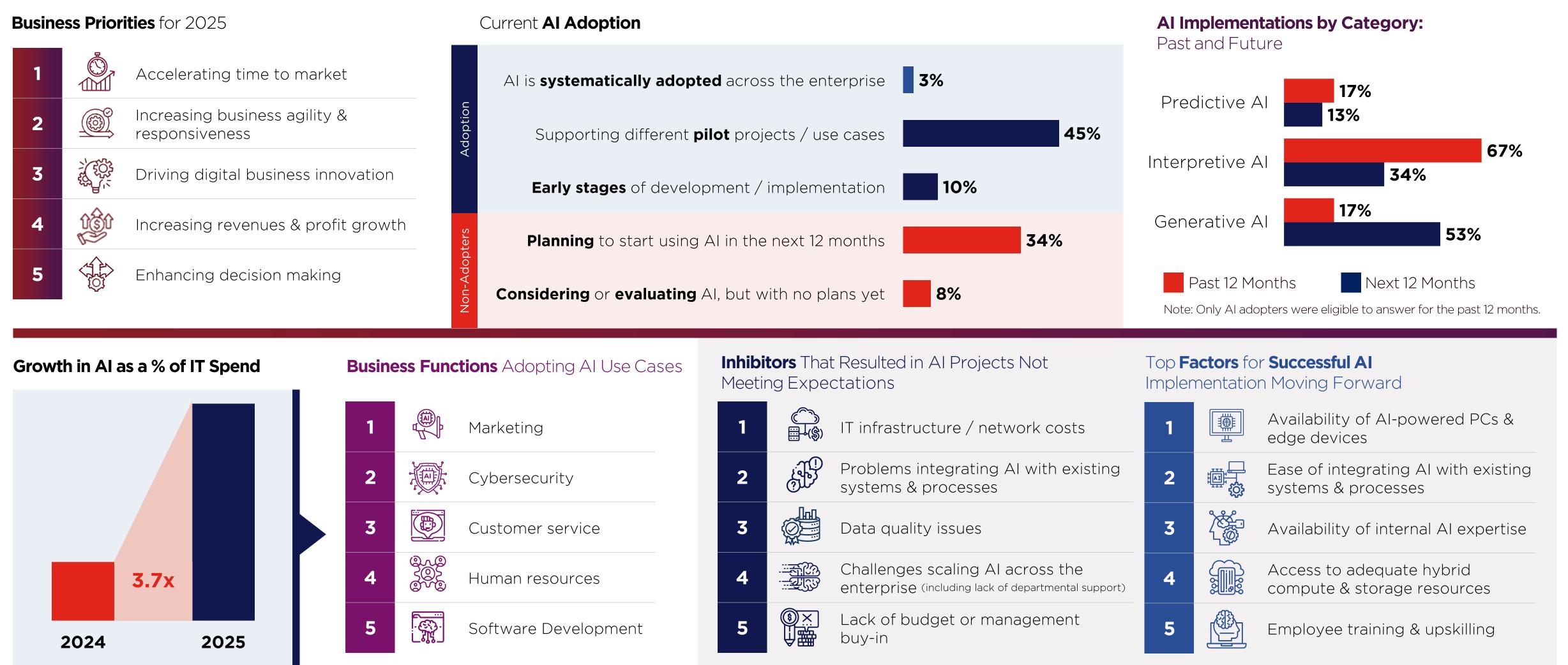
Survey Insights

35% of organizations highlighted that they will be developing **data management capabilities** in the next 12 months.

Overall **Infrastructure** Deployment – Next 12 Months

- Public Cloud — 31%
- Edge / Branch / Small Campus Locations — 18%
- On-premises Private Cloud — 25%
- Traditional on-premise data center / traditional hosted data center — 25%

Primary **Infrastructure** Approach to **AI Workloads**

- Public Cloud — 48%
- On-Premises / Private / Hybrid — 33%
- No standard approach — 7%
- Evaluating — 11%

What Do Organizations **Seek in a Partner**?

1. Support for AI modeling & development
2. Support for data management
3. Ability to help our organization deliver measurable business outcomes
4. Provision of as-a-service (i.e., SaaS / IaaS / PaaS) pricing & offerings

Next Gen Devices - **AI-Powered PCs** Adoption

- Extensively used — 8%
- Piloting — 29%
- Planning / Considering — 61%
- Not Considering — 2%

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BFSI | Retail | Manufacturing | Healthcare | Government

Government Overview

The vast and diverse government sector has multiple priorities, but chief among them is driving digital transformation to modernize processes and services. To help achieve this, governments are prioritizing improving customer / citizen experience, enhancing sustainability, and accelerating time to market through AI in 2025. With 35% planning to start using AI within the next 12 months, generative AI (61%) and interpretive AI (22%) are key focus areas, driven by a 3x increase in AI spending. Success will depend on overcoming data quality issues and ensuring seamless integration with existing systems and processes.

Business Priorities for 2025

1. Improving customer experience & satisfaction
2. Improving sustainability
3. Accelerating time to market
4. Improving employee productivity
5. Optimizing supply chain / inventory

Current AI Adoption

Adoption

AI is **systematically adopted** across the enterprise

Supporting different **pilot** projects / use cases — **14%**

Early stages of development / implementation — **20%**

Non-Adopters

Planning to start using AI in the next 12 months — **35%**

Considering or **evaluating** AI, but with no plans yet — **31%**

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	6%	18%
Interpretive AI	(bar)	22%
Generative AI	6%	61%

Past 12 Months | Next 12 Months

Note: Only AI adopters were eligible to answer for the past 12 months.

Growth in AI as a % of IT Spend

3.0x

2024 → 2025

Business Functions Adopting AI Use Cases

1. Customer service
2. Finance
3. Cybersecurity
4. Sales
5. IT Ops

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Data quality issues
2. Problems integrating AI with existing systems & processes
3. Challenges scaling AI across the enterprise (including lack of departmental support)
4. Lack of budget or management buy-in
5. Challenges deploying AI solutions at endpoints

Top Factors for Successful AI Implementation Moving Forward

1. Access to partners with strong AI capabilities
2. Ease of integrating AI with existing systems & processes
3. Availability of internal AI expertise
4. Availability of AI-powered PCs & edge devices
5. Access to adequate hybrid compute & storage resources

Lenovo-IDC CIO Playbook 2025 Survey by IDC, Government n=51

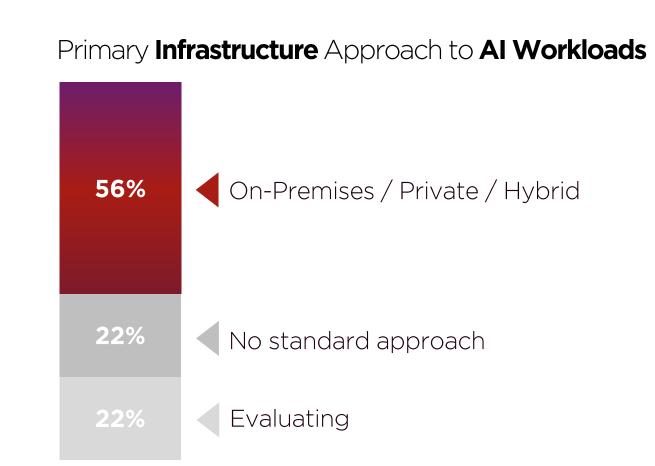| Introduction | CIO Strategic Imperatives | North America Insights | CIO Spotlight | Insights by Industries & Markets | Why Lenovo | Research Methodology |

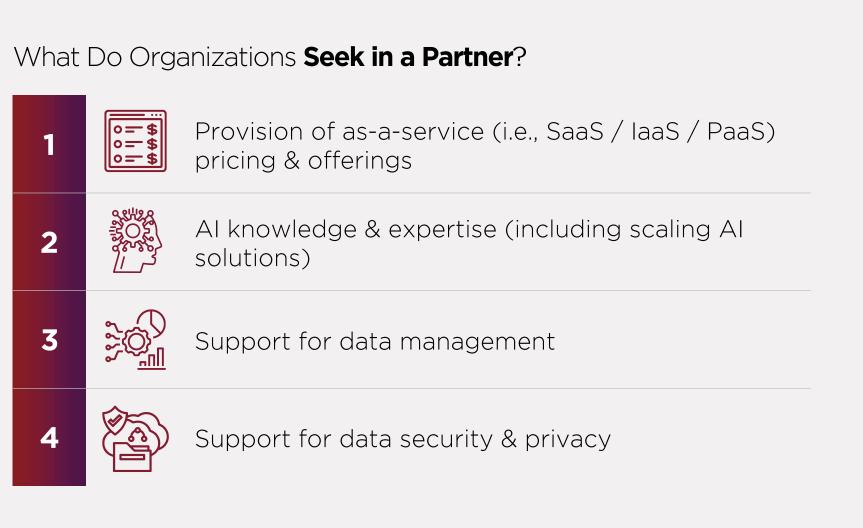BFSI | Retail | Manufacturing | Healthcare | **Government**
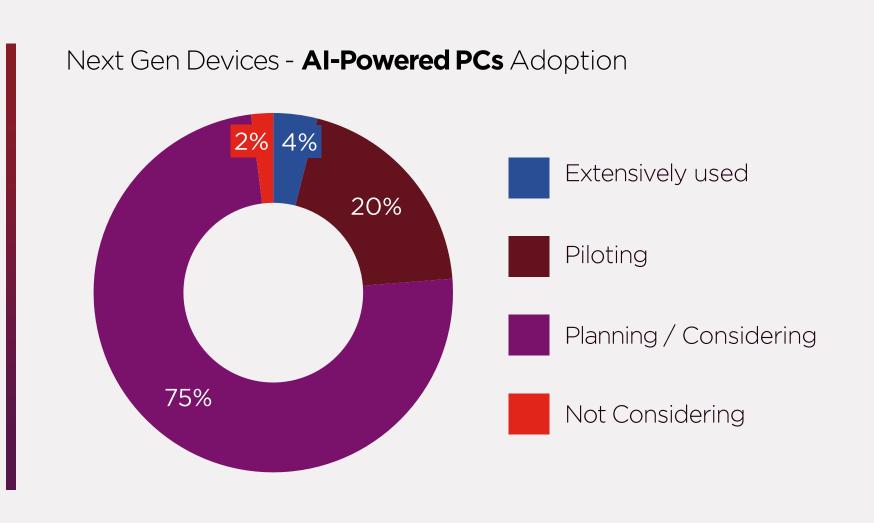
Government Overview (continued)

Critical data types for AI projects in government include citizen data for personalized services, operational data for improving efficiency and resource allocation, and security data for enhancing cybersecurity measures. As in other industries, data quality issues remain a primary inhibitor for AI projects in government, emphasizing the need for robust data management solutions. Notably, 56% of government organizations prefer to adopt on-premises, private, or hybrid infrastructure for AI workloads, indicating that scalability and security is a key consideration. Additionally, 75% plan to or are considering integrating AI-powered PCs to boost operational efficiency, highlighting the sector's commitment to leveraging advanced AI technologies.

Survey Insights

Data quality issues are the **#1 inhibitor** causing AI projects to fall short of expectations.

Overall **Infrastructure** Deployment – Next 12 Months

- Public Cloud — **30%**
- Edge / Branch / Small Campus Locations — **23%**
- On-premises Private Cloud — **25%**
- Traditional on-premise data center / traditional hosted data center — **22%**

Primary **Infrastructure** Approach to **AI Workloads**

- **56%** On-Premises / Private / Hybrid
- **22%** No standard approach
- **22%** Evaluating

What Do Organizations **Seek in a Partner**?

1. Provision of as-a-service (i.e., SaaS / IaaS / PaaS) pricing & offerings
2. AI knowledge & expertise (including scaling AI solutions)
3. Support for data management
4. Support for data security & privacy

Next Gen Devices - **AI-Powered PCs** Adoption

- 4% Extensively used
- 20% Piloting
- 75% Planning / Considering
- 2% Not Considering

Lenovo-IDC CIO Playbook 2025 Survey by IDC, Government n=51

Insights by
Markets

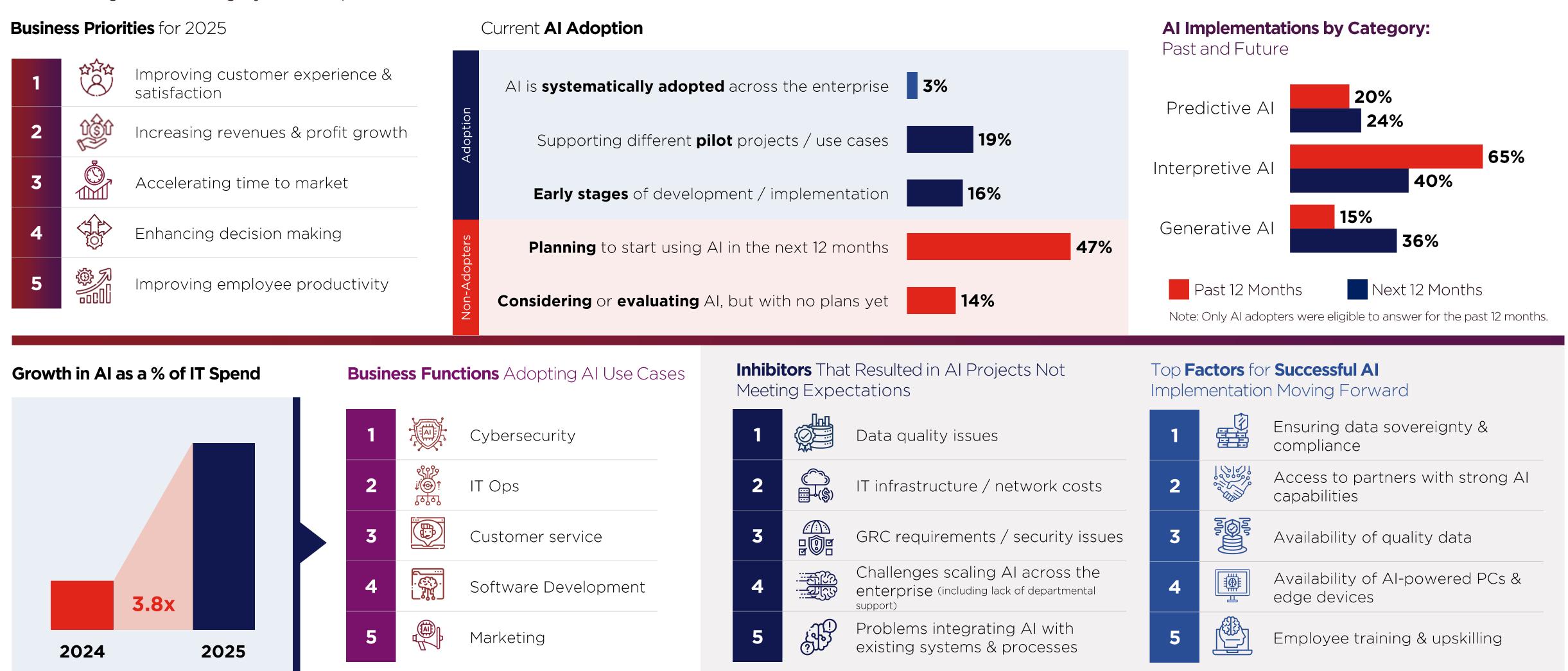| Introduction | CIO Strategic Imperatives | North America Insights | CIO Spotlight | Insights by Industries & Markets | Why Lenovo | Research Methodology |

United States | Canada

United States Overview

In 2025, U.S. businesses will prioritize enhancing customer experience, revenue growth, and accelerating time to market. AI technology will be crucial in achieving these goals, resulting in higher adoption, with 47% of organizations planning to adopt AI within the next year. AI's share of IT spending is also expected to surge, increasing approximately fourfold. While Interpretive AI will continue to be used widely, Generative AI adoption will grow **significantly**. Key success factors for AI initiatives will revolve on effectively addressing data quality issues and ensuring data sovereignty and compliance.

Business Priorities for 2025

1. Improving customer experience & satisfaction
2. Increasing revenues & profit growth
3. Accelerating time to market
4. Enhancing decision making
5. Improving employee productivity

Current AI Adoption

Adoption
- AI is **systematically adopted** across the enterprise — **3%**
- Supporting different **pilot** projects / use cases — **19%**
- **Early stages** of development / implementation — **16%**

Non-Adopters
- **Planning** to start using AI in the next 12 months — **47%**
- **Considering** or **evaluating** AI, but with no plans yet — **14%**

AI Implementations by Category: Past and Future

- Predictive AI — 20% (Past 12 Months), 24% (Next 12 Months)
- Interpretive AI — 65% (Past 12 Months), 40% (Next 12 Months)
- Generative AI — 15% (Past 12 Months), 36% (Next 12 Months)

Past 12 Months | Next 12 Months

Note: Only AI adopters were eligible to answer for the past 12 months.

Growth in AI as a % of IT Spend

3.8x
2024 → 2025

Business Functions Adopting AI Use Cases

1. Cybersecurity
2. IT Ops
3. Customer service
4. Software Development
5. Marketing

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Data quality issues
2. IT infrastructure / network costs
3. GRC requirements / security issues
4. Challenges scaling AI across the enterprise (including lack of departmental support)
5. Problems integrating AI with existing systems & processes

Top Factors for Successful AI Implementation Moving Forward

1. Ensuring data sovereignty & compliance
2. Access to partners with strong AI capabilities
3. Availability of quality data
4. Availability of AI-powered PCs & edge devices
5. Employee training & upskilling

Lenovo-IDC CIO Playbook 2025 Survey by IDC, United States n=700

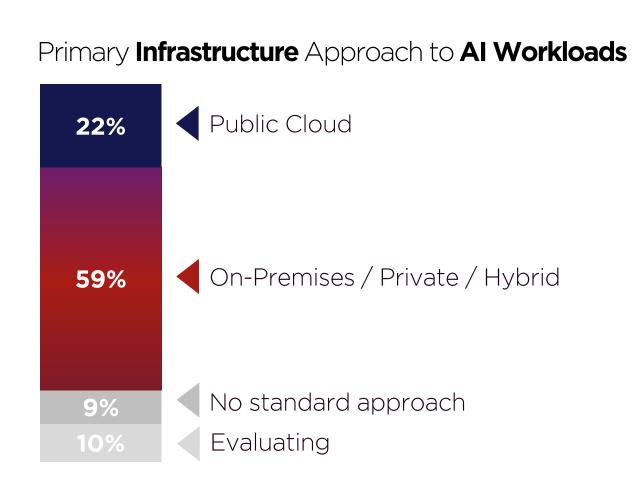| Introduction | CIO Strategic Imperatives | North America Insights | CIO Spotlight | Insights by Industries & Markets | Why Lenovo | Research Methodology |

United States | Canada
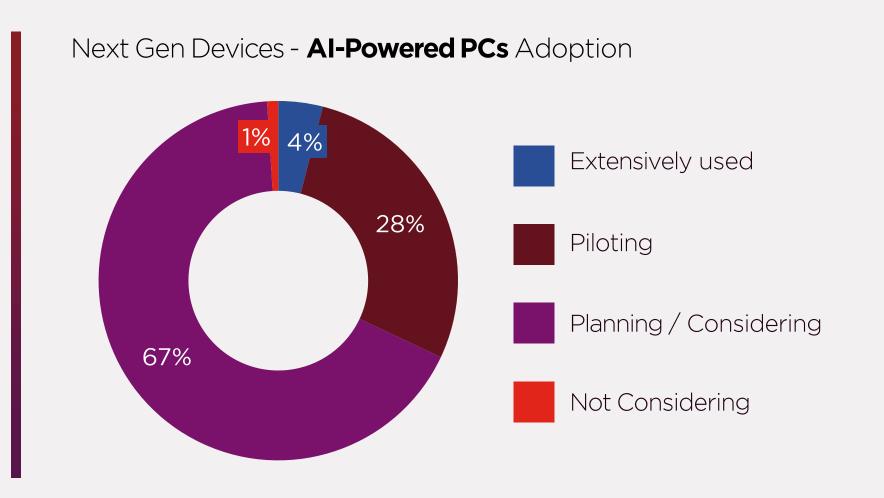
United States Overview (continued)

Data quality issues are the main barriers for AI projects in the U.S., highlighting the need for robust data management. Ensuring high-quality data is essential for facilitating enhanced, data-backed decision making, a key business priority. Most organizations are adopting on-premise, private, or hybrid infrastructure for AI workloads and relying on external support for critical elements such as data security and infrastructure management. Further, nearly all organizations are either planning to integrate, piloting or using AI-powered PCs to boost operational efficiency, demonstrating a strong commitment to leveraging advanced AI technologies for enhanced performance, productivity, and cost savings.

Survey Insights

Data quality issues are the **#1 inhibitor** causing AI projects to fall short of expectations.

Overall **Infrastructure** Deployment – Next 12 Months

- Public Cloud — **31%**
- Edge / Branch / Small Campus Locations — **21%**
- On-premises Private Cloud — **25%**
- Traditional on-premise data center / traditional hosted data center — **23%**

Primary **Infrastructure** Approach to **AI Workloads**

- **22%** Public Cloud
- **59%** On-Premises / Private / Hybrid
- **9%** No standard approach
- **10%** Evaluating

What Do Organizations **Seek in a Partner**?

1	Support for data management
2	Support for data security & privacy
3	AI knowledge & expertise (including scaling AI solutions)
4	Infrastructure & hardware support for AI workloads

Next Gen Devices - **AI-Powered PCs** Adoption

- 1%
- 4%
- 28%
- 67%

- Extensively used
- Piloting
- Planning / Considering
- Not Considering

Lenovo-IDC CIO Playbook 2025 Survey by IDC, United States n=700

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United States | **Canada**

Canada Overview

Nearly half of Canadian businesses have already adopted or are piloting AI and another 40% plan to adopt it within the next year to achieve key priorities such as enhanced decision-making, increased revenues, and improved customer experience. As a result, AI's share of IT spending is expected to more than double in 2025. Similar to the U.S., both Interpretive AI and Generative AI will be dominant technologies implemented by Canadian organizations; however, Generative AI is expected to outpace Interpretive AI in adoption. Despite high optimism, the success of AI initiatives will hinge on addressing data quality issues and ensuring the availability of internal AI expertise and AI-powered edge devices.
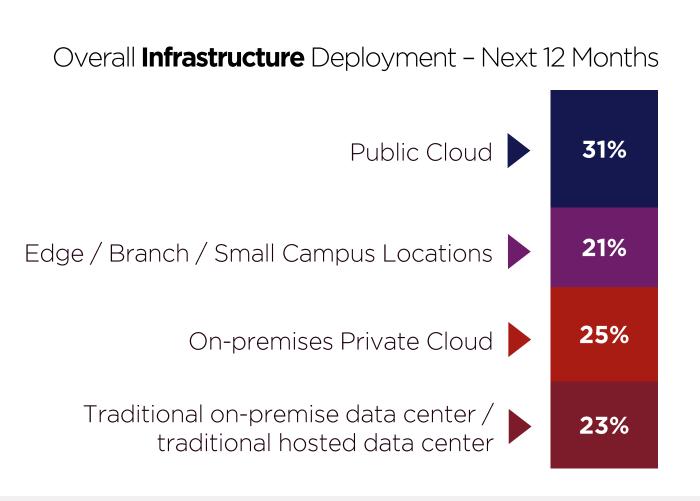
Business Priorities for 2025

1. Enhancing decision making
2. Increasing revenues & profit growth
3. Improving customer experience & satisfaction
4. Applying emerging AI technologies (e.g., generative AI)
5. Reducing business risk & cyber threats

Current AI Adoption

Adoption
- AI is **systematically adopted** across the enterprise — **2%**
- Supporting different **pilot** projects / use cases — **23%**
- **Early stages** of development / implementation — **26%**

Non-Adopters
- **Planning** to start using AI in the next 12 months — **40%**
- **Considering** or **evaluating** AI, but with no plans yet — **11%**

AI Implementations by Category: Past and Future

- Predictive AI: **44%** (Past 12 Months), **19%** (Next 12 Months)
- Interpretive AI: **53%** (Past 12 Months), **39%** (Next 12 Months)
- Generative AI: **3%** (Past 12 Months), **43%** (Next 12 Months)

Legend: ■ Past 12 Months ■ Next 12 Months

Note: Only AI adopters were eligible to answer for the past 12 months.

Growth in AI as a % of IT Spend

2.6x

2024 → 2025

Business Functions Adopting AI Use Cases

1. IT Ops
2. Marketing
3. Procurement
4. Cybersecurity
5. Finance

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Data quality issues
2. Application latency / performance issues
3. Challenges deploying AI solutions at endpoints
4. Unrealistic expectations from senior management
5. Challenges scaling AI across the enterprise (including lack of departmental support)

Top Factors for Successful AI Implementation Moving Forward

1. Availability of internal AI expertise
2. Availability of AI-powered PCs & edge devices
3. Adequate budget & management commitment
4. Employee training & upskilling
5. Access to adequate hybrid compute & storage resources

Lenovo-IDC CIO Playbook 2025 Survey by IDC, Canada n=200

Introduction | CIO Strategic Imperatives | North America Insights | CIO Spotlight | Insights by Industries & Markets | Why Lenovo | Research Methodology
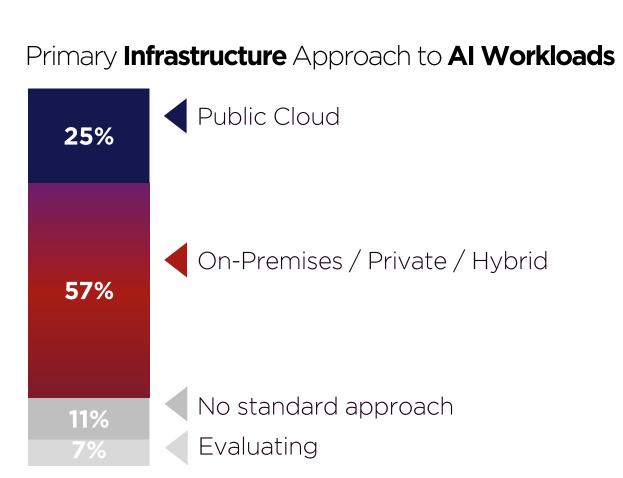
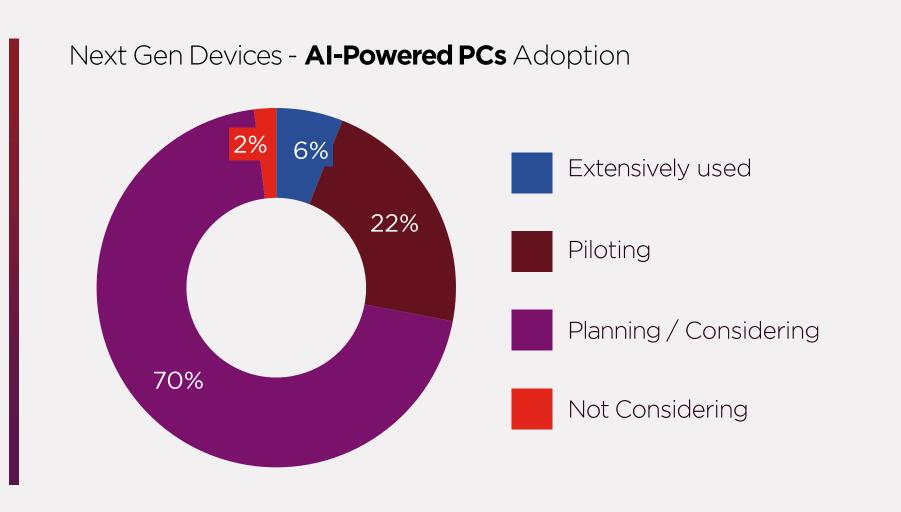United States | Canada

Canada Overview (continued)

Canadian organizations are looking to leverage technology partnerships to effectively manage their data, thereby alleviating data quality issues and improving decision-making capabilities, which is their top business priority. They seek expert support for managing their AI infrastructures, which are primarily deployed on-premise, or using private or hybrid models. Additionally, Canadian organizations recognize the advantages of AI-powered PCs in improving operational efficiency and productivity and driving cost savings, with majority considering piloting or leveraging AI-powered PCs.

Survey Insights

Data quality issues are the **#1 inhibitor** causing AI projects to fall short of expectations.

Overall **Infrastructure** Deployment – Next 12 Months

- Public Cloud — 31%
- Edge / Branch / Small Campus Locations — 21%
- On-premises Private Cloud — 25%
- Traditional on-premise data center / traditional hosted data center — 23%

Primary **Infrastructure** Approach to **AI Workloads**

- Public Cloud — 25%
- On-Premises / Private / Hybrid — 57%
- No standard approach — 11%
- Evaluating — 7%

What Do Organizations **Seek in a Partner**?

1. AI knowledge & expertise (including scaling AI solutions)
2. Support for data management
3. Provision of as-a-service (i.e., SaaS / IaaS / PaaS) pricing & offerings
4. Infrastructure & hardware support for AI workloads

Next Gen Devices - **AI-Powered PCs** Adoption

- Extensively used — 6%
- Piloting — 22%
- Planning / Considering — 70%
- Not Considering — 2%

Lenovo-IDC CIO Playbook 2025 Survey by IDC, Canada n=200

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NVIDIA Corporation, its subsidiaries and affiliates globally did not contribute in the research methodology, the development of research content, or the drafting of research questions for the 2025 CIO Global Study titled "It's Time for AI-nomics." The findings, interpretations, and conclusions expressed in this study are solely those of the authors and do not necessarily reflect the views of NVIDIA Corporation. NVIDIA Corporation assumes no responsibility or liability for any errors or omissions in the content of this study.

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Remove the barriers to ROI
with Lenovo Hybrid AI Advantage with NVIDIA

Deliver faster productivity, agility, and trust with AI – in short, bring AI to your enterprise and private data to drive innovation.

Lenovo Hybrid AI Advantage with NVIDIA delivers factory-like industrialization and reliability with a library of curated use case accelerators that allow organizations to deploy AI assistants and agents with minimal complexity.

Lenovo Hybrid AI Advantage with NVIDIA

Productivity
Enable humans to achieve more with functional and vertical AI agents and personalized experiences, delivering value across locations and hybrid workplaces.

Agility
Build, scale, and operate your hybrid AI factories quickly to reduce tech debt and drive operational efficiencies with modern AI infrastructure, devices, models, and services.

Trust
Achieve trusted, compliant, and responsible AI by managing and protecting your data and integrating validated solutions across your organization and ecosystem.

Lenovo and NVIDIA driving Hybrid AI in action

Combining AI with human expertise
Translated, leading provider of AI-powered language solutions, combines adaptive automatic translation services with the expertise of 500k native speakers worldwide.

Learn More

Making AI more accessible
Italian cloud provider Seeweb has partnered with Lenovo and NVIDIA to offer an innovative GPU-computing-as-a-service solution, enabling organizations to harness the power of AI and ML.

Learn More

Bringing AI with human customer service
Lenovo, NVIDIA, and DeepBrain offer an AI solution for customer service using an AI/human solution that creates a virtual employee that can serve customers within an AI-powered kiosk.

Learn More

Keeping parcels moving using AI
Peak Analytics transforms the supply chain industry with AI and image recognition solutions, identifying inventory problems at the source.

Learn More

Building a better cloud
Lenovo TruScale GPU as a Service allows the Mass Open Cloud Alliance to establish a powerful GPU cluster for groundbreaking research through a scalable pay-as-you go model.

Learn More

Discover everything you need to succeed with AI
www.lenovo.com/HybridAI
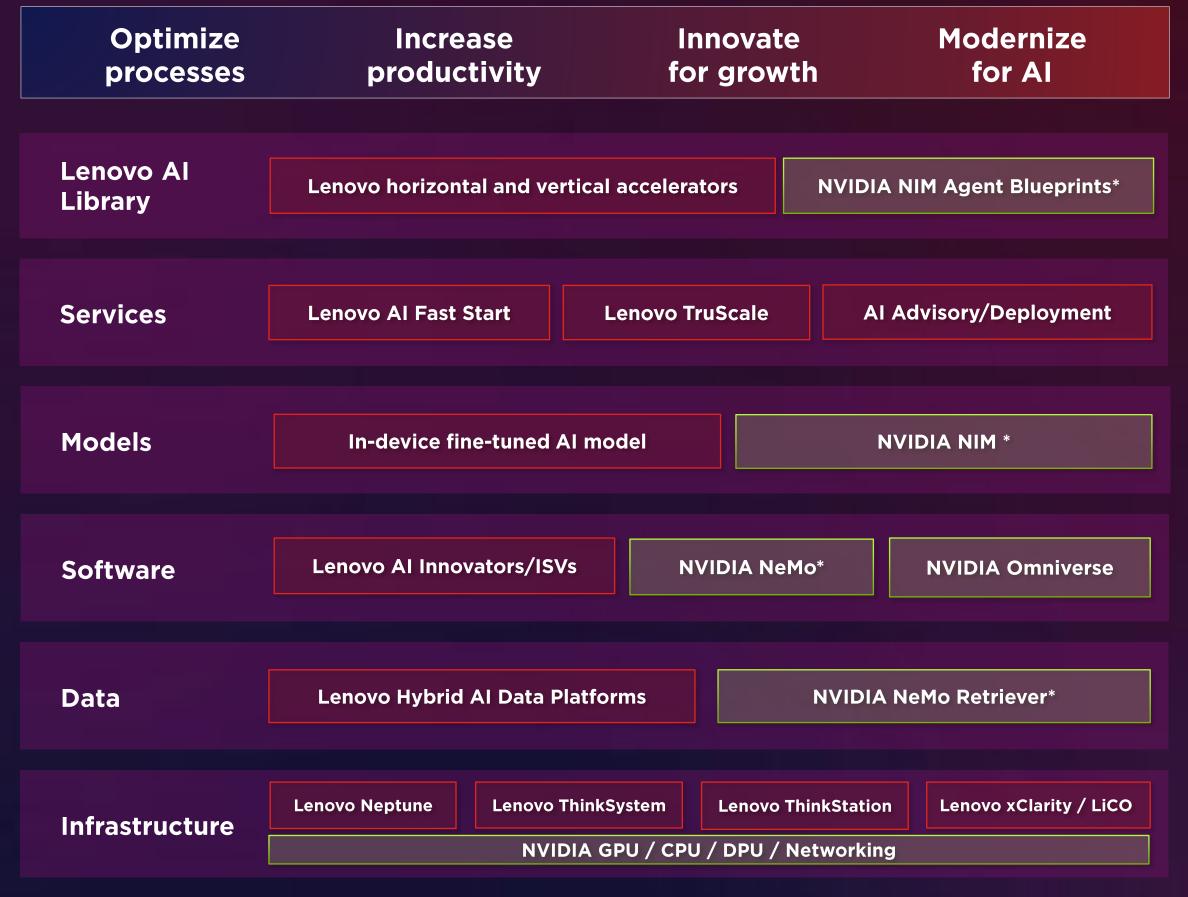
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The Lenovo Hybrid AI Advantage with NVIDIA

Turn intelligence into outcomes faster with agentic and physical AI with full stack solutions from Lenovo and NVIDIA. Learn more

Optimize processes	Increase productivity	Innovate for growth	Modernize for AI

Lenovo AI Library
Lenovo horizontal and vertical accelerators | NVIDIA NIM Agent Blueprints*

Services
Lenovo AI Fast Start | Lenovo TruScale | AI Advisory/Deployment

Models
In-device fine-tuned AI model | NVIDIA NIM *

Software
Lenovo AI Innovators/ISVs | NVIDIA NeMo* | NVIDIA Omniverse

Data
Lenovo Hybrid AI Data Platforms | NVIDIA NeMo Retriever*

Infrastructure
Lenovo Neptune | Lenovo ThinkSystem | Lenovo ThinkStation | Lenovo xClarity / LiCO
NVIDIA GPU / CPU / DPU / Networking

Framework as of January 2025

* Available with NVIDIA AI Enterprise

Services
Full lifecycle services

Advisory Services | Support Services | Managed Services | Deployment Services | TruScale (As-a Service)
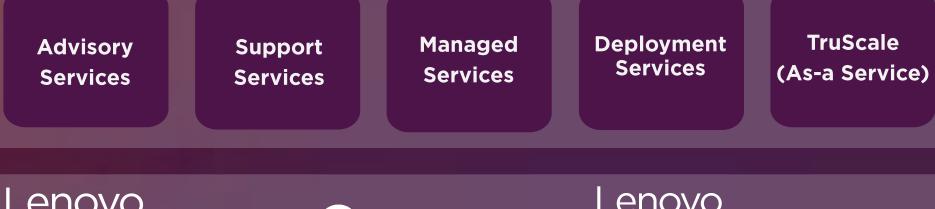
Devices
Powerful AI PCs, workstations, & phones for hybrid workplaces

Lenovo ThinkPad | motorola FOR BUSINESS | Lenovo ThinkStation

Edge
Get powerful data-center-like computing performance

Lenovo ThinkEdge

Datacenters
Energy efficient, high-performance compute & secure, right size AI Infrastructure & software

Lenovo ThinkAgile

Lenovo ThinkSystem

Neptune™

Discover everything you need to succeed with AI
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Research
Methodology

CIO Playbook 2025 Research Methodology

The playbook was developed based on **900 respondents**, with the following sampling breakdown:

Markets Covered	Sample Size
United States	**700**
Canada	**200**

Industries Covered	Sample Size
BFSI	**134**
Retail	**116**
Manufacturing	**100**
Healthcare	**55**
Government	**50**
Others	**445**

Sampling by Organization Role

420	480

■ C-Suite ■ C-1

Sampling by Employee Size

137	321	442

■ 250 to 999 employees
■ 1,000 to 4,999 employees
■ 5,000 or more employees