Lenovo

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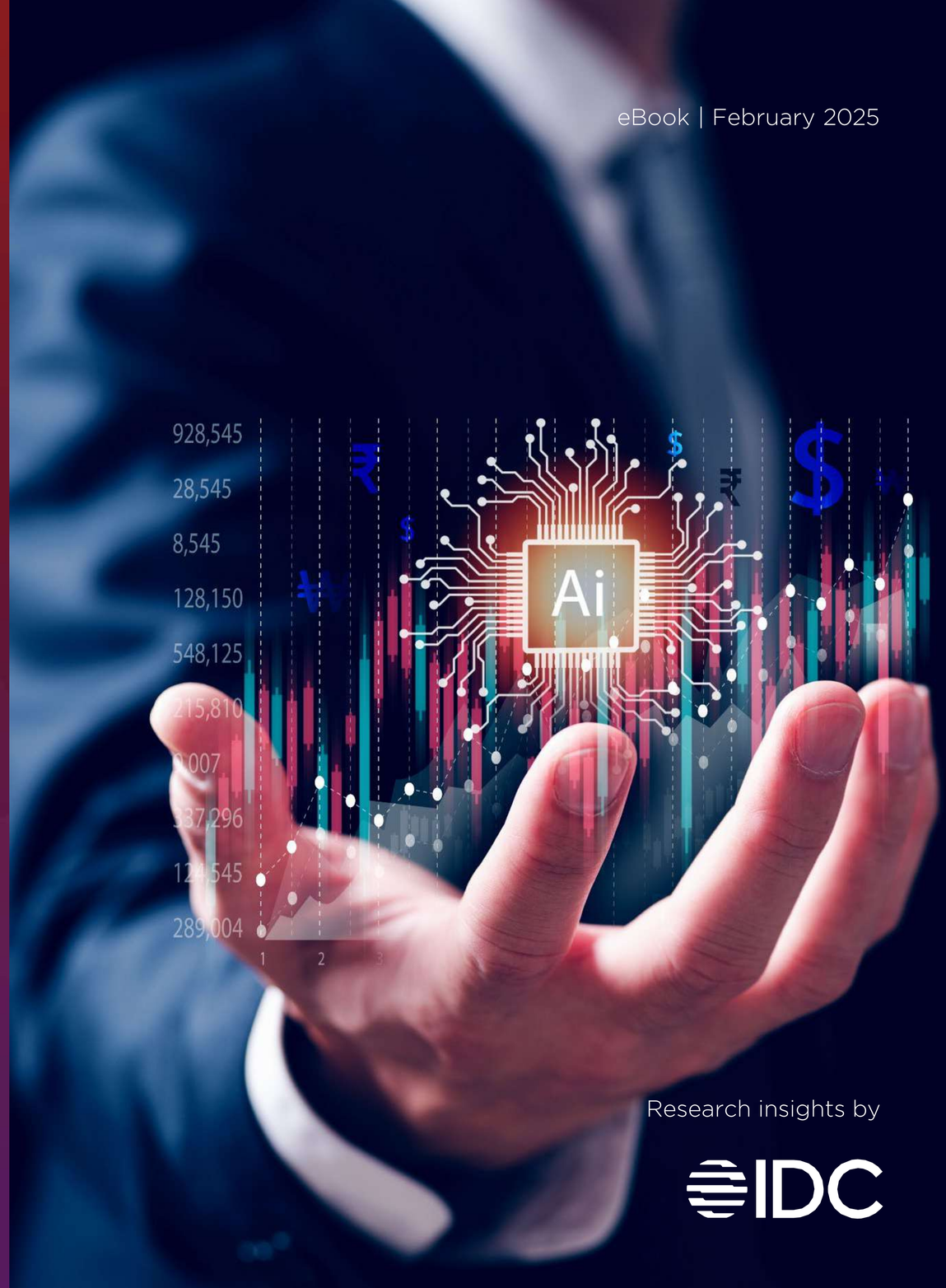
Europe and the Middle East

CIO Playbook 2025
It’s Time for AI-nomics



Research insights by

IDC

Introduction

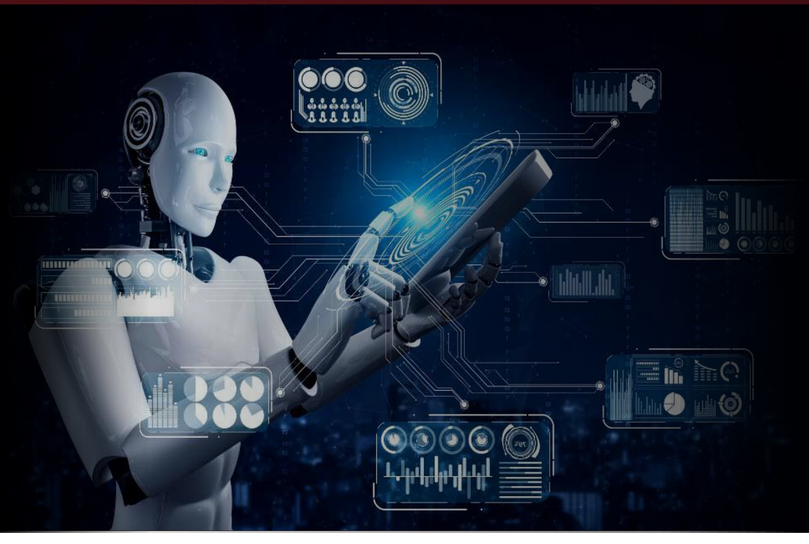
It's been one year since the last CIO Playbook, and Lenovo has once again engaged IDC to conduct a study to understand how organizations globally have fared with their AI journeys since. This eBook draws insights from custom research commissioned by Lenovo, surveying 620 IT and business decision-makers (ITBDMs) from mid-to-large organizations in Europe and the Middle East.

AI adoption in the region is undergoing a pivotal shift, as organizations transition from exploratory projects to scaling practical applications. It highlights how enterprises are aligning AI investments with tangible outcomes, focusing on operational efficiency, regulatory compliance, and innovation.

The research reveals a notable pivot toward Generative AI (GenAI), particularly in back-office functions such as IT operations and supply chain management, where measurable success has already been achieved. Organizations are no longer driven by fear of missing out (FOMO) but are instead making calculated investments that deliver productivity gains and streamline operations. These insights underscore a growing understanding of AI as a driver of both strategic and operational transformation.

Key findings emphasize the critical role of hybrid infrastructures and professional services in enabling scalable, secure, and efficient AI implementations. As CIOs navigate this evolving landscape, this playbook offers actionable guidance to address foundational challenges—such as data governance and skills gaps—and to ensure AI initiatives deliver maximum value. This resource is designed to help CIOs align AI strategies with business goals, fostering innovation while maintaining a focus on measurable outcomes.

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



CIO Strategic Imperatives

Here are some key insights from IDC's research involving 620 IT and business decision-makers (ITBDMs), along with considerations for CIOs for 2025:

	Insights	Considerations for CIOs for 2025
1	**FROM EMERGING TECHNOLOGY TO TANGIBLE BUSINESS OUTCOMES** EMEA organizations are progressing from merely focusing on adopting AI technology to strategically aligning AI investments with business value.	CIOs must partner with C-suite executives to create an AI vision that aligns with the long-term business strategy and planned business goals. The focus should be on building agreement around AI priorities and ensuring investments follow core business objectives. This requires establishing clear methods to measure business impact and designing organization-wide approaches that support AI adoption. **Action:** Collaborate with C-level stakeholders to define an enterprise-wide AI strategy that connects to business goals. Create a roadmap with success metrics, risk guidelines, and investment priorities. Establish a dedicated AI steering committee with key business leaders to guide strategic decisions and ensure C-suite support. Propose and develop value measures that combine financial and non-financial metrics for AI initiatives.
2	**GENERATIVE AI DRIVING AI INVESTMENT** 43% of AI investments in 2025 are set to be on GenAI implementations, with a focus on ITOps, marketing, and supply chain use cases.	As leaders responsible for organizations' technology strategy, CIOs must guide the more practical implementation of all AI types across business units. CIOs must take responsibility for coordinating teams, managing technical requirements, and ensuring efficient project delivery. This involves working with business heads to identify specific GenAI use cases, assess technical feasibility, and ensure proper resource allocation for successful deployment. **Action:** Create detailed implementation plans that include resource requirements, technical specifications, and success metrics for each use case. Establish clear processes for scaling successful AI pilots to production environments. Implement tools and processes to track AI performance, usage, and impact across individual deployments.
3	**BUILDING A SOLID BASE FOR AI** AI spending is set to grow by 104%, with a focus on AI models development and management, AI platforms and infrastructure needed to build and run AI.	Consider adopting future-proof IT ecosystems by investing in scalable, secure, and AI-ready infrastructure. CIOs must ensure that ground elements like software platforms, computing resources, and networking capabilities can support both current and future AI workloads. **Action:** Create a roadmap for upgrading data and AI infrastructure, ensuring interoperability. Partner with technology providers and internal stakeholders to establish a reliable platform that can scale with growing AI adoption while maintaining security and operational excellence. Leverage AI governance and collaborate with other stakeholders to ensure data quality, compliance, and ethical use.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

CIO Strategic Imperatives (continued)

Here are some key insights from IDC's research involving 620 IT and business decision-makers (ITBDMs), along with considerations for CIOs for 2025:

	Insights	Considerations for CIOs for 2025
4	**TACKLING DATA CHALLENGES TO BOOST AI** Poor data quality is a major obstacle for AI success, driving organizations to prioritize governance, data management, and analytics capabilities.	Depending on their role in data management in a company, CIOs should together with other stakeholders take steps to ensure that organizational data is accurate, consistent, well-structured, and accessible, thus building a reliable foundation for successful AI initiatives and driving actionable insights. **Action:** Invest in data platforms, implement strong data governance frameworks to enhance data quality, security, and compliance. Agree on accountability for data quality. Implement AI-driven data observability and governance to automate quality checks and compliance. Support upskilling teams in advanced data analytics for AI-driven decision-making and innovation.
5	**PARTNERS TO SUPERCHARGE AI INITIATIVES** Almost all EMEA organizations surveyed are either exploring, planning or will continue to rely on external service providers for successful AI implementation.	CIOs recognize that strategic partnerships with external providers will be critical to accelerate AI deployment. CIOs must focus on selecting partners that align with organizational goals and provide flexibility for evolving needs. **Action:** Establish clear SLAs and KPIs with AI service providers. Ensure knowledge transfer and build internal AI expertise to reduce dependency over time.
6	**FOR AI, HYBRID INFRASTRUCTURE IS KEY** 65% of organizations have highlighted that their AI workloads will primarily be on-prem or hybrid.	Hybrid AI strategies will dominate, requiring CIOs to balance cloud scalability with on-premises control. Data sensitivity, latency requirements, and regulatory compliance will drive decisions. **Action:** Adopt hybrid architectures that allow seamless movement of workloads between environments. Prioritize on-premise solutions for sensitive AI workloads or those with strict latency and compliance requirements.
7	**THE NEXT GEN OF AI DEVICES IS HERE** 43% of organizations believe that AI-powered devices boost employee productivity and experience. As a result, 89% are piloting, planning, or exploring AI-powered PC rollouts in the near future.	Empower the workforce with AI-enhanced tools to drive productivity and innovation. CIOs must oversee pilots to assess usability and ROI while addressing employee training and support needs. **Action:** Pilot AI-powered PCs in departments where automation and productivity gains are most critical. Address potential adoption barriers by providing training and demonstrating clear value to employees.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

Europe & Middle East Insights

From Emerging Technology to Tangible Business Outcomes: 2025 Business Priorities

Business Priorities - EMEA	2024	2025	YoY Change
Optimizing supply chain/inventory	6	1	+5
Driving digital business innovation	4	2	+2
Improving regulatory compliance	11	3	+8
Improving employee productivity	9	4	+5
Increasing revenues & profit growth	7	5	+2
Applying emerging AI technologies (e.g., GenAI)	2	6	-4

- The research identified a shift in business priorities for 2025, with a greater focus on operational challenges. Key issues organizations aim to address include:

  - product development delays,
  - supply chain disruptions,
  - and gaps in cybersecurity/data privacy,

  marking a move from customer-centric strategies to internal operational concerns.

- As a result, businesses will prioritize supply chain and inventory optimization, regulatory compliance, and digital innovation—all highly relevant to AI adoption and implementation. This shift also indicates that Generative AI (GenAI) is no longer "emerging" and its adoption is driven by tangible outcomes rather than a fear of missing out (FOMO).

Considerations for CIOs

Organizations have moved past the hype phase. Today, the focus has shifted to creating tangible business value. AI's role is not just to keep pace with competitors but to address internal inefficiencies, respond to market dynamics, and future-proof operations. Organizations leveraging AI successfully are those that prioritize clear objectives.

CIOs must align AI investments with clear business priorities such as compliance, employee productivity, and business agility, ensuring that every deployment drives measurable outcomes and builds resilience for evolving market demands.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

From Emerging Technology to Tangible Business Outcomes: Companies Adopting AI at Various Pace

IDC Observation
Close to 1/3 of business respondents surveyed have yet to adopt AI but are in the "planning" stage.

Considering or **evaluating** AI, but with no plans — **9%**

Planning to start using AI in the next 12 months — **26%**

Non-Adopters of AI

35% of EMEA organizations surveyed have not yet adopted AI but are evaluating or planning AI investments. This aligns with IDC's observations, where a minority of organizations are adopting a "wait and see" approach to AI. However, the majority of non-adopters are in the planning stage, underscoring a strong recognition of AI's potential and suggesting that substantial investments are forthcoming.

Early stages of development/implementation — **30%**

Supporting different **pilot** projects/use cases — **29%**

AI is **systematically adopted** across the enterprise — **6%**

Adopters

The survey also found that a significant majority of AI adopters remain in the initial stages of development or piloting. This aligns with IDC's other research, which observed a high number of experiments and proof-of-concepts, but few reaching production and even fewer deemed successful.

Supplementary Insights

41 AI POCs ▶ **5** AI Production Launches

Source: IDC FERS Wave 4 Survey, 2024

This underscores the market's lack of maturity, characterized by widespread experimentation. However, this is expected to change rapidly in the next 12 to 24 months as more success stories emerge, prompting organizations to follow suit.

IDC Observation

The divide between adopters and non-adopters reveals a key insight: hesitation isn't due to lack of interest but rather uncertainty around execution.

For adopters, early investments might have yielded promising results, demonstrating that small, focused pilots can pave the way for enterprise-wide rollouts. Non-adopters, meanwhile, can draw lessons from these success stories. For example, starting with well-defined use cases—like IT operations or customer service optimization—can lower barriers to entry. Taking a "wait-and-see" approach risks falling behind as competitors gain first-mover advantages.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

From Emerging Technology to Tangible Business Outcomes: Overcoming Hurdles for Non-Adopters

Top Challenges Holding Organizations Back from Adopting AI
Non-Adopters of AI

by **IT Respondents**

1	Limited budget or financial resources
2	Potential for unethical use of AI
3	Lack of skilled personnel or expertise
4	Concerns about data security
5	No current business need or priority for AI

by **Business Respondents**

1	No current business need or priority for AI
2	Lack of the necessary data to implement AI
3	Limited budget or financial resources
4	Concerns about data security
5	Lack of skilled personnel or expertise

- **Business Need vs. Technical Readiness:** Business respondents rank "no current business need or priority for AI" as their top challenge, reflecting skepticism about AI's alignment with business goals or its relevance to existing operations. IT places this lower in priority, indicating their readiness to explore AI but perhaps facing resistance from business units to integrate AI into workflows.
- **Budget Constraints:** Both groups cite "limited budget or financial resources" as a significant barrier, but for business, this likely reflects hesitation to invest without clear ROI, while IT may view it as a limitation to upgrading infrastructure or acquiring necessary tools.
- **Data Challenges:** Business users highlight "lack of necessary data" as a major inhibitor, suggesting gaps in the availability or organization of data required to implement AI effectively. IT does not emphasize this as strongly, indicating that they might believe the data exists but isn't being utilized properly by the business. Both see data security as a challenge although they might take a slightly different view on this: business users are understandably much more concerned about data privacy and compliance, while IT focuses more on accessibility and protection against unauthorized use or data leakage.
- **Expertise and Skills:** Both IT and business point to a "lack of skilled personnel or expertise," but the emphasis for IT is likely on technical AI development and deployment, whereas for business users, it may focus on understanding how to apply AI to business problems effectively.
- **Ethical and Security Concerns:** IT highlights "potential for unethical use of AI" more prominently, reflecting their role in ensuring responsible AI development and compliance. Both groups share concerns about data security, but IT's focus is likely on technical safeguards, while business users may worry about reputational risks.

Considerations for CIOs

CIOs must bridge the gap between IT's technical readiness and business stakeholder's skepticism by:

- **Building Business Cases:** Work with line-of-business (LoB) leaders to identify specific use cases where AI can add measurable value, demonstrating ROI to address concerns about business need and budget.
- **Fostering Collaboration:** Facilitate cross-functional teams to align IT's capabilities with LoB's goals, ensuring data accessibility and relevance for AI projects.
- **Investing in Skills:** Prioritize workforce development for both IT and LoB, focusing on technical training for IT and practical AI application knowledge for LoB.
- **Addressing Ethical and Security Concerns:** Establish clear governance frameworks to ensure responsible AI use, balancing technical safeguards with business transparency to build trust.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

From Emerging Technology to Tangible Business Outcomes: Despite Doubts, Most AI Implementations Meet Expectations

Management Sentiment towards AI (All Respondents)

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

While the majority of organizations are generally positive or enthusiastic about AI, a significant segment (45%) still harbors doubts. Unsurprisingly, there are more non-adopters with negative sentiment towards AI than adopters. Despite some non-adopters holding a positive view of AI, many of them may be adopting a 'wait and see' approach. They may also face internal inhibitors that need to be overcome before embarking on the AI journey.

Has AI Met Expectations of AI Adopters?

- 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.

IT Ops
Top Use Cases

- **FinOps** use cases

Engineering/R&D
Top Use Cases

- **Product R&D** use cases
- **Product compliance, simulation & quality** use cases

Software Development
Top Use Cases

- **DevOps** use cases
- **Development** use cases

- Nearly all adopters reported that AI has either met or exceeded their expectations. Those most satisfied with AI, particularly those who indicated that AI has exceeded their expectations, have seen the most success in back-office use cases such as IT operations, engineering/R&D, and software development. This should provide food for thought for those still uncertain and waiting to act, encouraging them to take the leap and consider which areas to focus on.
- For the 45% of organizations still uncertain, this is a pivotal moment to reconsider their stance. The proven successes in various business areas provide a compelling argument for action. Starting small, leveraging existing datasets, and focusing on incremental improvements can help overcome internal inhibitors. Furthermore, engaging external partners or consulting services may ease the transition for those lacking in-house expertise.

Considerations for CIOs

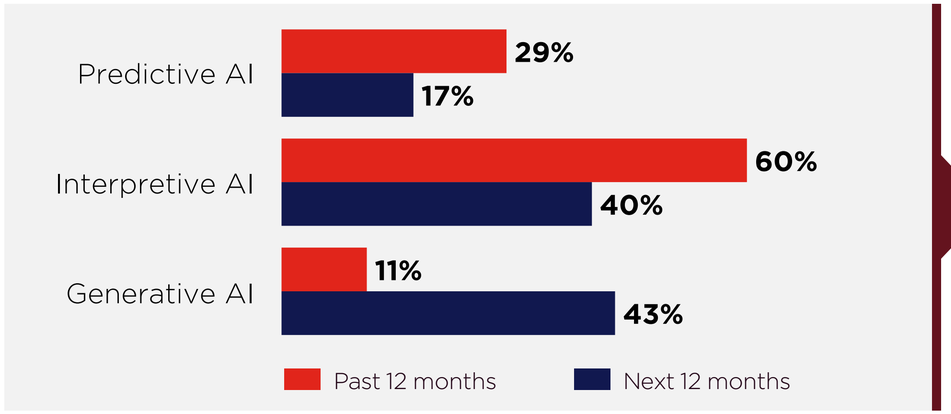
Given the high success with IT-related use-cases, CIOs should lead by example and communicate that internally to build awareness.

CIOs can run targeted workshops or pilot programs to overcome skepticism, highlighting measurable and scalable results in IT and R&D. Sharing success stories within their organizations can build momentum for AI initiatives, even in less popular functions when considering the application of AI such as legal, sales, and HR.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, EMEA n=620

Generative AI Driving AI Investments: Fueling Implementation in both Technology and Business Focused Use Cases

AI Category in Focus: Past and Future



Business Functions Adopting AI Use Cases

Top Use Cases Adopted by Business Functions

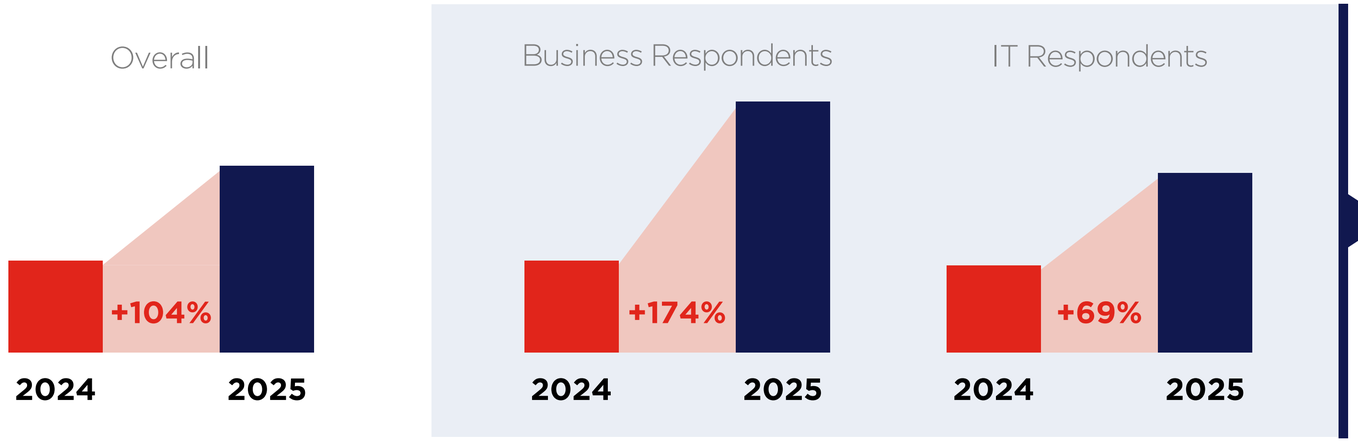
1	IT Ops	• Service automation use cases • FinOps use cases
2	Marketing	• Web marketing use cases • Marketing operations use cases
3	Supply Chain	• Factory floor use cases • Warehousing/inventory use cases
4	Engineering/R&D	• Product R&D use cases • Product design use cases
5	Cybersecurity	• Application security use cases • Security operations use cases

- Over the past couple of years, there has been significant hype around GenAI. However, AI implementation among enterprises has continued to primarily focus on predictive and interpretive AI. Survey results indicate a shift in the next 12 months, with 43% of organizations in EMEA planning to invest in GenAI use cases. This move is largely driven by existing AI adopters who are now more confident in implementing GenAI.
- Although the percentage share of AI budget dedicated to more traditional types of AI may decrease, companies will still continue to increase spending in this areas as overall AI budgets are to grow significantly in years to come.
- Organizations also highlighted key areas for AI implementation, particularly in back-office functions such as IT operations, supply chain, cybersecurity, and engineering/R&D, where AI-driven automation and optimization are highly beneficial. Marketing is an exception to the back-office focus, with EMEA organizations focusing on applying AI in various marketing operations.
- Companies are increasingly investing in GenAI to enhance R&D, automate repetitive tasks, and individualize interactions. For instance, engineering teams use GenAI for rapid prototyping and simulation, reducing time-to-market. Marketing departments are deploying GenAI to create personalized campaigns. These real-life applications highlight the need for CIOs to evaluate where GenAI can deliver the most value within their operations, ensuring that investments align with strategic business goals rather than chasing trends.
- While IT has slightly higher adoption of predictive and interpretive AI, business users have a higher adoption rate for generative AI. This suggests that business users are finding generative AI models to be more accessible and beneficial to their day-to-day work. The higher business adoption indicates that generative AI is enabling non-IT employees to leverage AI capabilities more easily, without relying as heavily on IT support.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

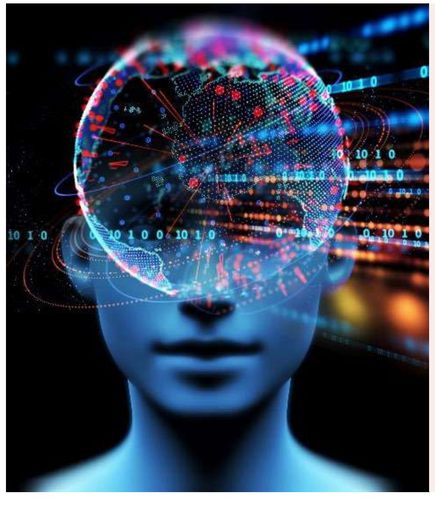
Building a solid base for AI: Leveraging Models and Platforms for Success

Growth in AI as a % of IT Spend



Top AI Investments in the Next 12 Months

1. Developing AI models & AI model management
2. Machine learning & deep learning platforms
3. Data center & edge AI infrastructure
4. AI embedded applications
5. IT consulting & services for AI projects



- Organizations plan to allocate nearly 20% of their IT budgets to AI in 2025, representing a 104% increase from 2024. This significant shift underscores the growing importance of AI, especially considering that the majority of IT budgets are typically dedicated to maintaining existing operations.
- AI spending in EMEA is expected to almost double in 2025. This reflects a region-wide acknowledgment of AI as a strategic priority rather than a fringe investment. The fact that non-IT personnel are increasingly driving this interest highlights the cross-functional value of AI across operations, marketing, finance, and other domains. This also suggests a shift in AI's role from a technical tool to a core enabler of business transformation.
- Companies are investing in AI by targeting specific areas that promise real business value. They're planning to focus on AI model development, cloud infrastructure, and applications that can result in cutting costs and generating new revenue streams. IT consultants and services are becoming critical in turning AI's potential into action that can deliver measurable business impact.

Considerations for CIOs

CIOs need to prepare their organizations for AI by doing four key things: get better data science tools, upgrade infrastructure platforms to handle AI, improve how data is managed, and build AI platforms that can grow with the business. This means CIOs must break out of their usual IT team and work directly with data teams and business leaders to make AI successful.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

Building a solid base for AI: Bridging the Skills Gap and Overcoming Data Challenges

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

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

- Key success factors for AI projects highlighted in the research emphasize both practical and strategic challenges faced by organizations when implementing AI.
- Organizations understand that ensuring data sovereignty and compliance is critical not only for meeting demanding regulatory requirements, especially in Europe, but also for maintaining control over potentially sensitive data and fostering trust.
- Easy integration with existing systems and processes is equally vital. Organizations need AI to work alongside their current technologies without disrupting operations.
- Lastly, the availability of high-quality data is fundamental, as AI can only deliver valuable insights when trained and working on clean, comprehensive, and reliable datasets.

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. IT infrastructure/network costs
4. Lack of budget or management buy-in
5. Application latency/performance issues

- Difficulties in scaling AI across the organization was cited as the top inhibitor to successful AI implementation, often hindered by insufficient LoB support and disconnected adoption strategies. Without cross-functional alignment, efforts frequently remain isolated and fail to drive organization-wide impact.
- As highlighted in the success factors, data quality issues continue to represent a significant obstacle, undermining the accuracy and reliability of AI outcomes.
- High IT infrastructure and network costs were also highlighted as a key challenge, which further complicate scaling efforts. AI initiatives require investment in both technology and talent, yet they often compete for resources with other business priorities. Without a clear business case and management support, AI efforts may fail or at least be deprioritized.

Considerations for CIOs

CIOs need to help break down departmental barriers by supporting cross-functional AI teams. To drive adoption, CIOs should engage in developing a centralized AI strategy that links technology investments directly to business outcomes.

Data governance and compliance may be ensured with the help of automated tools that can classify sensitive data, enforce access controls, and generate comprehensive audit trails.

To improve data quality and infrastructure performance, CIOs should invest in AI-driven data validation technologies and adopt a multi-model infrastructure approach. This includes using a combination of cloud-native solutions, edge computing for low-latency processing, and hybrid systems that balance performance and compliance.

Simultaneously, they need to run targeted pilot projects to demonstrate quick wins to secure management buy-in, and invest in specialized employee training to build AI capabilities across the organization.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

Building a solid base for AI: Bridging the Skills Gap and Overcoming Data Challenges (Continued)

IT Respondents

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

1	Ensuring data sovereignty & compliance
2	Ease of integrating AI with existing systems & processes
3	Access to partners with strong AI capabilities
4	Employee training & upskilling
5	Availability of quality data

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1	IT infrastructure/network costs
2	Challenges scaling AI across the enterprise
3	Application latency/ performance issues
4	Unavailability or cost of AI expertise
5	Lack of budget or management buy-in

- IT teams focus heavily on technical enablers such as ensuring data sovereignty and compliance, facilitating AI integration with systems, and ensuring the availability of quality data. Partnering with external AI experts is also a significant priority for IT.
- IT is primarily hindered by infrastructure and operational costs, scalability issues due to limited departmental support, and technical problems like application latency and performance. These challenges reflect IT's role in managing the underlying technology stack for AI projects.

Business Respondents

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

1	Availability of quality data
2	Employee training & upskilling
3	Availability of internal AI expertise
4	Ensuring data sovereignty & compliance
5	Ease of integrating AI with existing systems & processes

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1	Data quality issues
2	Challenges scaling AI across the enterprise
3	Lack of budget or management buy-in
4	GRC requirements/security issues
5	Problems integrating AI with existing systems & processes

- Business users emphasize people-centric enablers, including employee training, upskilling, and building internal AI expertise. While data sovereignty and integration ease are important, their focus on workforce readiness sets them apart from IT.
- Business users struggle with process and organizational issues, such as integrating AI into existing systems, lack of budget or buy-in, and governance or compliance (GRC) hurdles. Their concerns reflect the need for AI to align with business workflows and strategic objectives. Poor data quality, such as incomplete or outdated data, often undermines AI effectiveness, leading to flawed insights and reduced trust. From a business perspective, ensuring quality data is essential for delivering business impact and achieving reliable, AI-driven outcomes.

Considerations for CIOs

CIOs need to bridge the gap between IT and business by aligning both on shared objectives for AI, balancing technical readiness with workforce and process adjustments. They need to prioritize initiatives that improve data governance and accessibility across the enterprise.

It is helpful to establish a clear roadmap for scaling AI across teams with cross-functional collaboration and proactively demonstrate AI's value to the leadership team, emphasizing both technical feasibility and possible business results.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

Building a solid base for AI: Path to Effective Governance and Risk Management

Survey Insights

Improving regulatory compliance is the **3rd highest business priority** for EMEA organizations in 2025.

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

Most Important Aspects of AI-related GRC

1. Explainable AI & transparency
2. Greater AI accountability & reliability
3. Improved model governance & policy control
4. Enhanced AI privacy & security
5. Ethical AI frameworks

- Data on AI GRC policies reveals a nuanced picture of organizational readiness. Most organizations are in an intermediate stage of policy development, with only a small percentage having fully enforced enterprise AI GRC policies.

Adopters vs. Non Adopters

The divide between AI adopters and non-adopters is stark. Adopters show more engagement in policy development, with higher rates of policy creation and limited enforcement. Non-adopters exhibit greater resistance, with many having no plans for AI GRC policies. This indicates a growing technological and strategic gap between organizations embracing AI and those on the sidelines.

IT vs. Business

Business departments have the highest proportion of policies with limited enforcement, while IT departments are most proactive in developing comprehensive guidelines. This variation indicates potential internal fragmentation in AI governance strategies. The discrepancy suggests organizations lack a unified approach to AI governance, with different departments viewing risk, compliance, and technological innovation differently. This misalignment could hinder effective AI implementation and create organizational vulnerabilities.

- Organizations struggle to implement comprehensive policies due to the rapid evolution of AI technologies and uncertainty about potential risks. Developing robust, adaptable governance frameworks is becoming a key competitive differentiator, separating organizations that can responsibly innovate from those still navigating AI integration complexities.
- Moving forward, organizations can navigate AI governance challenges by partnering with service providers offering pre-built governance frameworks, risk assessment tools, or compliance monitoring solutions tailored to specific industry needs. These partnerships can bridge the gap between IT and business departments, accelerating the development and implementation of comprehensive AI GRC policies. This approach is particularly beneficial for organizations in the early stages of policy development or those struggling with enforcement.

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

Tackling Data Challenges to Boost AI Success

Survey Insights

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

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

Data science and **analytics skills** are among the top 3 areas that **organizations will prioritize** for development over the next 12 months.

- The data quality as the second-highest inhibitor of AI success reveals a gap between ambition and execution in AI initiatives. Organizations underestimate the groundwork needed to ensure their data is accurate, consistent, and properly structured. The fact that data quality ranks as the #2 inhibitor shows how even sophisticated AI models fail without reliable data foundations.
- The commitment of EMEA organizations to developing data management capabilities shows recognition that AI success requires more than advanced algorithms. This investment signals learning from early AI challenges where projects failed due to inadequate data infrastructure. The focus suggests a maturing approach where companies prioritize the basic elements needed for AI success.
- The prioritization of data science and analytics skills demonstrates that organizations understand the key role of human expertise in AI adoption. While AI tools are becoming more accessible, effectively leveraging these tools and translating insights into business value requires specialized expertise. This capability development will position EMEA organizations to better deploy AI solutions and validate AI-driven decisions.

Considerations for CIOs

Considerations may differ depending on a CIO's role in data management in each company.

CIOs with direct data responsibility should:

- Deploy a unified data platform that standardizes how individual departments collect and store data (e.g., by implementing common data models, standardized APIs, or consistent metadata tagging).
- Create clear data quality metrics (like completeness, accuracy, timeliness, etc.) and, possibly automated, monitoring systems to catch issues before they impact AI systems.
- Co-establish a data governance initiative with representatives from IT, business units, and compliance to ensure all stakeholders' needs are addressed.

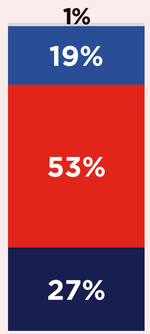
CIOs in organizations with separate data functions should:

- Define specific integration points between IT and data teams - for example, when launching a new system, clearly outline who handles data model design, who manages infrastructure, and who owns data quality.
- Create shared success metrics between IT and data teams (e.g., system uptime affecting data accuracy, API performance impacting data accessibility, joint SLAs for data-related incidents).
- Support data teams by providing solid technical infrastructure like processing capabilities, scalable storage, and security procedures while letting data teams maintain control over data governance and quality.
- Establish regular coordination meetings between IT, data, and business teams to align technology decisions with data strategy (e.g., quarterly reviews of technology roadmap impacts on data initiatives).

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

Partners to Supercharge AI Initiatives: From Infrastructure Design to AI Model Development

Current Usage of AI Professional Services



- Not using & no plans to do so
- Exploring the use of AI professional services
- Planning to use AI professional services
- Actively using AI professional services

Professional services are pivotal for organizations aiming to scale AI initiatives. From infrastructure design to AI model development, these services offer the expertise needed to overcome adoption challenges and ensure long-term success.

Considerations for CIOs

CIOs should choose providers based on their ability to deliver measurable outcomes and adapt to evolving needs.

For experienced organizations, prioritize scaling by strengthening partnerships, improving data management, and ensuring security and compliance to enhance AI performance and ROI.

For those new to AI, focus should be on simplifying adoption with as-a-service models, scalable infrastructure, and quick, impactful use cases.

What Do Organizations Seek in a Partner?

AI Adopters

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

Adopters focus on driving more advanced capabilities and operational value from their AI investments.

While they also value expertise, their emphasis is on scaling existing solutions and improving efficiencies. Adopters prioritize providers with deep partnerships in the AI ecosystem, such as alliances with ISVs or cloud platforms, which can enhance the functionality of their AI systems. As data becomes central to their operations, they demand advanced support for data management, governance, and compliance, alongside robust security measures to safeguard sensitive information. They also seek specialized support to optimize and refine their AI models for higher performance.

Non-Adopters of AI

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

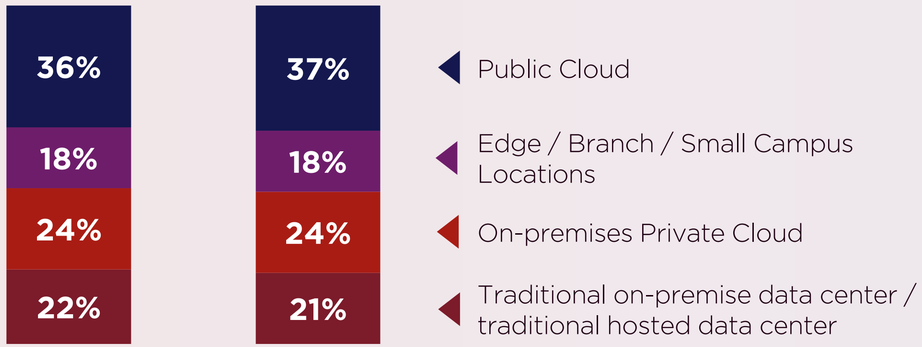
Non-adopters primarily look to providers as enablers to simplify their entry into AI.

They require robust infrastructure and hardware support to handle AI workloads, as well as assistance in building and deploying their first AI models. They also prioritize flexible as-a-service pricing models (SaaS, IaaS, PaaS) to reduce upfront costs and complexity. Additionally, these organizations also seek expertise to explain AI, understand its potential, and scale initial solutions effectively.

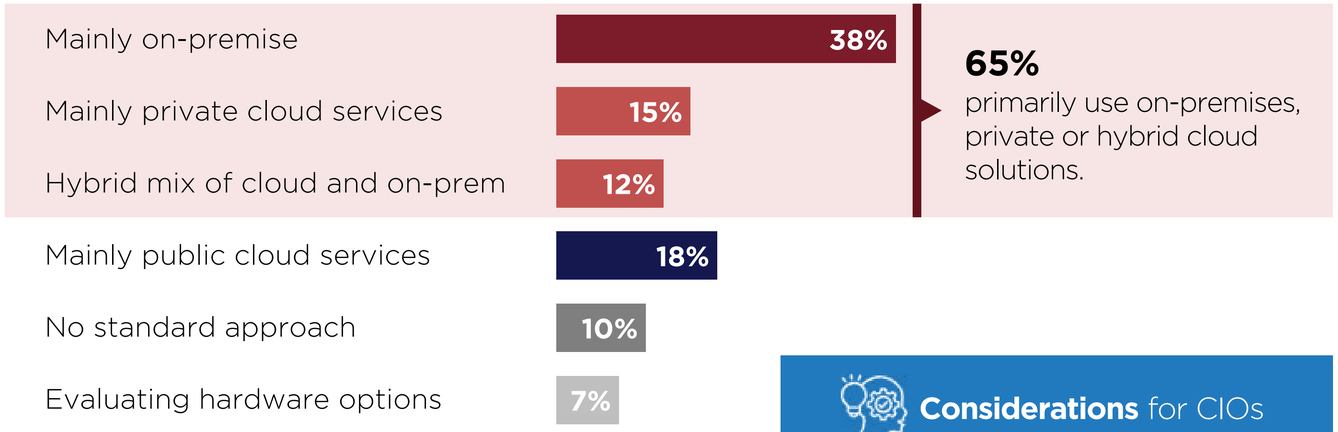
Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

For AI, Hybrid Infrastructure is Key: Balancing Control, Performance, and Flexibility

Overall Infrastructure Deployment



Primary Infrastructure Approach to AI Workloads



- While organizations overall plan to move slightly more towards cloud environments, their approach to AI workloads is notably different. A significant majority have implemented or are planning to implement AI workloads primarily on-premises or in a hybrid environment.
- This preference is likely driven by several factors. Firstly, on-premises and hybrid environments offer greater control over data security and privacy, which is crucial for handling sensitive information and ensuring regulatory compliance. Secondly, these environments provide lower latency and higher performance, essential for real-time AI applications. Additionally, on-premises solutions can be more cost-effective for extensive AI workloads, leveraging existing infrastructure investments.
- Hybrid environments are not just a technical preference—they are a strategic choice. On-premises solutions offer unparalleled control for organizations handling sensitive data or operating in heavily regulated industries, such as healthcare or finance. Meanwhile, public cloud services provide the flexibility to scale AI models quickly and cost-effectively. By combining the two, enterprises can tailor their approach to meet specific workload requirements. For instance, an AI-driven logistics system might run predictive models in the cloud while processing real-time data locally to ensure latency is minimized. This hybrid strategy enables businesses to optimize costs while meeting performance and compliance needs.

Considerations for CIOs

Hybrid AI architectures are crucial for balancing innovation and regulatory compliance. By strategically distributing workloads between on-premises, edge, and cloud environments, organizations can optimize costs, enhance security, and maintain data sovereignty while meeting strict regional regulations.

This approach allows for a flexible, modular infrastructure that protects sensitive data and supports competitive AI-driven strategies.

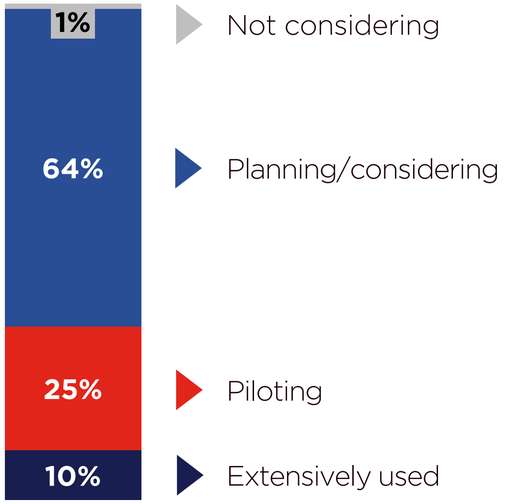
Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

The Next Gen of AI Devices is Here: AI-Powered PCs Becoming a Key Enabler for the Future Workforce

Survey Insights

43% of organizations highlighted that they believe that **AI-powered devices** boost employee **productivity** and **experience**.

AI-Powered PCs Adoption



Considerations for CIOs

For CIOs, this trend highlights the importance of integrating AI-powered PCs into their long-term IT strategy.

Even if full adoption is not immediate due to refresh cycles, planning and ensuring that new devices are AI-ready can help stay ahead of the curve.

CIOs should prioritize selecting devices with robust AI capabilities that align with their workforce's needs, ensuring seamless integration with broader AI initiatives.

As AI-powered PCs become more mainstream, CIOs will need to assess how they can leverage these devices to further drive productivity, enhance employee experience, and support successful AI implementation.

- AI-powered PCs are emerging as key enablers of intelligent digital workplaces, with 43% of organizations in EMEA recognizing their potential to enhance employee productivity and experience. AI-powered PCs are set to become crucial tools, providing AI capabilities at the edge for the workforce. Current AI adopters have identified the availability of AI-powered PCs as a key factor for successful AI implementation.
- While adoption is still in the early stages, with most companies either piloting or considering AI-powered PCs, this trend is expected to accelerate as organizations align their device refresh cycles with AI integration. The significant interest, with only 1% of organizations not considering AI-powered PCs, indicates that businesses are increasingly prioritizing technology that supports AI-driven workforce productivity.

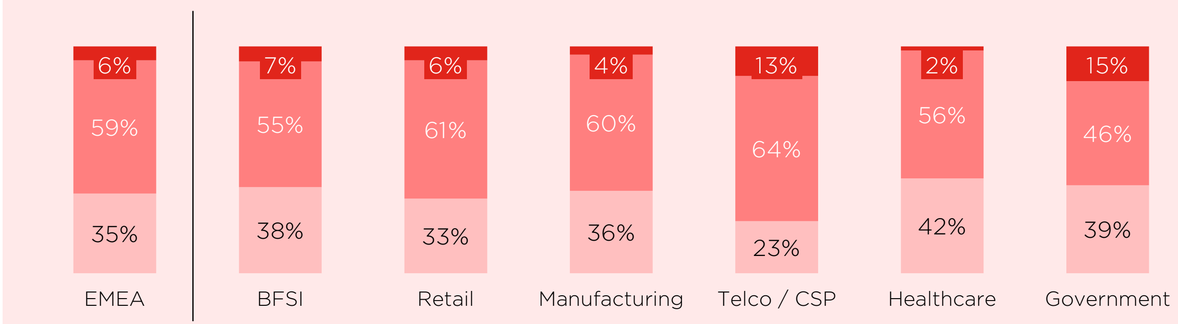
Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

Insights by Industries

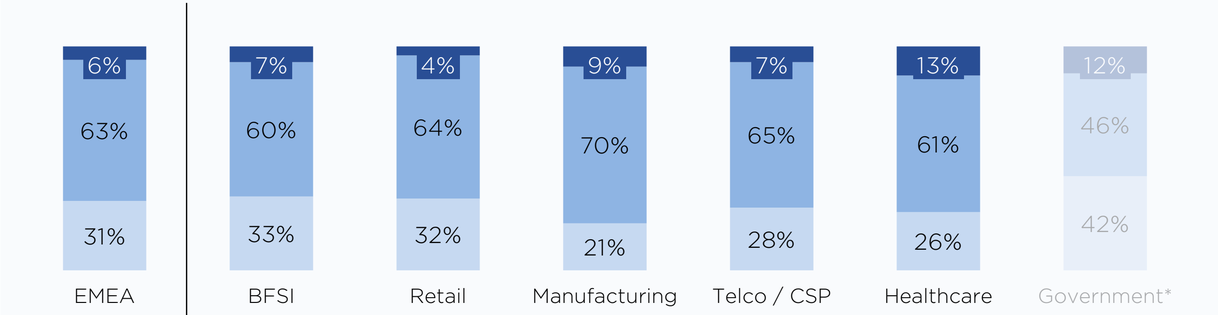
Overview by Industries

AI's impact and strategic role are driven by business priorities and operational challenges specific to each industry. While some industries are moving quickly and have exhibited significant AI adoption, industries such as manufacturing and healthcare are much further behind. CIOs should focus on tailoring AI initiatives to align with their industry's key priorities—be it regulatory compliance in healthcare, supply chain optimization in manufacturing, or innovation in retail.

AI Adoption

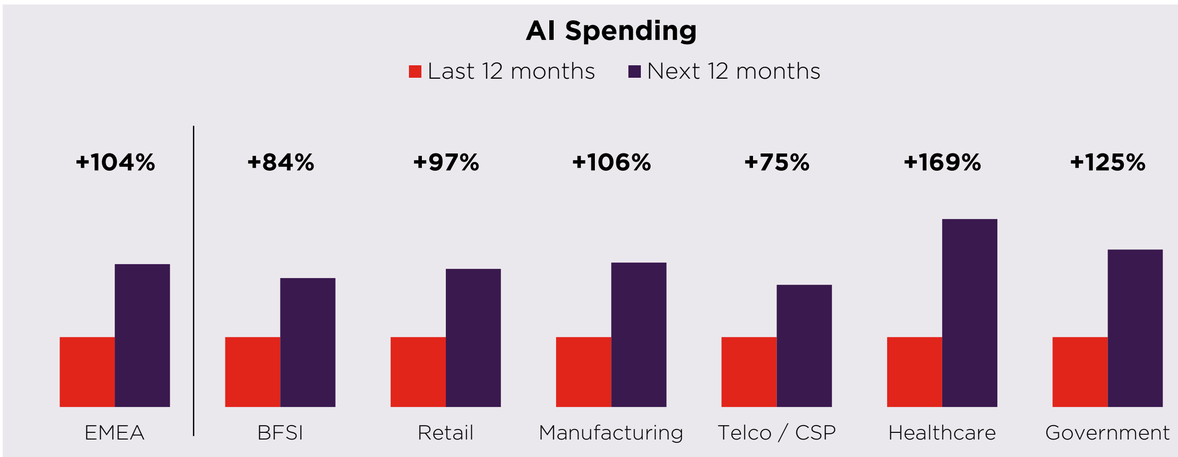


Has AI Met Expectations of Adopters?

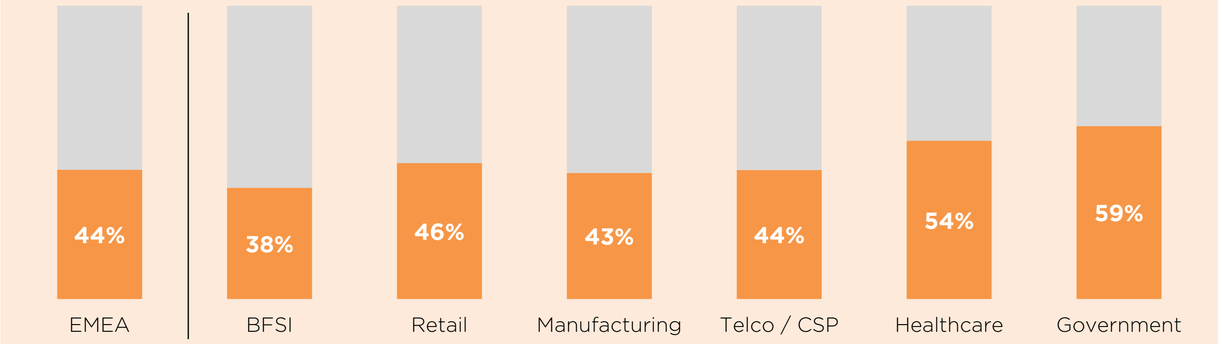


*Small sample

AI Spending



GenAI Share of AI Spending in Next 12 Months



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

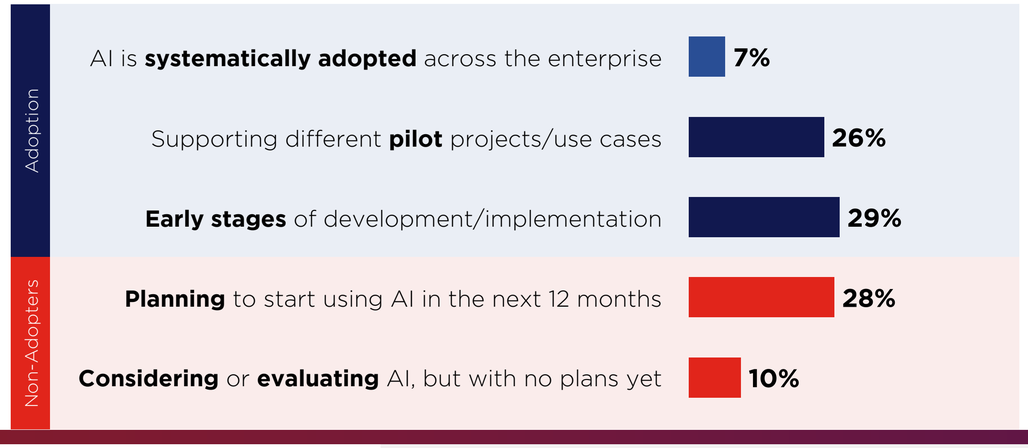
BFSI Overview

Organizations in the BFSI sector are leveraging AI to improve IT operations, software development, R&D, and cybersecurity. The sector's most significant business priorities—driving digital business innovation, accelerating time to market, and enhancing decision-making—align with the industry's emphases on operational efficiency and regulatory compliance. Organizations in BFSI face challenges in scaling AI across departments and navigating complex regulatory environments.

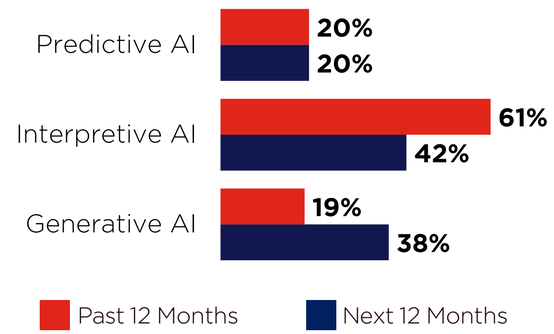
Business Priorities for 2025

1. Driving digital business innovation
2. Accelerating time to market
3. Improving sustainability
4. Optimizing supply chain/inventory
5. Enhancing decision making

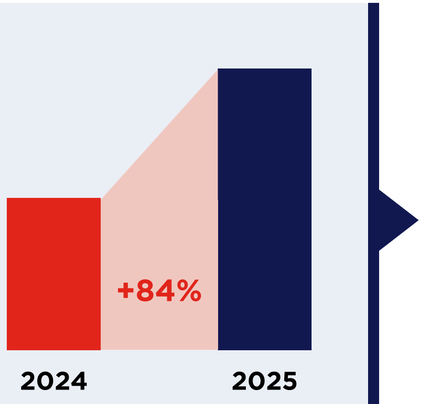
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. IT Ops
2. Software Development
3. Engineering/R&D
4. Cybersecurity
5. Customer service

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Challenges scaling AI across the enterprise (including lack of departmental support)
2. Unavailability or cost of AI expertise
3. GRC requirements/security issues
4. Lack of budget or management buy-in
5. Data quality issues

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

1. Availability of internal AI expertise
2. Access to partners with strong AI capabilities
3. Ensuring data sovereignty & compliance
4. Access to adequate hybrid compute & storage resources
5. Ease of integrating AI with existing systems & processes

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, BFSI n=137 | BFSI = Banking, Financial Services, and Insurance

BFSI Overview (continued)

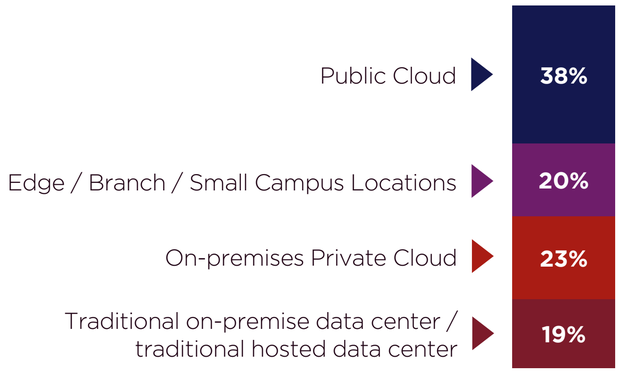
The BFSI sector demonstrates a strategic approach to AI adoption and infrastructure investment. There is a balanced infrastructure approach, with organizations considering traditional data centers, private clouds, and public cloud solutions for AI workloads. Financial organizations prioritize AI knowledge, expertise, and infrastructure support when seeking partners.

With 15% extensively using next-gen AI-powered PCs, BFSI organizations are above the regional average, emphasizing how these devices might enhance employee productivity.

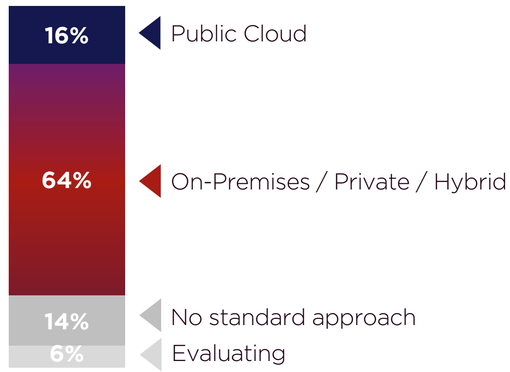
Survey Insights

38% of organizations highlighted that they will be developing **data management capabilities** in the next 12 months.

Overall **Infrastructure** Deployment – Next 12 Months



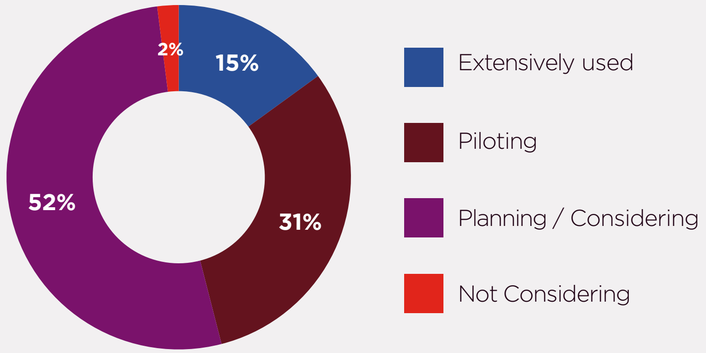
Primary **Infrastructure** Approach to **AI Workloads**



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

1. AI knowledge & expertise (including scaling AI solutions)
2. Infrastructure & hardware support for AI workloads
3. Depth of partnerships with AI solution providers (ISVs, alliance partners)
4. Provision of as-a-service (i.e., SaaS / IaaS / PaaS) pricing & offerings

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, BFSI n=137 | BFSI = Banking, Financial Services, and Insurance

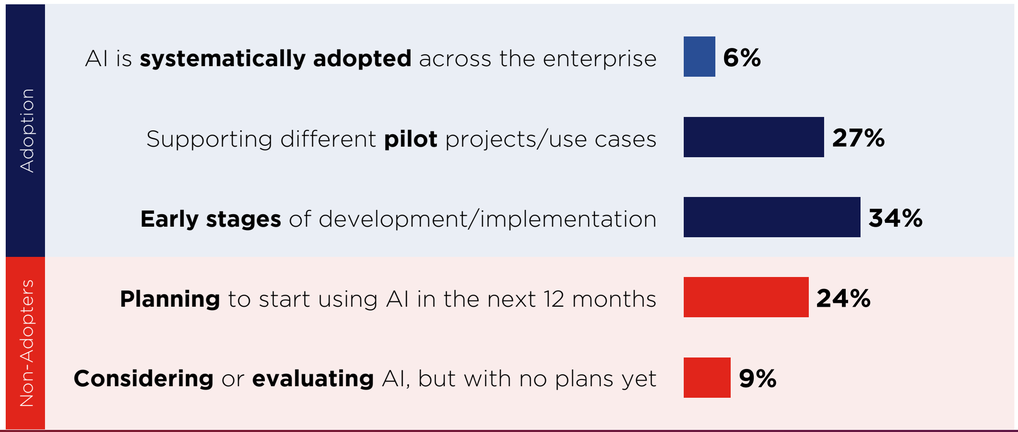
Retail Overview

Retailers are leveraging AI to drive employee productivity, optimize inventory management, and enhance decision-making processes. The adoption of AI in this sector is visible, with interpretive AI dominating use cases. However, with many retailers seeking to apply AI to customer-facing functions, the sector is also grappling with challenges such as scaling AI effectively and managing infrastructure costs. A historical lack of software technology investment prioritization continues to shape the retail landscape, driving issues such as unrealistic AI expectations and challenges accessing expertise.

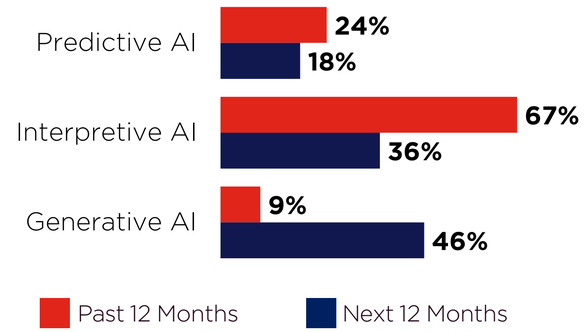
Business Priorities for 2025

1. Improving employee productivity
2. Optimizing supply chain/inventory
3. Driving digital business innovation
4. Improving sustainability
5. Enhancing decision making

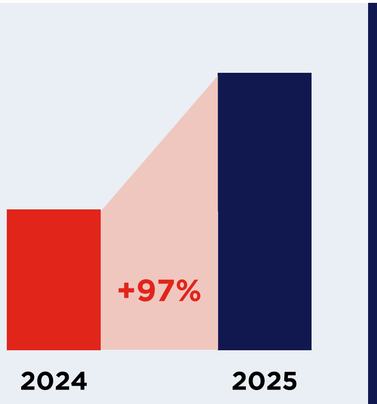
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. IT Ops
2. Facilities
3. Engineering/R&D
4. Cybersecurity
5. Marketing

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Application latency/performance issues
2. Challenges scaling AI across the enterprise (including lack of departmental support)
3. IT infrastructure/network costs
4. Unrealistic expectations from senior management
5. Unavailability or cost of AI expertise

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

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Retail n=82

Retail Overview (continued)

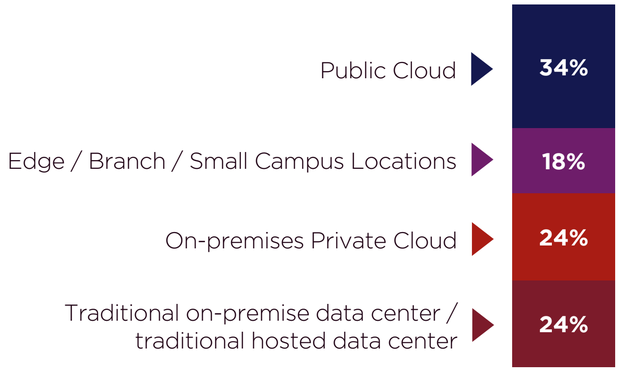
Retail organizations are focused on delivering measurable business outcomes and managing data effectively in their AI strategies. The availability of quality data emerges as a critical success factor for AI implementation in this sector. While they prefer on-premise or hybrid platforms for AI workloads, a significant percentage are still willing to leverage public cloud.

Only 7% of retailers are extensively using next-gen AI-powered PCs, while 75% are planning and considering AI-PC adoption, indicating significant room for growth in the coming years.

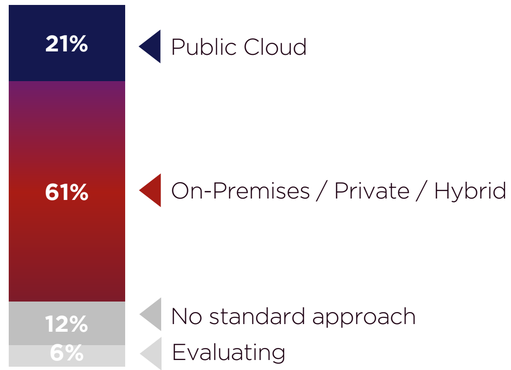
Survey Insights

The **availability of quality data** is the **#2 most important success factor** for AI implementation.

Overall **Infrastructure** Deployment – Next 12 Months



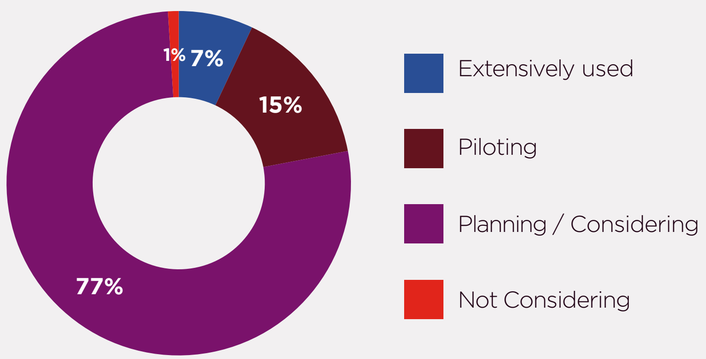
Primary **Infrastructure** Approach to **AI Workloads**



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

1. Ability to help our organization deliver measurable business outcomes
2. Support for data management
3. Infrastructure & hardware support for AI workloads
4. AI knowledge & expertise (including scaling AI solutions)

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Retail n=82

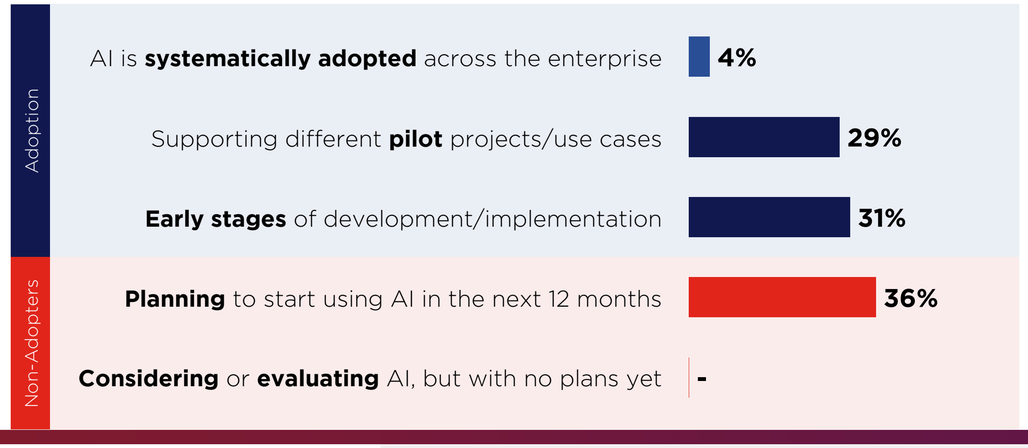
Manufacturing Overview

Manufacturing companies are prioritizing decision-making, compliance, and employee productivity as they adopt AI to enhance operational efficiency and drive profitability. Success with AI will depend on a careful approach to integration, with system compatibility and adequate compute resources being key success factors. A historical lack of software technology investment prioritization in manufacturing is behind many firms' integration challenges, especially with legacy systems, and struggles with scaling AI initiatives across global operations.

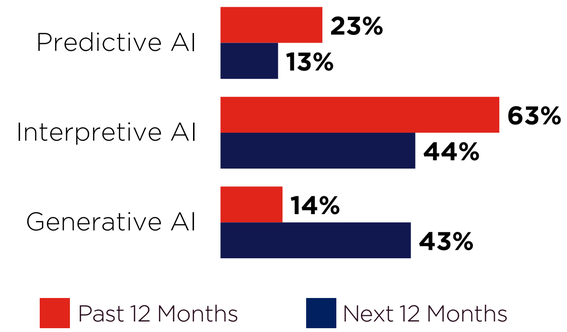
Business Priorities for 2025

1. Enhancing decision making
2. Improving customer experience & satisfaction
3. Increasing revenues & profit growth
4. Improving regulatory compliance
5. Improving employee productivity

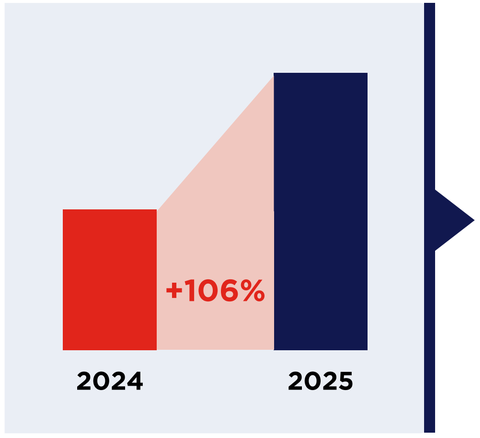
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. Software Development
2. Engineering/R&D
3. Cybersecurity
4. Sales
5. Supply Chain

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. IT infrastructure/network costs
2. Challenges scaling AI across the enterprise (including lack of departmental support)
3. Unavailability or cost of AI expertise
4. Unrealistic expectations from senior management
5. Problems integrating AI with existing systems & processes

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

1. Ease of integrating AI with existing systems & processes
2. Access to adequate hybrid compute & storage resources
3. Adequate budget & management commitment
4. Ensuring data sovereignty & compliance
5. Access to partners with strong AI capabilities

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Manufacturing n=55

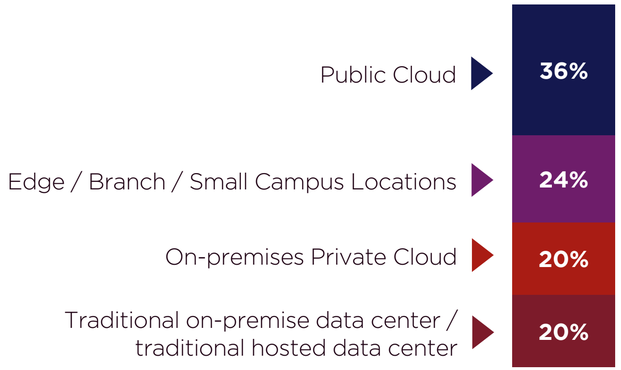
Manufacturing Overview (continued)

Manufacturers' data landscapes are often challenging and complex, so unsurprisingly, 35% of organizations plan to develop data management capabilities in the next 12 months. Manufacturing firms prioritize infrastructure support and partnerships for AI workloads, with a strong emphasis on AI modeling and development. A modest 4% are extensively using next-gen AI-powered PCs, suggesting an emerging adoption curve.

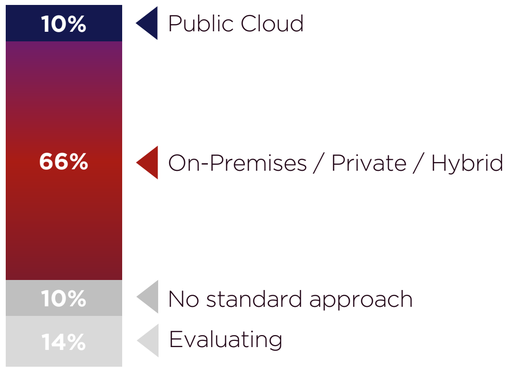
Survey Insights

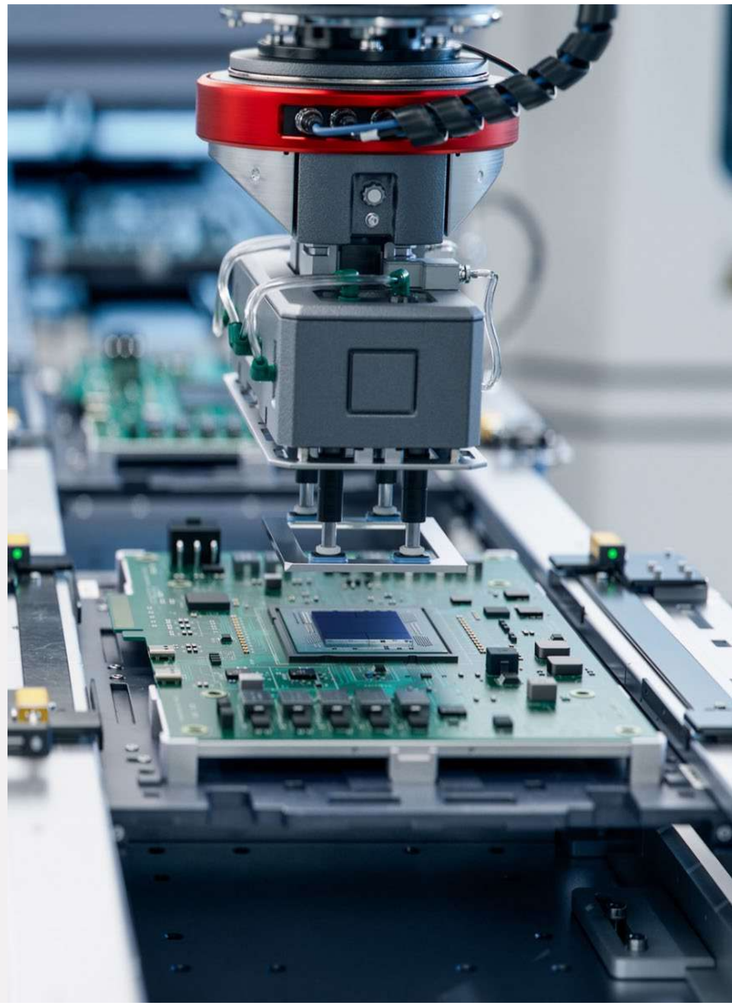
35% of organizations highlighted that they will be developing **data management capabilities** in the next 12 months.

Overall **Infrastructure** Deployment – Next 12 Months



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

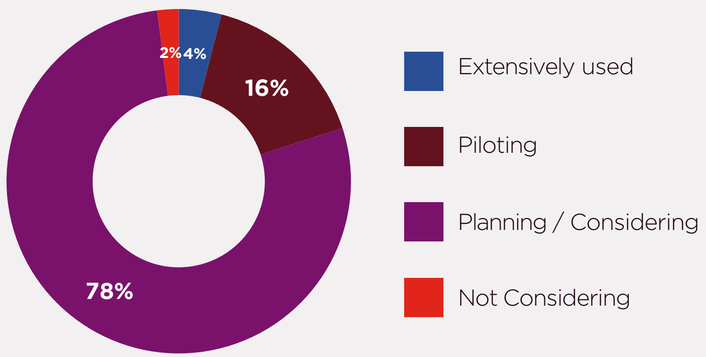




What Do Organizations **Seek in a Partner**?

1. Infrastructure & hardware support for AI workloads
2. Depth of partnerships with AI solution providers (ISVs, alliance partners)
3. Support for AI modeling & development
4. Ability to help our organization deliver measurable business outcomes

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Manufacturing n=55

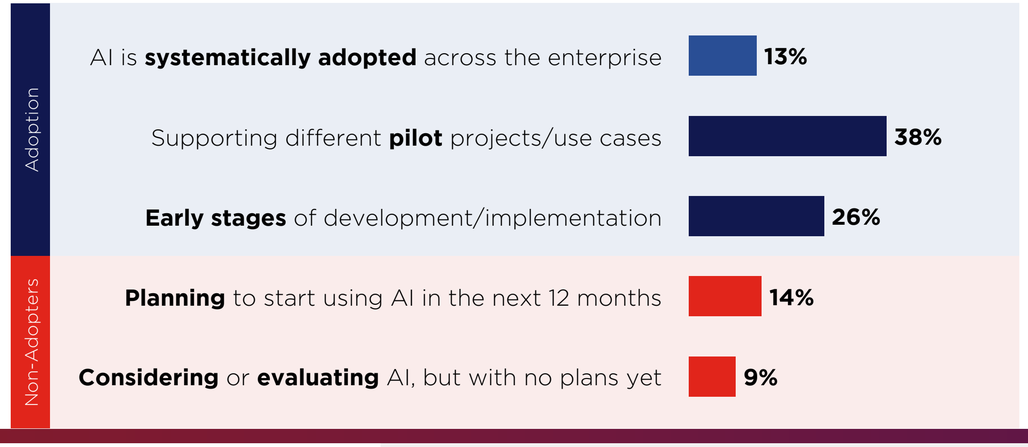
Telecommunication / Cloud Service Provider Overview

Telecommunication and cloud service providers are using AI to optimize supply chains, improve regulatory compliance, and enhance customer experiences. This sector's strong AI maturity (compared to other industries in this study) is reflected in organizations' focus on seamless system integration, employee training, and ensuring data sovereignty as key factors for AI success. Nevertheless, challenges such as high infrastructure costs, the complexity of deploying AI at endpoint and edge locations, and data quality concerns persist.

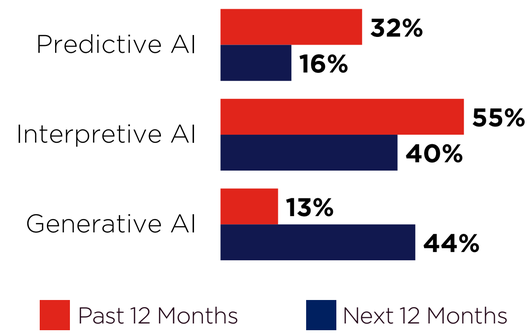
Business Priorities for 2025

1. Optimizing supply chain/inventory
2. Improving regulatory compliance
3. Driving digital business innovation
4. Reducing business risk & cyber threats
5. Improving customer experience & satisfaction

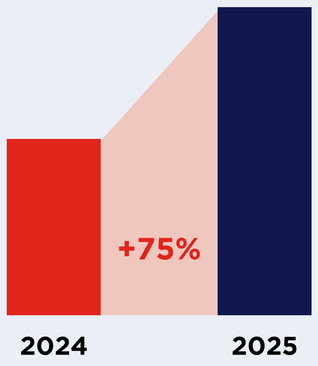
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. IT Ops
2. Engineering/R&D
3. Cybersecurity
4. Finance
5. Customer service

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. IT infrastructure/network costs
2. Data quality issues
3. Lack of budget or management buy-in
4. Challenges deploying AI solutions at endpoints
5. Problems integrating AI with existing systems & processes

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

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Telco / CSP n=92

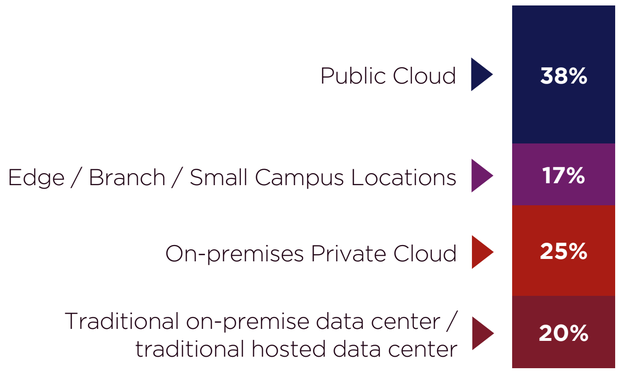
Telecommunication / Cloud Service Provider Overview (continued)

Data quality issues are identified as a key inhibitor for AI projects falling short of expectations, which might result from the numerous legacy systems that customers frequently struggle with. When it comes to partnerships, telecom and cloud service providers prioritize AI expertise, governance, risk, and compliance (GRC) support. The use of AI-powered devices is ahead of the regional average, showing a higher need for endpoint devices enabling employees.

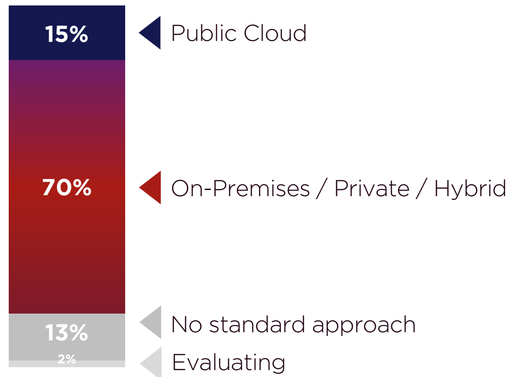
Survey Insights

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

Overall **Infrastructure** Deployment – Next 12 Months



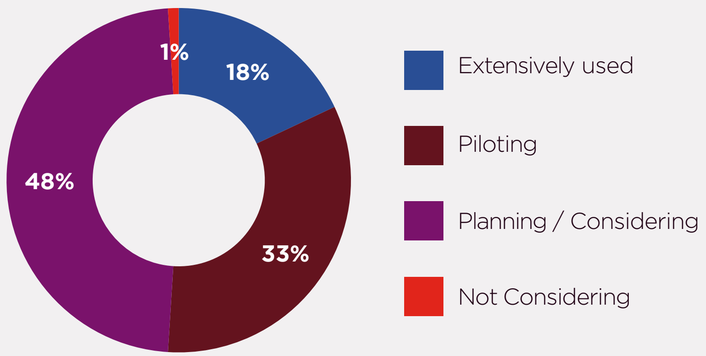
Primary **Infrastructure** Approach to **AI Workloads**



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

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

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Telco / CSP n=92

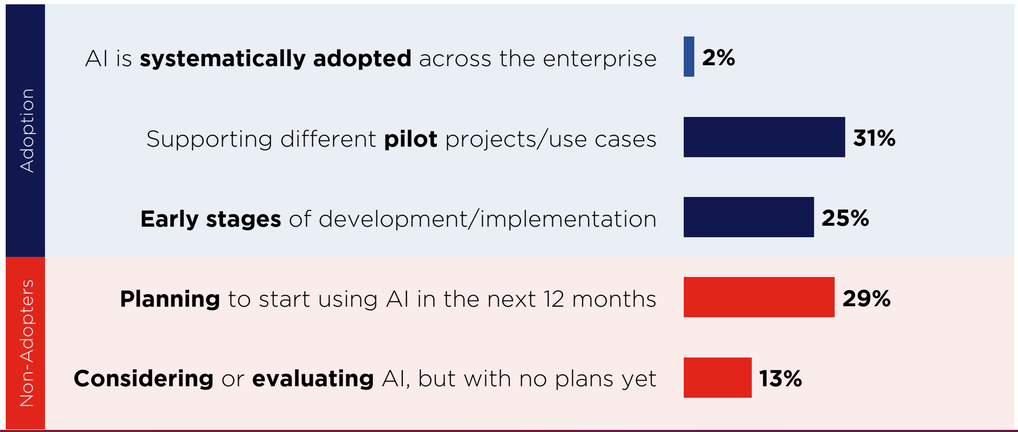
Healthcare Overview

Healthcare organizations leverage AI for regulatory compliance, cybersecurity, and innovation. CIOs in this industry see accessing partners with strong AI capabilities and leveraging AI-powered edge devices as critical. Challenges such as data quality, app performance, and infrastructure costs remain significant barriers. Healthcare institutions will also need to tackle issues related to managing expectations.

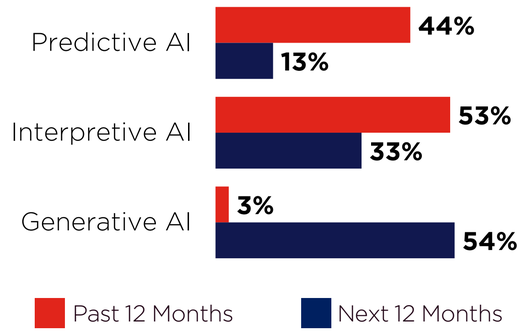
Business Priorities for 2025

1. Optimizing supply chain/inventory
2. Improving regulatory compliance
3. Driving digital business innovation
4. Reducing business risk & cyber threats
5. Improving customer experience & satisfaction

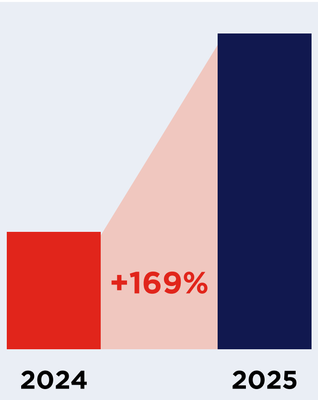
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. IT Ops
2. Engineering/R&D
3. Cybersecurity
4. Software Development
5. Finance

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Data quality issues
2. Application latency/performance issues
3. Unrealistic expectations from senior management
4. IT infrastructure/network costs
5. Unavailability or cost of AI expertise

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

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Healthcare n=55

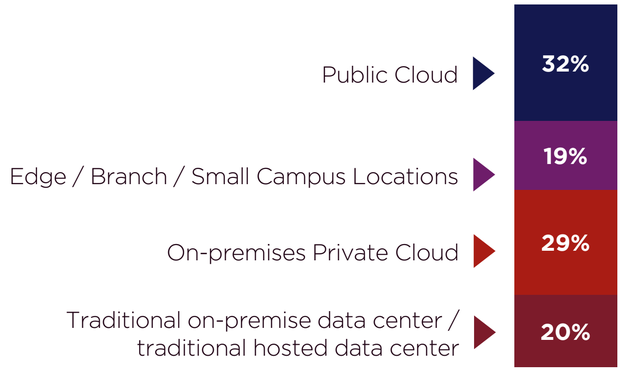
Healthcare Overview (continued)

Data quality issues are noted as the primary inhibitor for AI projects not meeting expectations, which comes as no surprise given the requirement for data quality in safety-critical use cases that dominate so much of healthcare activity. When seeking partners to run AI projects, healthcare organizations look for providers offering data security, privacy, and infrastructure support for AI workloads. With only 5% extensively using next-gen AI-powered PCs, the sector appears to be in the early stages of AI-powered device adoption.

Survey Insights

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

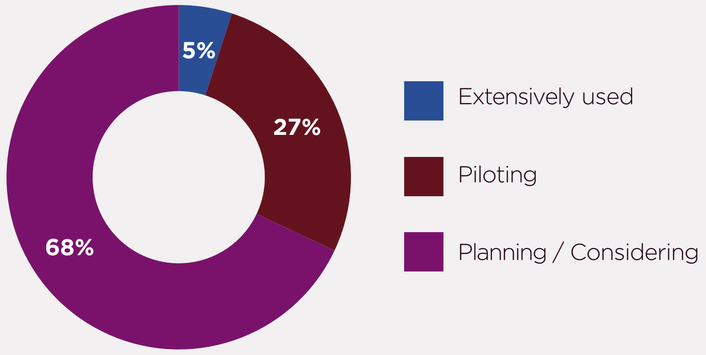
Overall **Infrastructure** Deployment – Next 12 Months



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

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

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Healthcare n=55

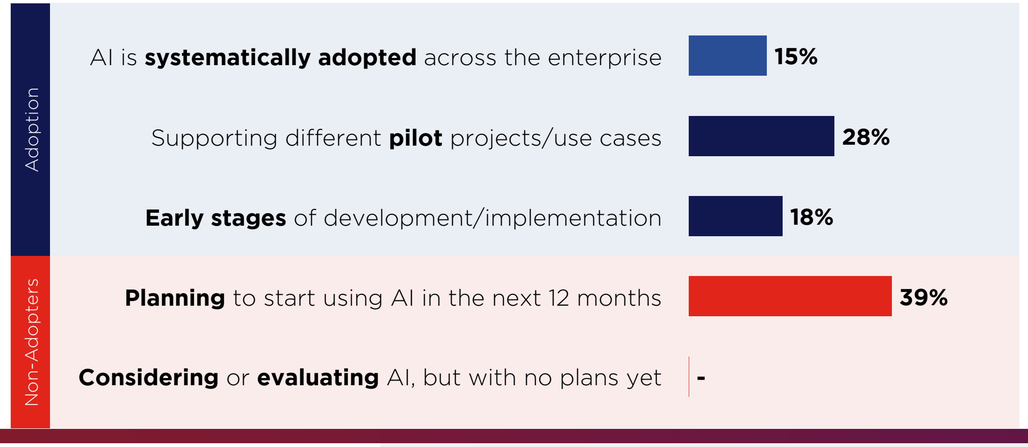
Government Overview

Governments are adopting AI to drive digital innovation, reduce costs, and improve regulatory compliance. However, overall, in government, a higher proportion of organizations than average are still at the very earliest stages of AI adoption, with many initiatives still in pilot stages and a relatively high number of non-adopters. Key success factors for government study respondents include the availability of AI-powered devices, ensuring data sovereignty, and securing management commitment. Scaling AI projects and addressing data quality issues remain persistent challenges.

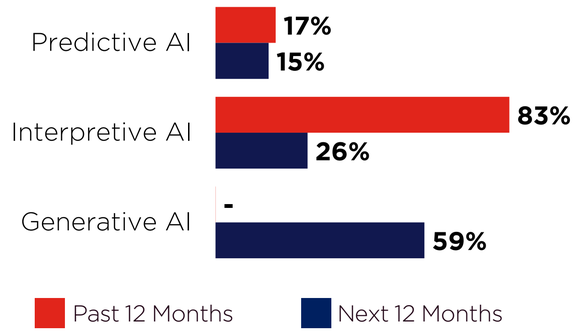
Business Priorities for 2025

1. Driving digital business innovation
2. Improving regulatory compliance
3. Optimizing supply chain/inventory
4. Decreasing costs
5. Improving employee productivity

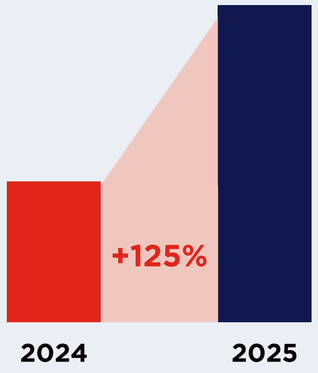
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. Marketing
2. Supply Chain
3. Sales
4. Procurement
5. IT Ops

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. IT infrastructure/network costs
4. Application latency/performance issues
5. Unrealistic expectations from senior management

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

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Government n=39

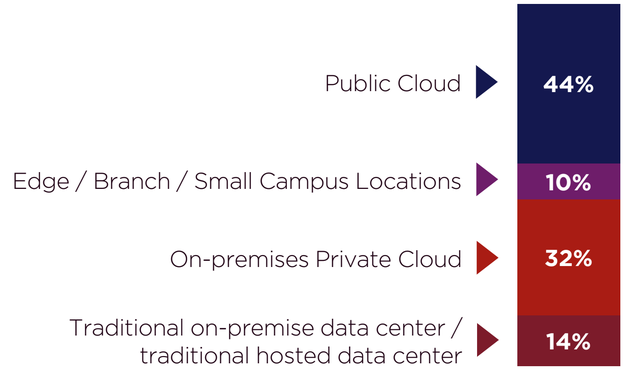
Government Overview (continued)

Government entities tend to look for partners that offer both tactical and strategic support: from data management to business outcomes to as-a-service pricing models. Governments collect copious amounts of data, and given how dispersed and varied this data is, data quality issues are highlighted as a significant challenge in AI project implementation. Among governmental institutions, 10% are extensively using next-gen AI-powered PCs, indicating a cautious but growing interest in AI technologies.

Survey Insights

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

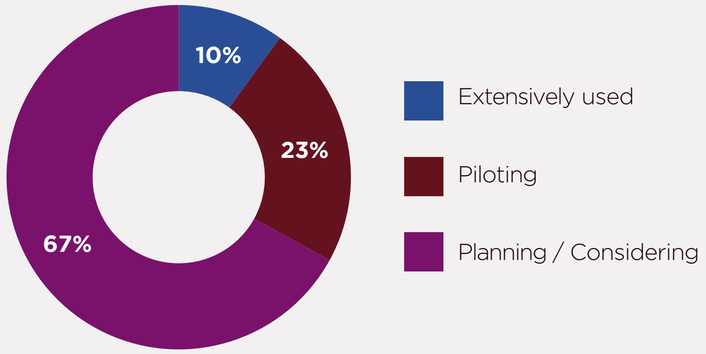
Overall **Infrastructure** Deployment – Next 12 Months



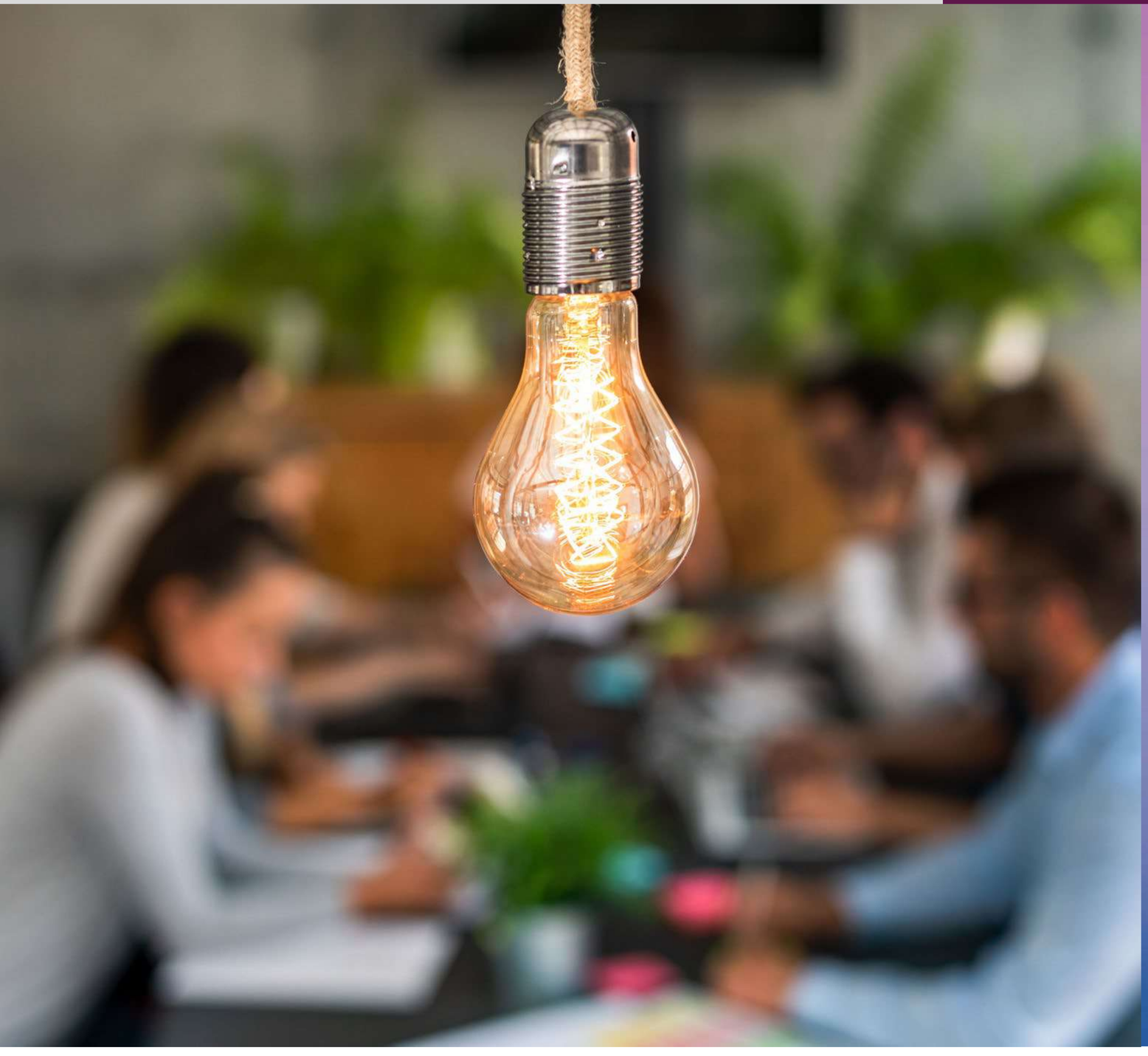
What Do Organizations **Seek in a Partner**?

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

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Government n=39

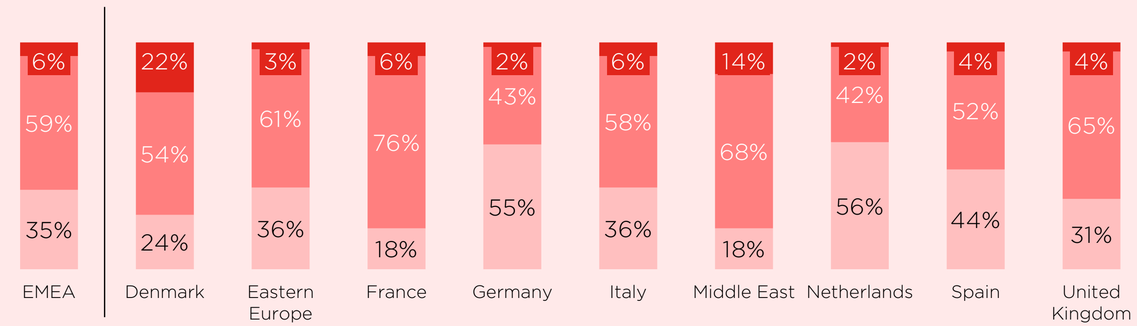


Insights by **Markets**

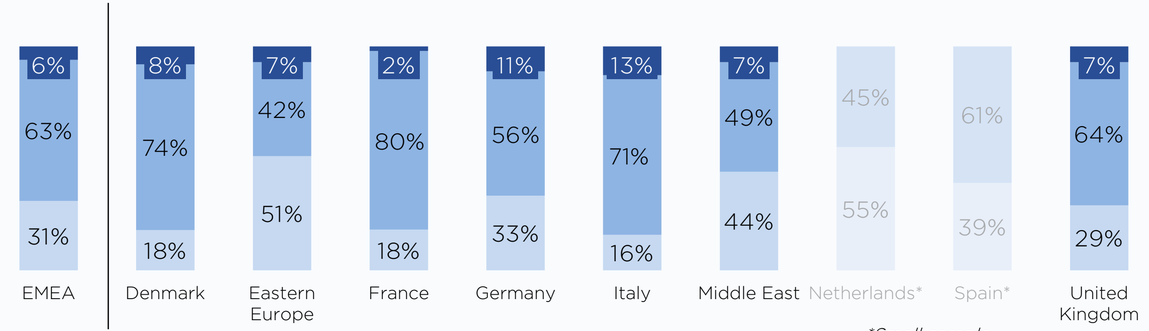
Overview by Markets

The EMEA markets present a diverse landscape of AI adoption, with significant variations across different countries and regions. The research found that while Denmark and Middle Eastern countries demonstrate the most significant AI adoption, other countries are moving much more slowly. Generative AI is consistently a key focus, representing 32-56% of future AI investments across different markets.

AI Adoption

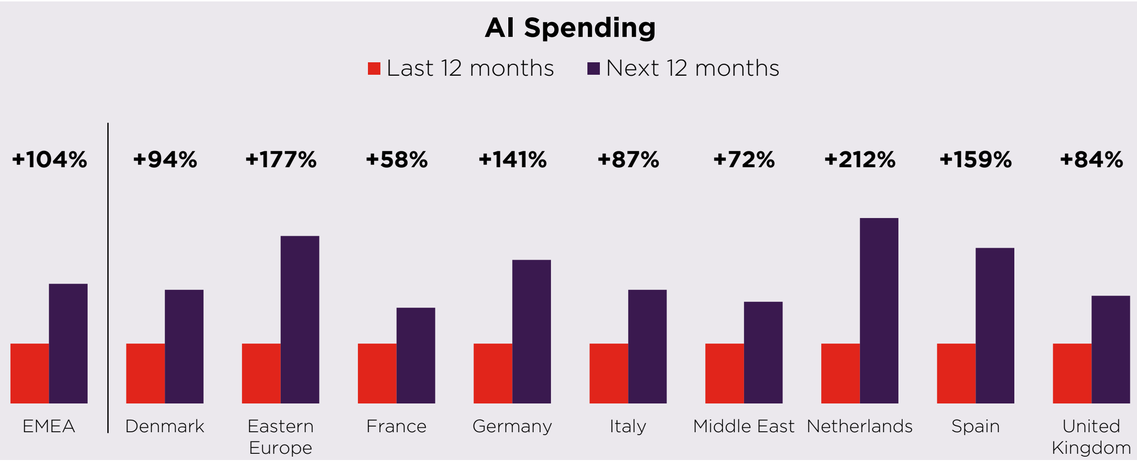


Has AI Met Expectations of Adopters?

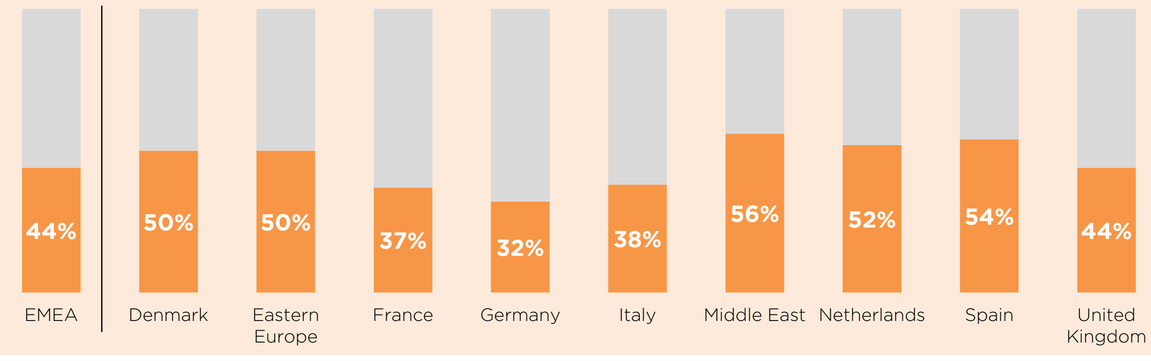


*Small sample

AI Spending



GenAI Share of AI Spending in Next 12 Months



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, n=620

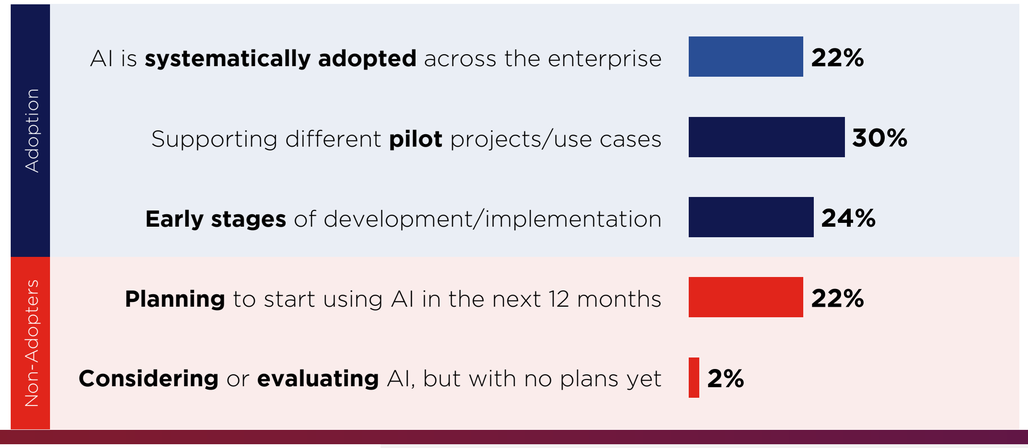
Denmark Overview

Organizations in Denmark are making notable progress in integrating AI, with a focus on decision-making and supply chain optimization. The heavy use of AI in IT operations and marketing demonstrates a strategic approach to improving operational insights. Generative AI is becoming a high priority, but adoption to date has been slower than in other markets. Organizations in Denmark stress the need for financing and management buy-in to ensure strategic adoption of AI. Challenges such as data quality and scaling AI across organizations highlight the importance of collaboration between government, enterprises, and solution providers to create compliant and impactful AI ecosystems.

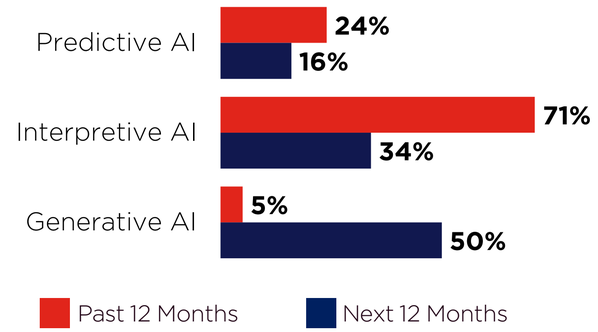
Business Priorities for 2025

1. Enhancing decision making
2. Optimizing supply chain/inventory
3. Improving regulatory compliance
4. Improving employee productivity
5. Applying emerging AI technologies (e.g., generative AI)

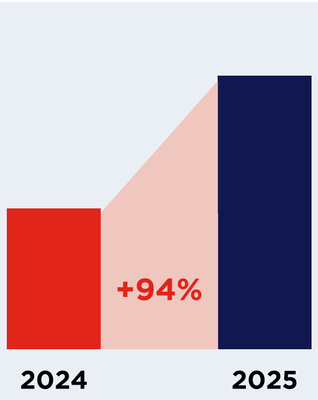
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. IT Ops
2. Marketing
3. Cybersecurity
4. Software Development
5. Supply Chain

Inhibitors That Resulted in AI Projects Not Meeting Expectations

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

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

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Denmark n=50

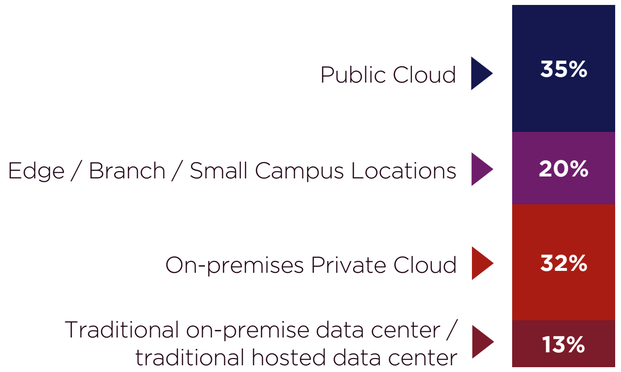
Denmark Overview (continued)

The country emphasizes quality data availability as a key success factor, aligning closely with overall EMEA trends. A relatively high percentage of organizations are willing to run AI workloads on the public cloud compared to other countries. With 20% of companies declaring they are extensively using AI-powered PCs, Denmark is far ahead of other countries in the region. Infrastructure and hardware support are top priorities for partner selection. Organizations also value the depth of partnerships with AI solution providers.

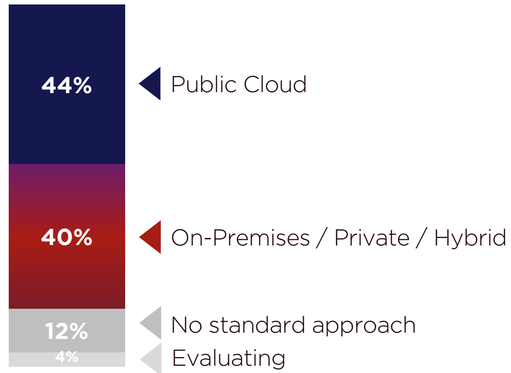
Survey Insights

The **availability of quality data** is the **#2 most important success factor** for AI implementation.

Overall **Infrastructure** Deployment – Next 12 Months



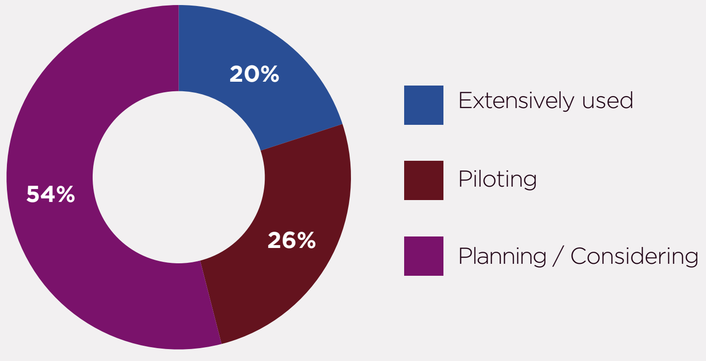
Primary **Infrastructure** Approach to **AI Workloads**



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

1. Infrastructure & hardware support for AI workloads
2. Depth of partnerships with AI solution providers (ISVs, alliance partners)
3. Support for data security & privacy
4. AI knowledge & expertise (including scaling AI solutions)

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Denmark n=50

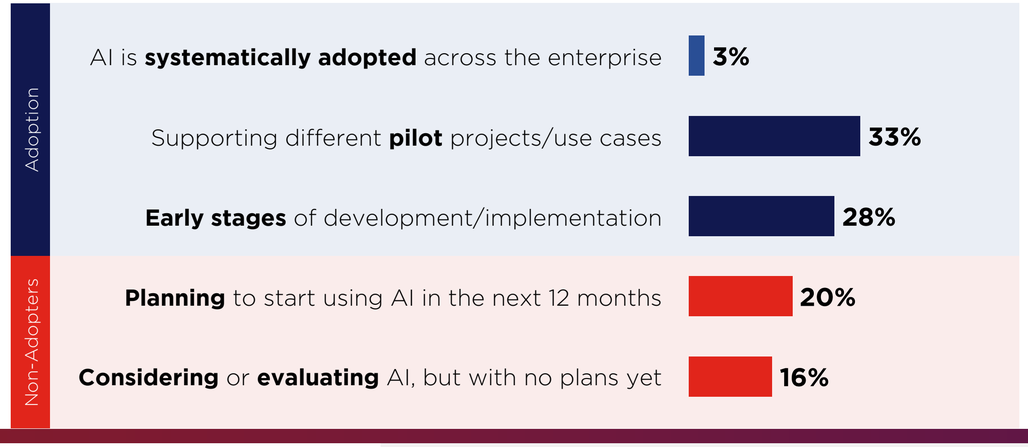
Eastern Europe Overview

Eastern Europe's priorities focus on improving supply chain efficiency, sustainability, and cost reduction. This region plans for the most balanced split of AI categories, supporting a wider range of business functions from IT operations to customer service to engineering. The region's approach to AI is shaped by its diverse economic landscape, with varying levels of adoption across countries and market segments. While some organizations lead in innovation, others face challenges such as data quality and expertise shortages. Seeing the potential, organizations in this region have indicated that they plan to increase AI spending significantly, especially when compared to the overall EMEA average.

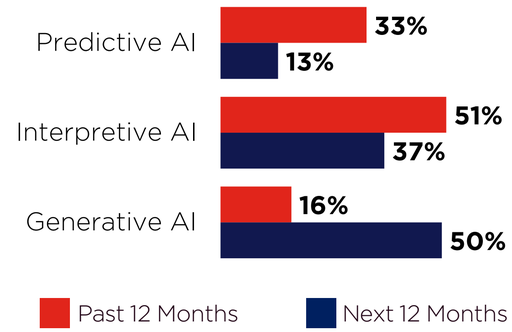
Business Priorities for 2025

1. Optimizing supply chain/inventory
2. Improving sustainability
3. Decreasing costs
4. Improving regulatory compliance
5. Applying emerging AI technologies (e.g., generative AI)

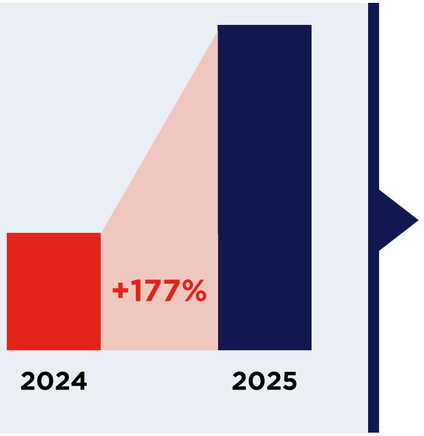
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. IT Ops
2. Customer service
3. Engineering/R&D
4. Procurement
5. Supply Chain

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Data quality issues
2. Challenges scaling AI across the enterprise (including lack of departmental support)
3. Unavailability or cost of AI expertise
4. Application latency/performance issues
5. Lack of budget or management buy-in

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

1. Ensuring data sovereignty & compliance
2. Access to partners with strong AI capabilities
3. Adequate budget & management commitment
4. Availability of internal AI expertise
5. Access to adequate hybrid compute & storage resources

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Eastern Europe n=70

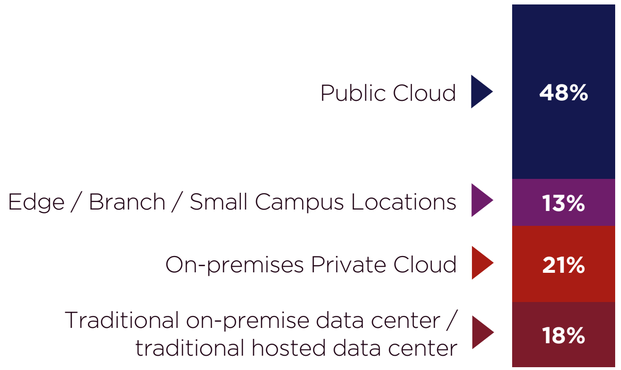
Eastern Europe Overview (continued)

Organizations in this region identify data quality issues as the primary inhibitor that challenges AI project success. When seeking partners, organizations look for hands-on support in data security and AI knowledge to close the capabilities gap. Public cloud adoption is accelerating, driven by the need for cost-effective solutions. This region is also surprisingly open to running AI workloads in the public cloud, but even then, more than half of organizations would prefer on-premise or hybrid infrastructure platforms to run AI. Interest in AI-powered PCs is lower than in other markets.

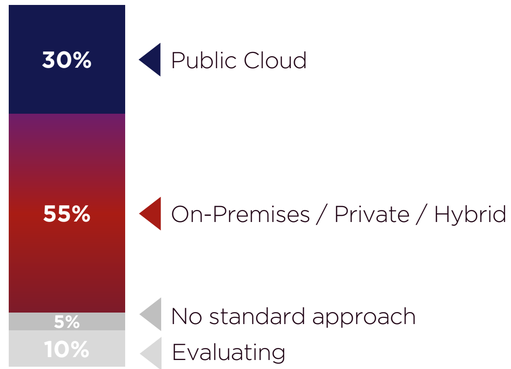
Survey Insights

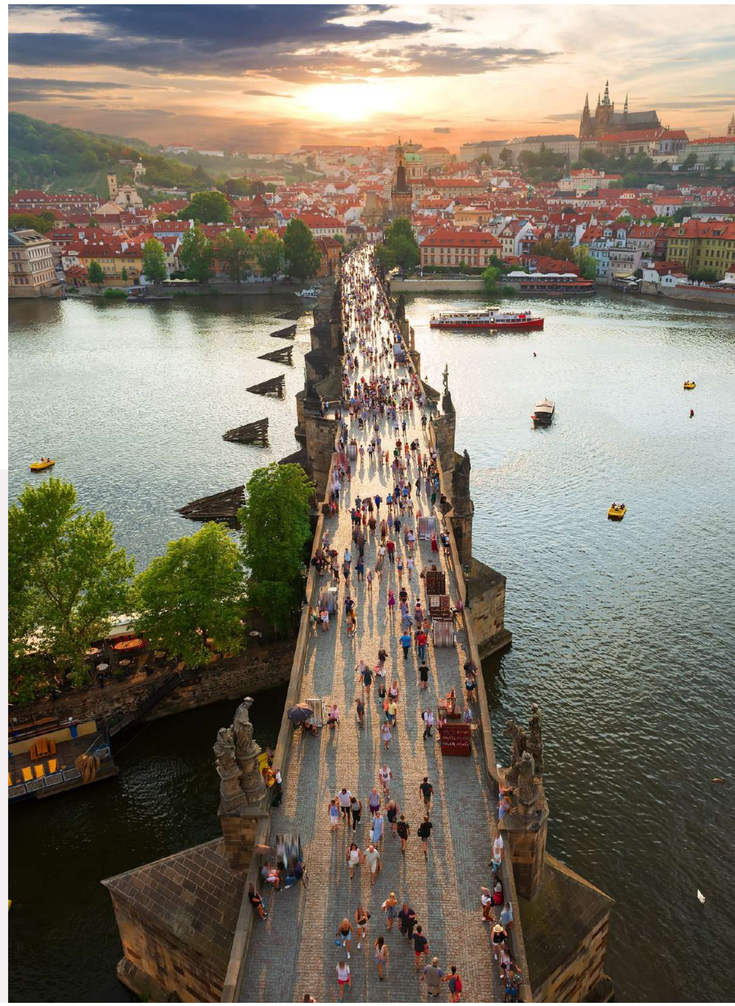
Data quality issues are the **#1 inhibitor** causing AI projects to fall short of expectations.

Overall **Infrastructure** Deployment – Next 12 Months



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

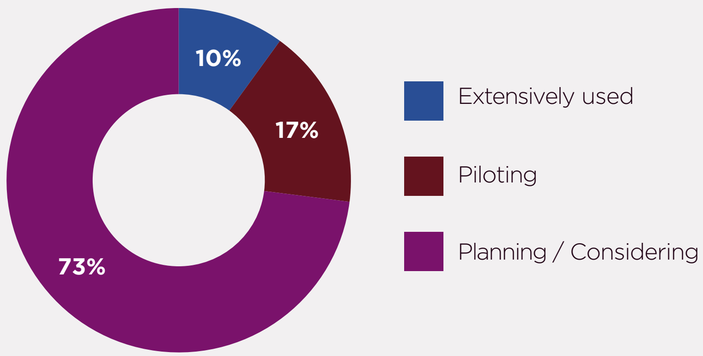




What Do Organizations **Seek in a Partner**?

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

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Eastern Europe n=70

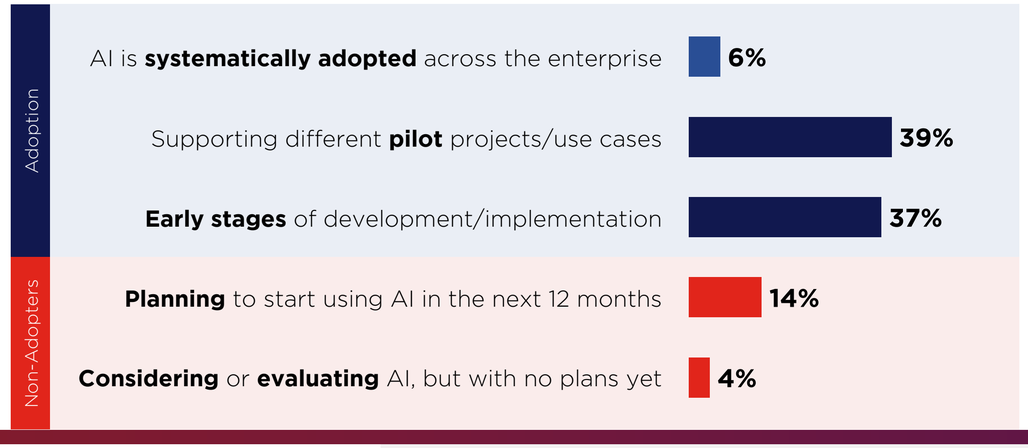
France Overview

In France, organizations have embraced AI as a tool for driving innovation, optimizing supply chains, and enhancing customer experiences. Predictive and interpretative AI are already cornerstones for many businesses, while generative AI is starting to find its place. France has the lowest share of non-adopters compared to other countries surveyed. Governance and budget constraints are prominent challenges, requiring CIOs to balance innovation with practicality. Upskilling the workforce to adapt to AI-driven workflows is also emerging as a critical area for long-term success.

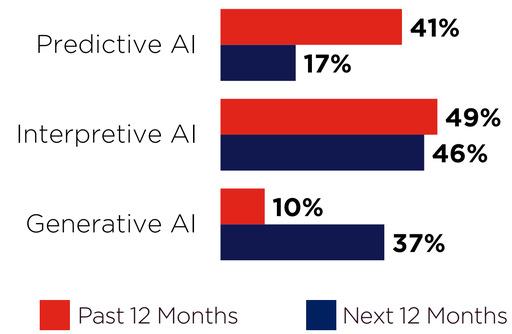
Business Priorities for 2025

1. Optimizing supply chain/inventory
2. Driving digital business innovation
3. Improving customer experience & satisfaction
4. Enhancing decision making
5. Increasing revenues & profit growth

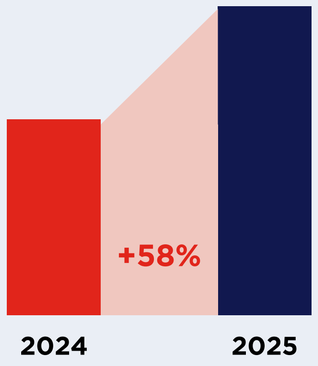
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. IT Ops
2. Facilities
3. Software Development
4. Supply Chain
5. Human resources

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. GRC requirements/security issues
2. Lack of budget or management buy-in
3. Challenges deploying AI solutions at endpoints
4. Application latency/performance issues
5. Unavailability or cost of AI expertise

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

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, France n=100

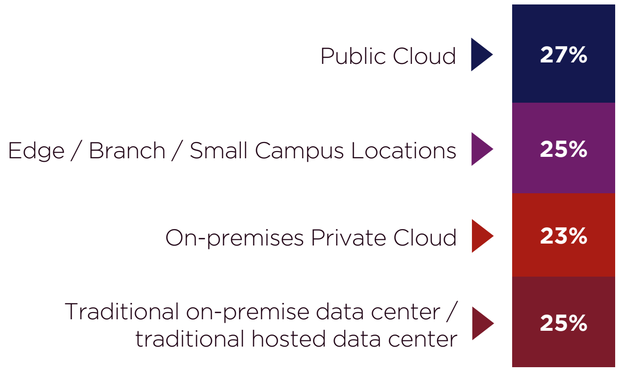
France Overview (continued)

France demonstrates a strong desire for data security and privacy, and a focus on developing data management capabilities. Partners are also valued for their AI expertise and solution provider networks. The shift toward the public cloud in France is much slower than in other parts of the region, with close to 70% of organizations declaring that AI workloads require on-premise, private, or hybrid infrastructure. AI-powered PC adoption in France is much lower than the European average, but many organizations are already in the piloting phase.

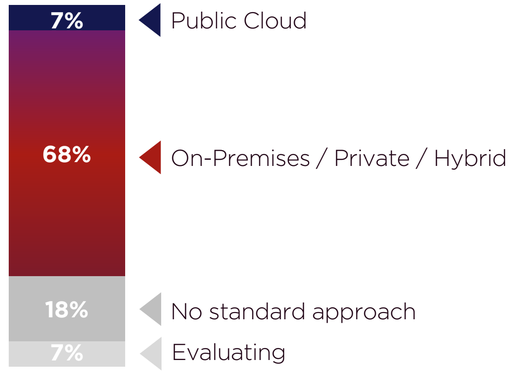
Survey Insights

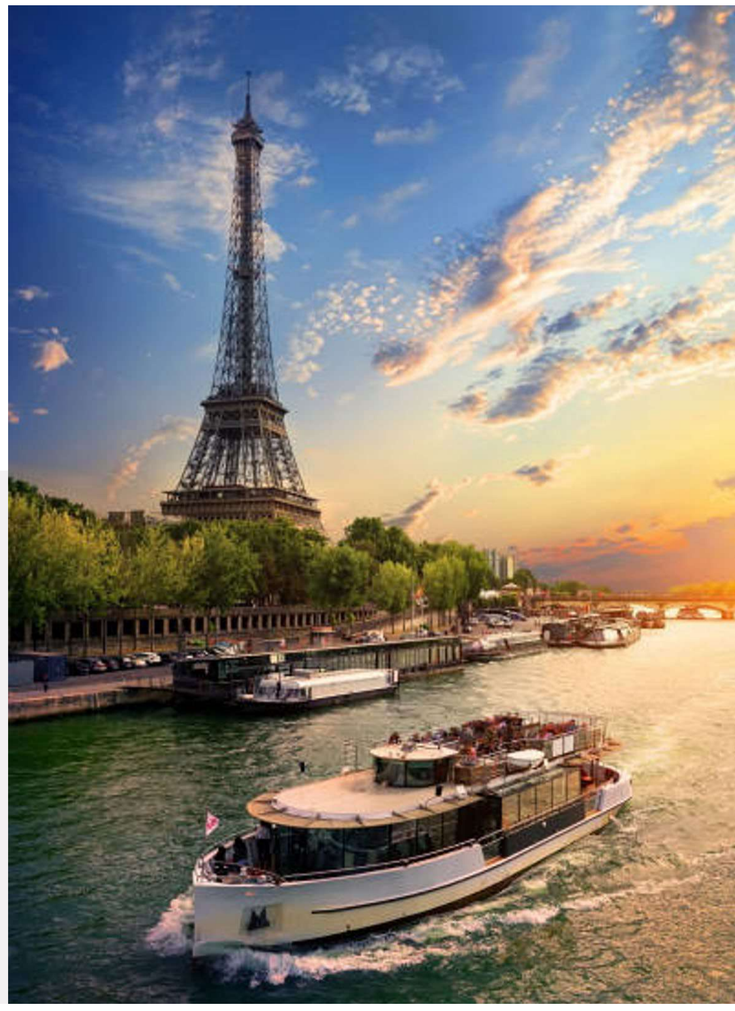
32% of organizations highlighted that they will be developing **data management capabilities** in the next 12 months.

Overall **Infrastructure** Deployment – Next 12 Months



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

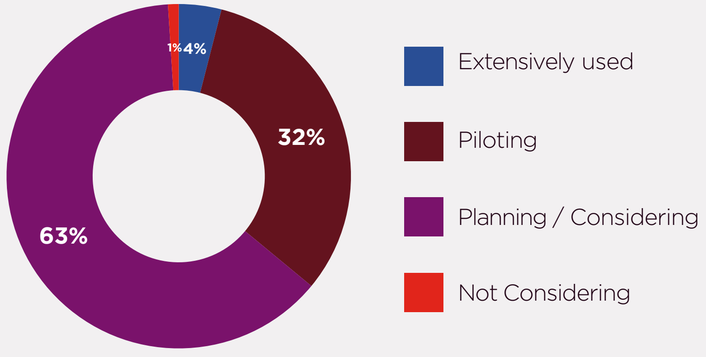




What Do Organizations **Seek in a Partner**?

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

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, France n=100

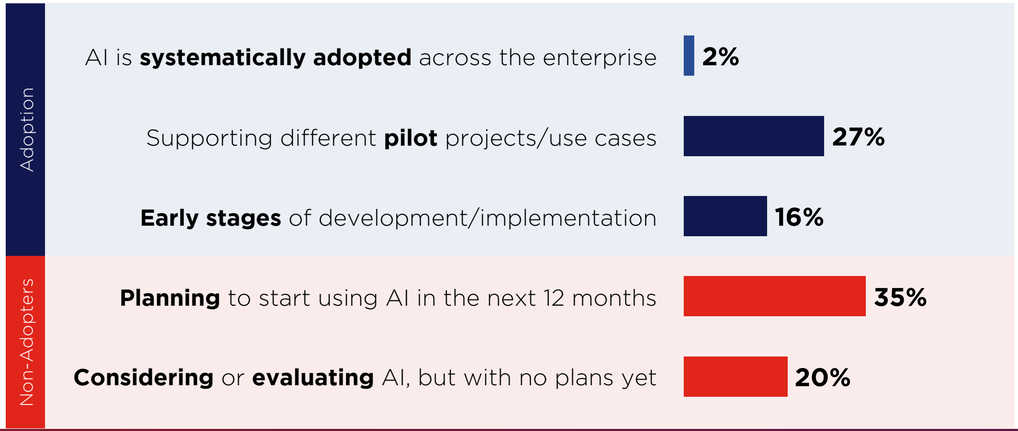
Germany Overview

Germany's industrial strength is reflected in its AI priorities, which include boosting employee productivity, optimizing supply chains, and protecting against cybersecurity threats. Unlike some markets, Germany places a strong emphasis on compliance and data sovereignty, which, if not dealt with properly, might result in AI project failures. Given many German organizations' heavy legacy technology stacks, ensuring that new AI projects will seamlessly integrate is key.

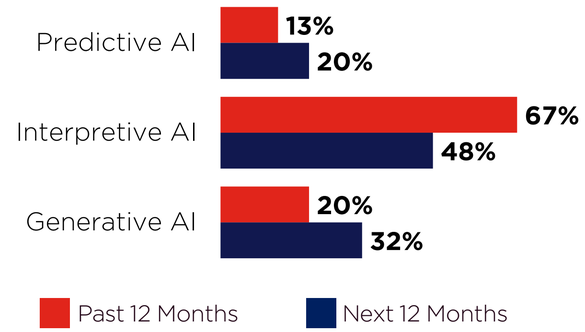
Business Priorities for 2025

1. Improving employee productivity
2. Optimizing supply chain/inventory
3. Reducing business risk & cyber threats
4. Applying emerging AI technologies (e.g., generative AI)
5. Enhancing decision making

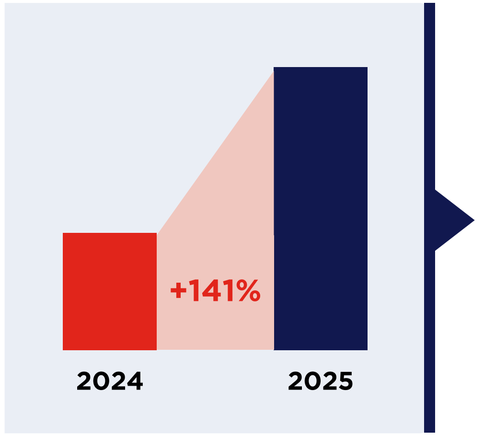
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

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

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. GRC requirements/security issues
2. Data quality issues
3. Lack of budget or management buy-in
4. Unrealistic expectations from senior management
5. Application latency/performance issues

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

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Germany n=100

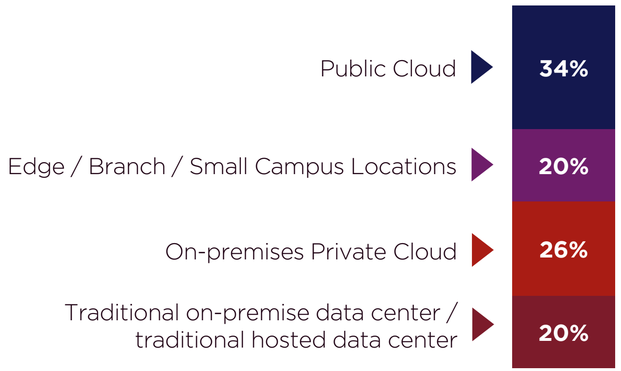
Germany Overview (continued)

Data quality challenges persist as one of the key inhibitors for German organizations. The German market distinguishes itself with as-a-service pricing priorities when looking for partners. Additionally, organizations seek partners offering flexible AI modeling support and comprehensive technological solutions. Organizations are increasingly adopting hybrid models to address integration challenges. The 12% of organizations extensively using AI-powered PCs reflects moderate adoption, close to the regional average.

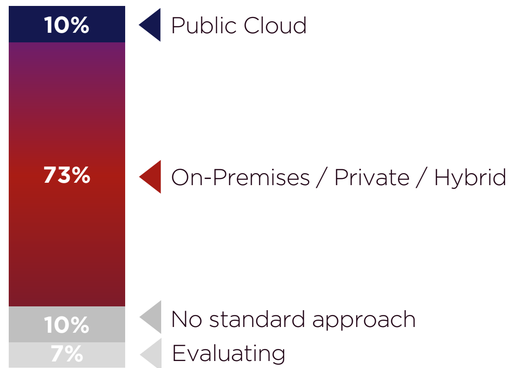
Survey Insights

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

Overall **Infrastructure** Deployment – Next 12 Months



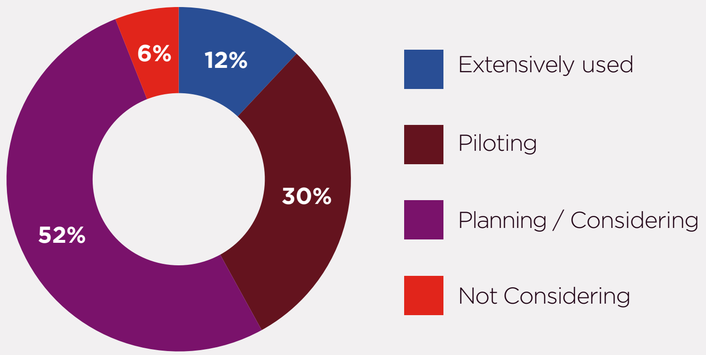
Primary **Infrastructure** Approach to **AI Workloads**



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 AI modeling & development
4. Support for data management

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Germany n=100

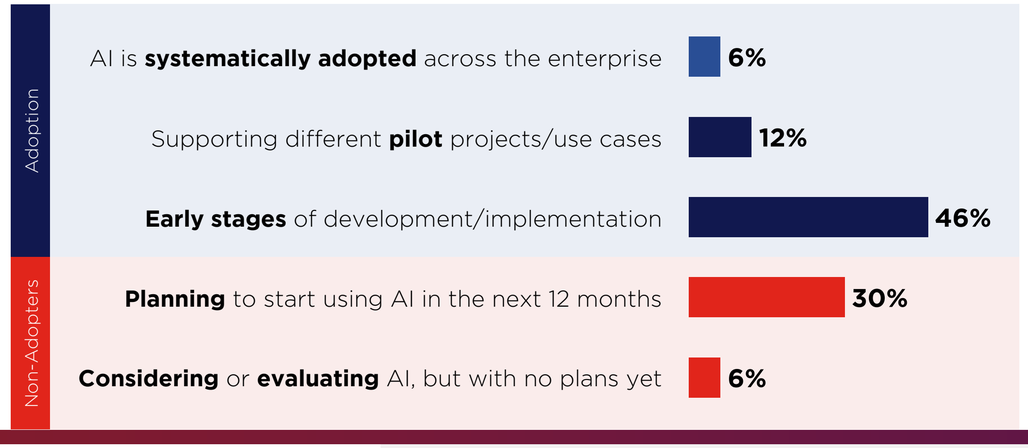
Italy Overview

In Italy, regulatory compliance and cybersecurity are among the leading business priorities potentially driving AI adoption, and organizations appear to be relatively conservative in their current levels of AI adoption (with low levels of adoption of generative AI in particular standing out). Application latency and cost constraints remain common hurdles that CIOs will need to address. Italian organizations also face challenges with senior management buy-in, budgeting, and managing expectations of those in charge.

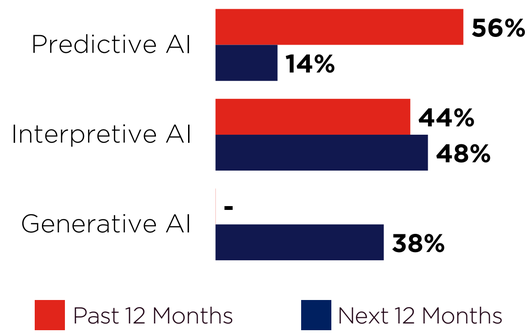
Business Priorities for 2025

1. Improving regulatory compliance
2. Reducing business risk & cyber threats
3. Applying emerging AI technologies (e.g., generative AI)
4. Driving digital business innovation
5. Decreasing costs

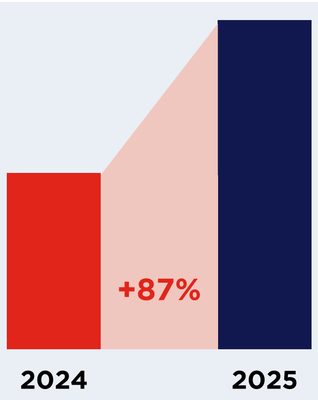
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

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

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Application latency/performance issues
2. Unrealistic expectations from senior management
3. IT infrastructure/network costs
4. Lack of budget or management buy-in
5. Unavailability or cost of AI expertise

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

1. Ease of integrating AI with existing systems & processes
2. Availability of quality data
3. Access to adequate hybrid compute & storage resources
4. Availability of AI-powered PCs & edge devices
5. Ensuring data sovereignty & compliance

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Italy n=50

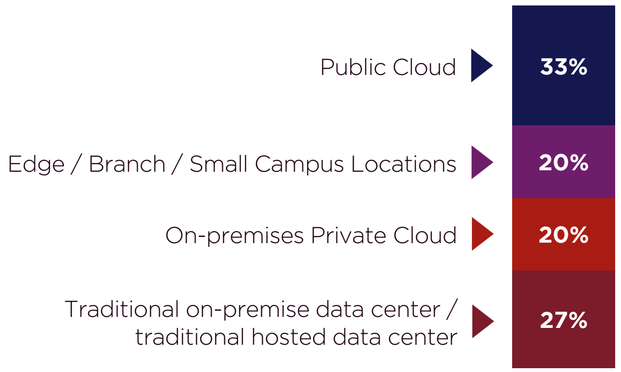
Italy Overview (continued)

With 40% of organizations focusing on developing data management capabilities, Italy ranks highest among surveyed countries in this respect. Italy stands out as a market where organizations primarily seek external support with a focus on AI modeling and development—organizations want partners with core technology expertise, support for data management, and partnerships that deliver measurable business outcomes. The slightly higher than regional average reliance on the public cloud for AI workloads reflects the duality of tradition and innovation: while some sectors, like government, might be slower to adopt, others, particularly those operating globally, such as manufacturing, are open to leveraging the public cloud. Only 4% extensively use AI-powered PCs, suggesting significant transformation potential.

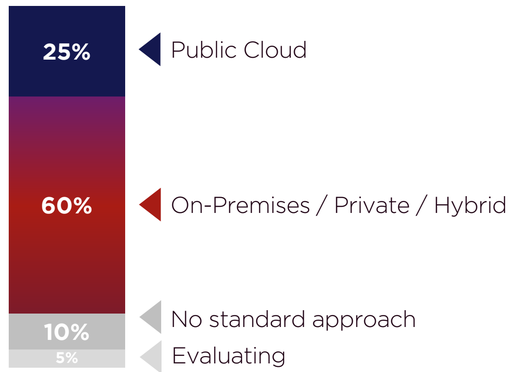
Survey Insights

40% of organizations highlighted that they will be developing **data management capabilities** in the next 12 months.

Overall **Infrastructure** Deployment – Next 12 Months



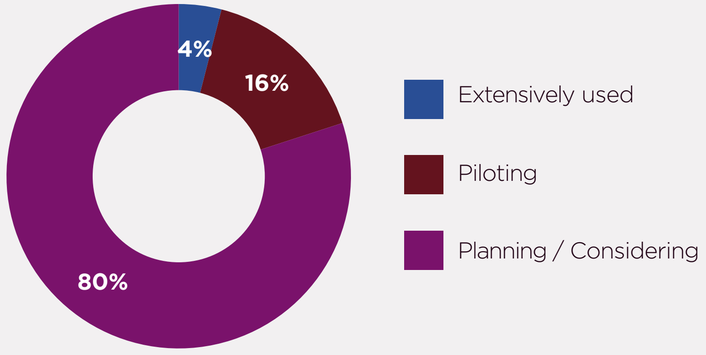
Primary **Infrastructure** Approach to **AI Workloads**



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

1. Support for AI modeling & development
2. AI knowledge & expertise (including scaling AI solutions)
3. Support for data management
4. Ability to help our organization deliver measurable business outcomes

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Italy n=50

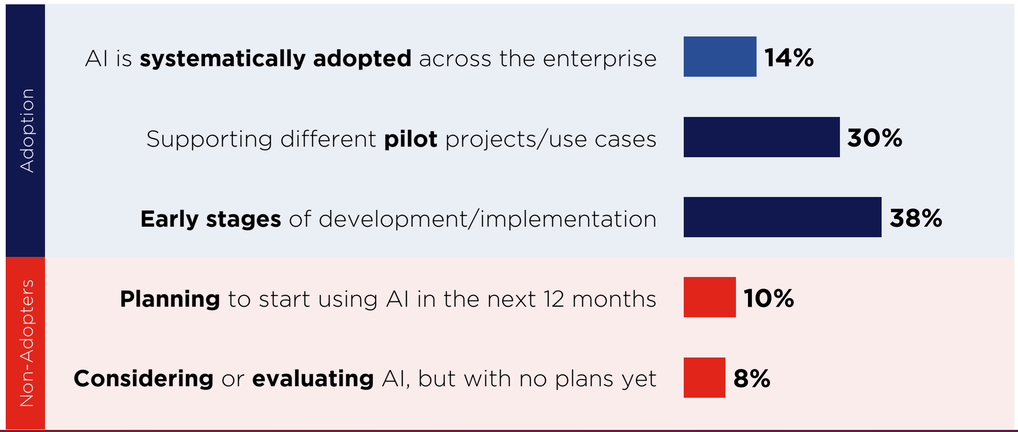
Middle East Overview

The Middle East positions itself as a hub for AI-driven innovation, with a focus on supply chain optimization, business agility, and growth. AI has so far found success primarily in technology-related lines of business in organizations in the Middle East, but as generative AI emerges, it will be leveraged across a much wider variety of business functions. Organizations in the Middle East are strongly focused on ensuring data sovereignty and compliance, and are more interested than others in being able to find and work with strong AI partners.

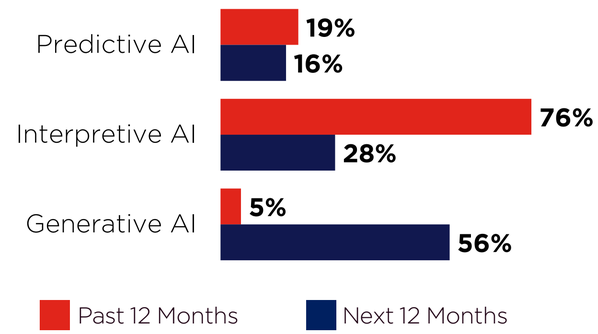
Business Priorities for 2025

1. Optimizing supply chain/inventory
2. Increasing business agility & responsiveness
3. Increasing revenues & profit growth
4. Driving digital business innovation
5. Enhancing decision making

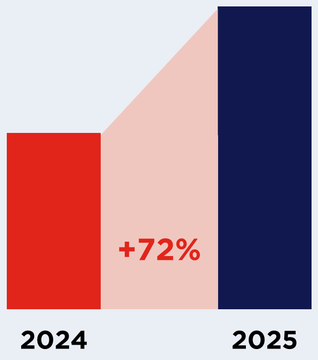
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. Engineering/R&D
2. IT Ops
3. Cybersecurity
4. Software Development
5. Supply Chain

Inhibitors That Resulted in AI Projects Not Meeting Expectations

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

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

1. Ensuring data sovereignty & compliance
2. Access to partners with strong AI capabilities
3. Employee training & upskilling
4. Access to adequate hybrid compute & storage resources
5. Ease of integrating AI with existing systems & processes

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Middle East n=50

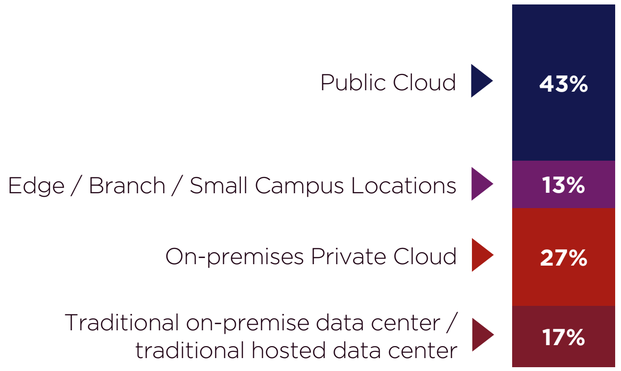
Middle East Overview (continued)

In the Middle East, 40% of organizations plan to develop data management capabilities. For partner value, the region emphasizes data security and AI expertise. The reliance on the public cloud highlights the commitment to scalability and modernization. Still, almost 8 in 10 organizations in the region prefer to run AI workloads on-premise or in private or hybrid environments. Organizations in the Middle East show more interest in AI-powered PCs, with 14% extensively using them.

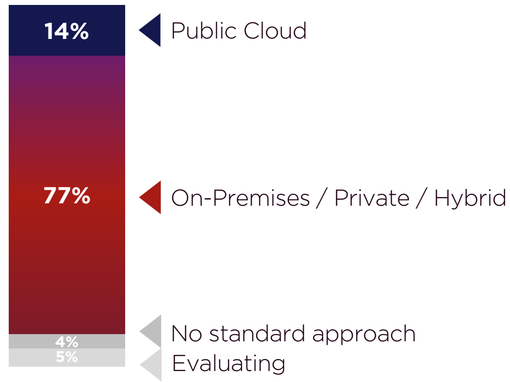
Survey Insights

40% of organizations highlighted that they will be developing **data management capabilities** in the next 12 months.

Overall **Infrastructure** Deployment – Next 12 Months



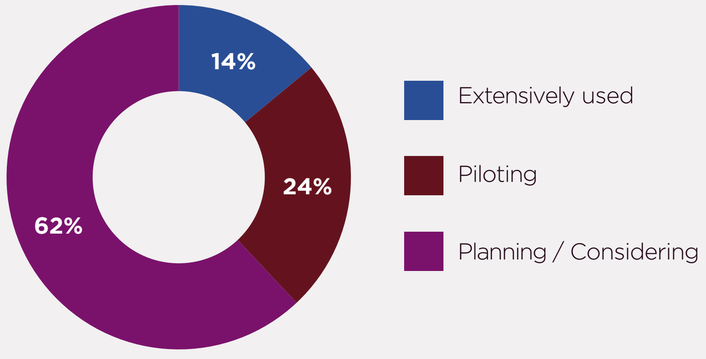
Primary **Infrastructure** Approach to **AI Workloads**



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

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

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Middle East n=50

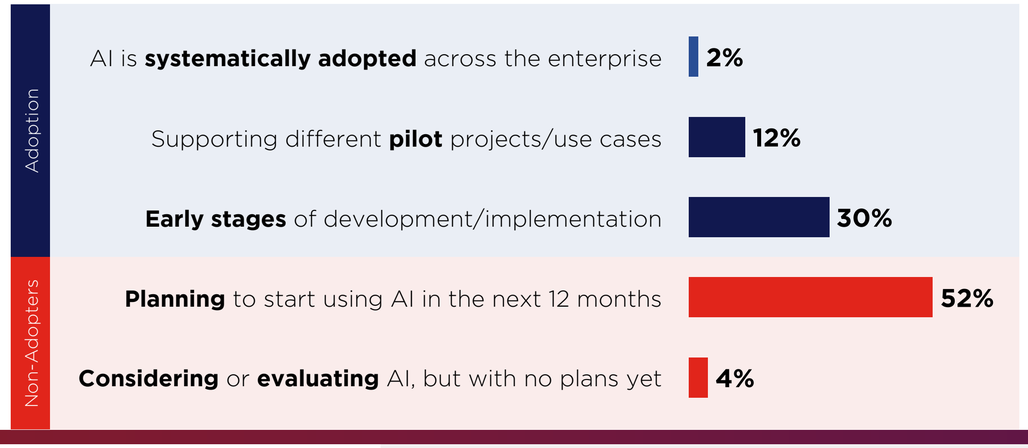
Netherlands Overview

The Netherlands stands out for its emphasis on enhancing customer satisfaction and revenue growth through AI. AI drives much of the innovation in IT operations and supply chain management, enabling businesses to operate more responsively and efficiently. Still, more than half of organizations are only starting to plan for AI deployments. Challenges such as endpoint deployment and performance issues suggest that businesses must focus on optimizing their infrastructure to fully leverage AI's potential.

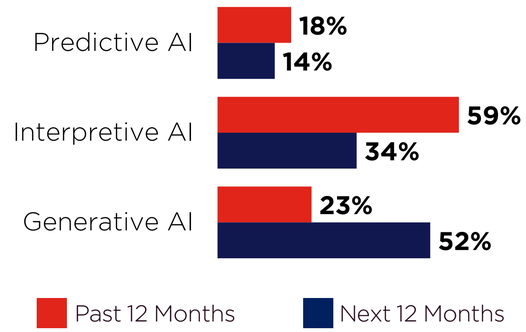
Business Priorities for 2025

1. Improving customer experience & satisfaction
2. Increasing revenues & profit growth
3. Optimizing supply chain/inventory
4. Improving employee productivity
5. Improving regulatory compliance

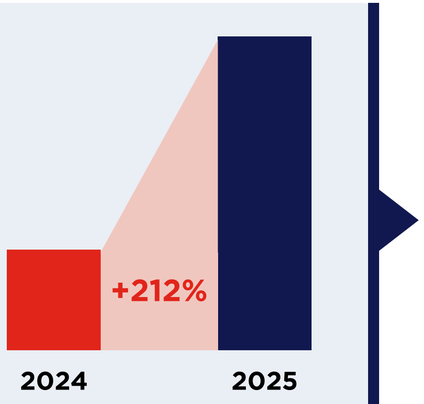
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. IT Ops
2. Supply Chain
3. Facilities
4. Engineering/R&D
5. Finance

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Challenges deploying AI solutions at endpoints
2. Application latency/performance issues
3. Unrealistic expectations from senior management
4. IT infrastructure/network costs
5. Lack of budget or management buy-in

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

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Netherlands n=50

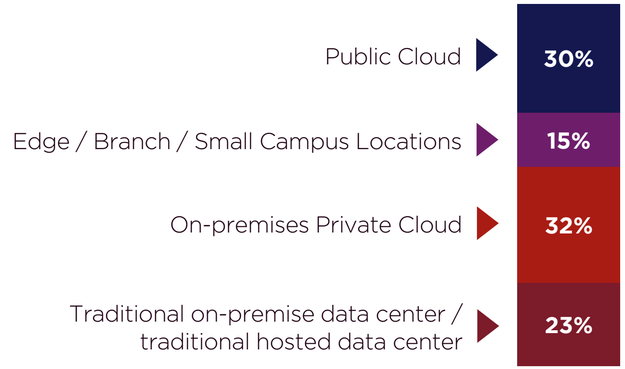
Netherlands Overview (continued)

For Dutch organizations, quality data appears paramount for success. Organizations emphasize the importance of infrastructure and AI modeling expertise they look for in partners. They also seek partners offering comprehensive, flexible AI infrastructure solutions. With only 4% extensively using AI-powered PCs, there is significant room for education around the potential these devices can offer.

Survey Insights

The **availability of quality data** is the **#1 most important success factor** for AI implementation.

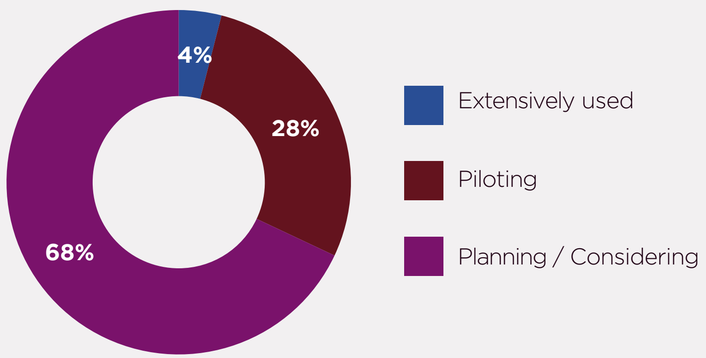
Overall **Infrastructure** Deployment – Next 12 Months



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

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

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Netherlands n=50

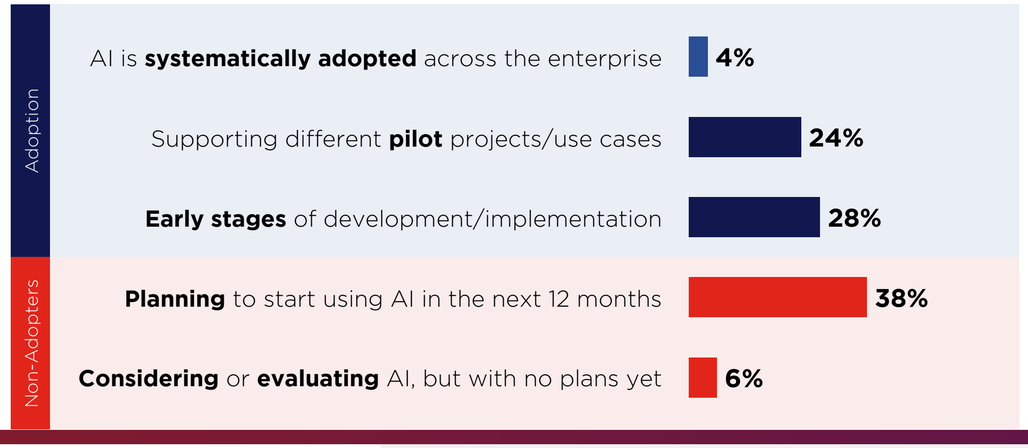
Spain Overview

Spain's approach to AI adoption highlights its focus on innovation, agility, and time-to-market, with AI leading the way in areas like engineering, IT operations, and software development. Generative AI is beginning to have an influence, with more than half of organizations planning to use it within 12 months. This shows Spain's readiness to experiment with emerging technologies. However, scaling remains a challenge, especially for small and medium-sized businesses that struggle with resource constraints.

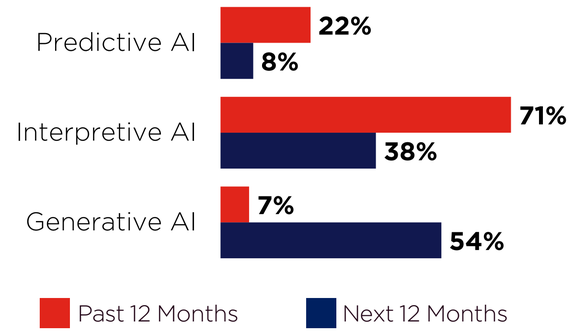
Business Priorities for 2025

1. Driving digital business innovation
2. Accelerating time to market
3. Increasing business agility & responsiveness
4. Reducing business risk & cyber threats
5. Improving regulatory compliance

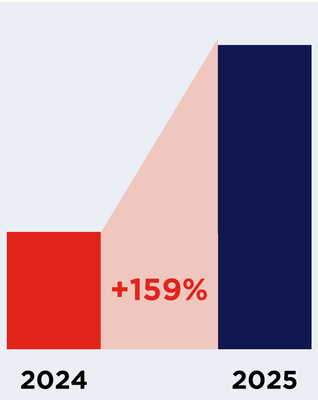
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

1. Engineering/R&D
2. IT Ops
3. Software Development
4. Procurement
5. Cybersecurity

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Challenges scaling AI across the enterprise (including lack of departmental support)
2. Challenges deploying AI solutions at endpoints
3. Data quality issues
4. Problems integrating AI with existing systems & processes
5. Unavailability or cost of AI expertise

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

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Spain n=50

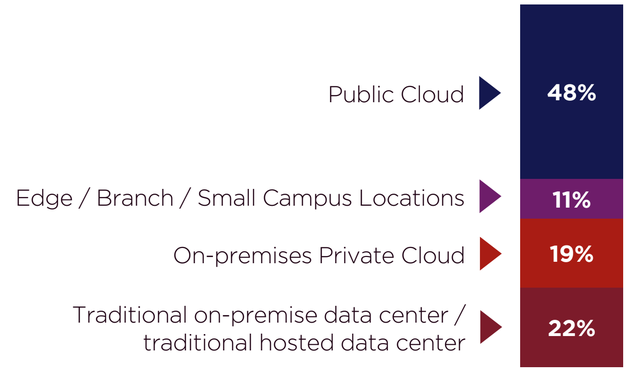
Spain Overview (continued)

Spain experiences data quality challenges similar to broader EMEA trends. Data management and infrastructure support are key partner selection criteria. Beyond the technical aspects, Spain's AI journey reflects a strong emphasis on collaboration, with partnerships often crossing private and public sectors. From a devices perspective, Spain is somewhat conservative in AI adoption, with 6% extensively using AI-powered PCs.

Survey Insights

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

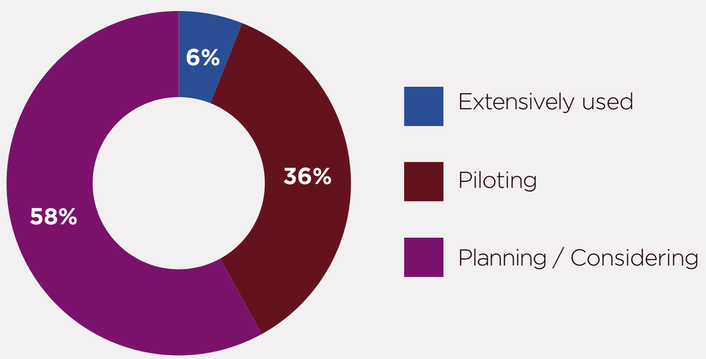
Overall **Infrastructure** Deployment – Next 12 Months



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

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

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Spain n=50

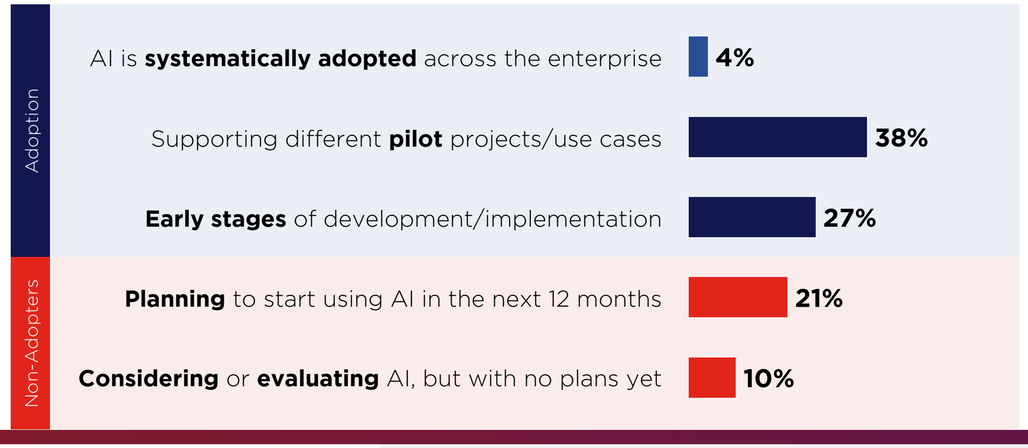
United Kingdom Overview

The UK focuses on regulatory compliance, improving customer experiences, and fostering innovation, all of which can be supported with AI. AI is adopted across all business functions, from IT operations and cybersecurity teams to marketing and sales, and interest in generative AI is already strong. Hybrid infrastructure models, which combine public and private clouds, are key enablers for scaling these efforts. Data quality and the right infrastructure platform need to be in place, as AI projects require a strong foundation to succeed. As a more mature market, AI spending growth in the UK is marginally lower than the regional average.

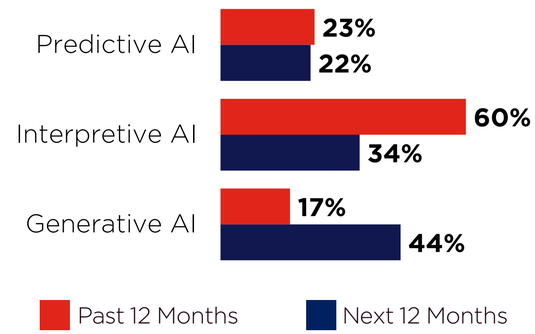
Business Priorities for 2025

1. Improving regulatory compliance
2. Driving digital business innovation
3. Increasing business agility & responsiveness
4. Improving customer experience & satisfaction
5. Applying emerging AI technologies (e.g., generative AI)

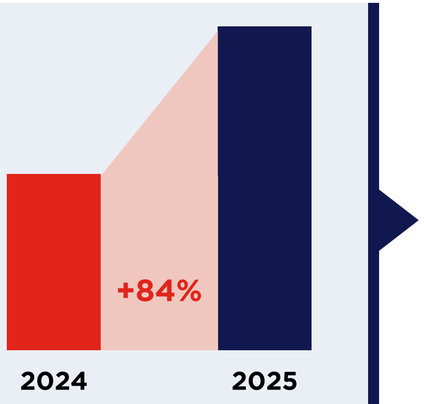
Current **AI Adoption**



AI Implementations by Category: Past and Future



Growth in AI as a % of IT Spend



Business Functions Adopting AI Use Cases

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

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. IT infrastructure/network costs
2. Data quality issues
3. GRC requirements/security 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. Ease of integrating AI with existing systems & processes
2. Access to partners with strong AI capabilities
3. Availability of quality data
4. Availability of internal AI expertise
5. Employee training & upskilling

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, United Kingdom n=100

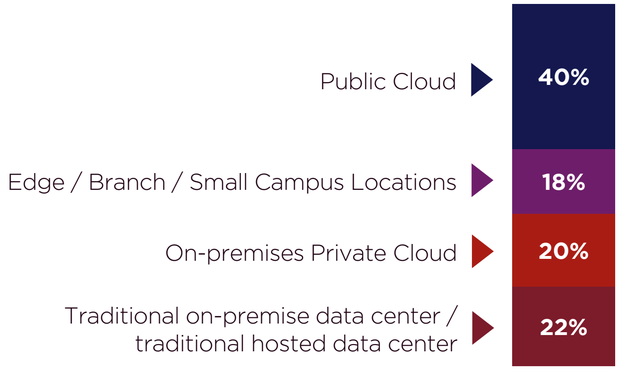
United Kingdom Overview (continued)

Data quality issues are recognized as a significant challenge in AI project implementation within UK organizations. As a result, UK organizations tend to seek out partners with data management expertise, as well as technical AI knowledge and expertise. Despite the UK market being strong adopters of the public cloud in general, UK organizations are looking towards hybrid infrastructure models, which combine public and private resources, to run AI workloads. AI-powered PC use is above the regional average, with 15% extensively using these types of devices.

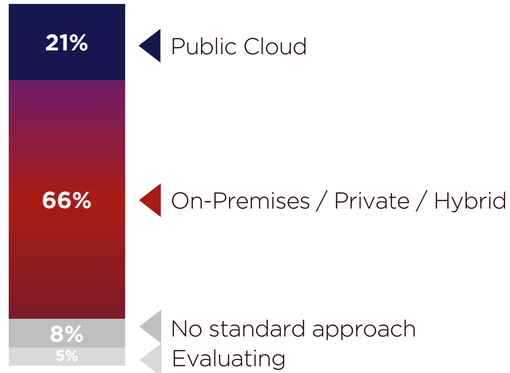
Survey Insights

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

Overall **Infrastructure** Deployment – Next 12 Months



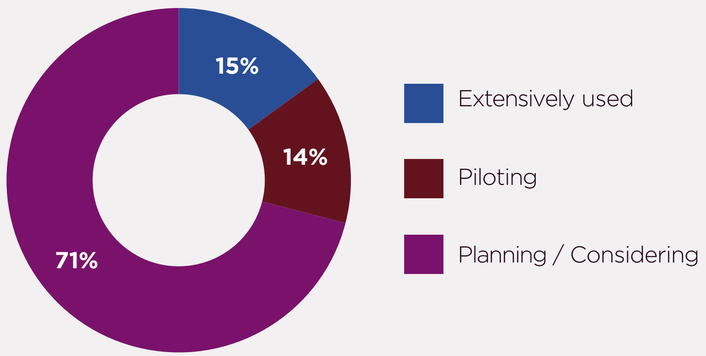
Primary **Infrastructure** Approach to **AI Workloads**



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

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

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



Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, United Kingdom n=100

Research Methodology

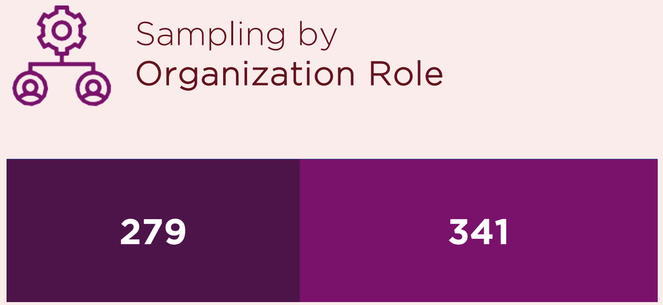
CIO Playbook 2025 Research Methodology

The playbook was developed based on **620 respondents**, with the following sampling breakdown:

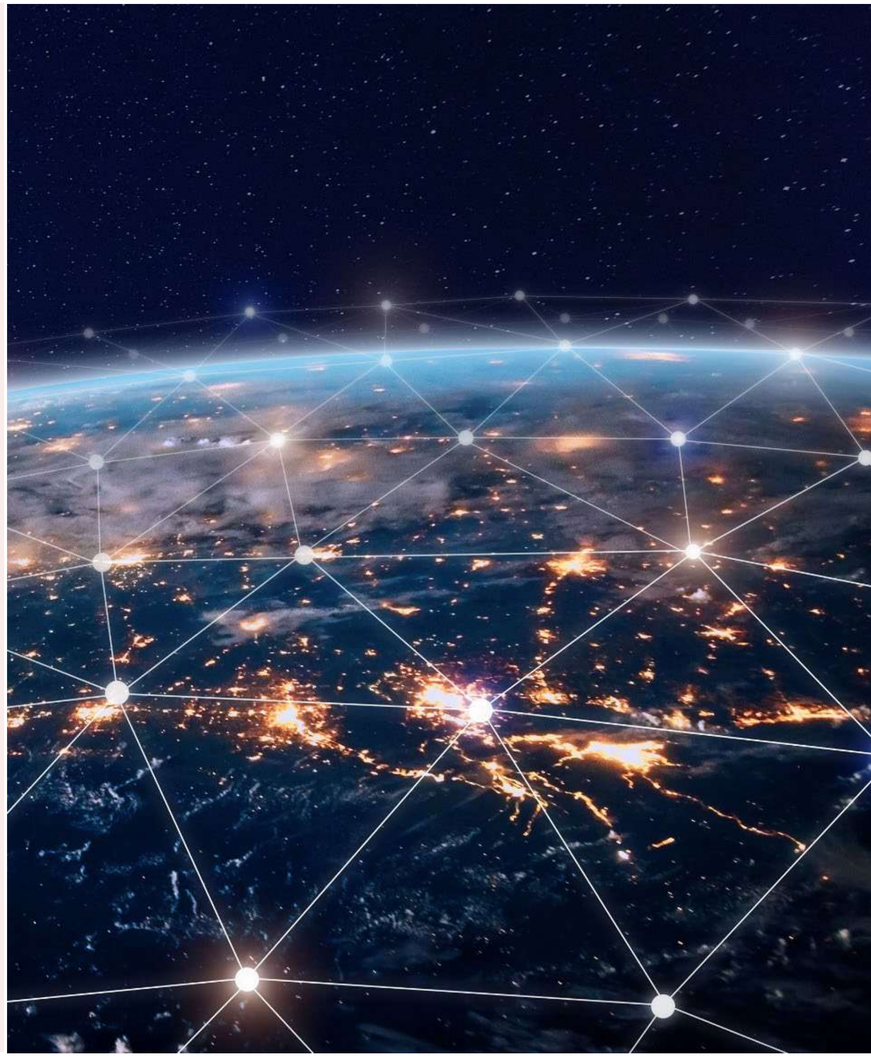
Markets Covered	Sample Size
Denmark	**50**
Eastern Europe	**70**
France	**100**
Germany	**100**
Italy	**50**
Middle East	**50**
Netherlands	**50**
Spain	**50**
United Kingdom	**100**

Industries Covered	Sample Size
BFSI	**137**
Retail	**82**
Manufacturing	**55**
Telco / CSP	**92**
Healthcare	**55**
Government	**39**
Others	**160**

Sampling by Organization Role



Sampling by Employee Size



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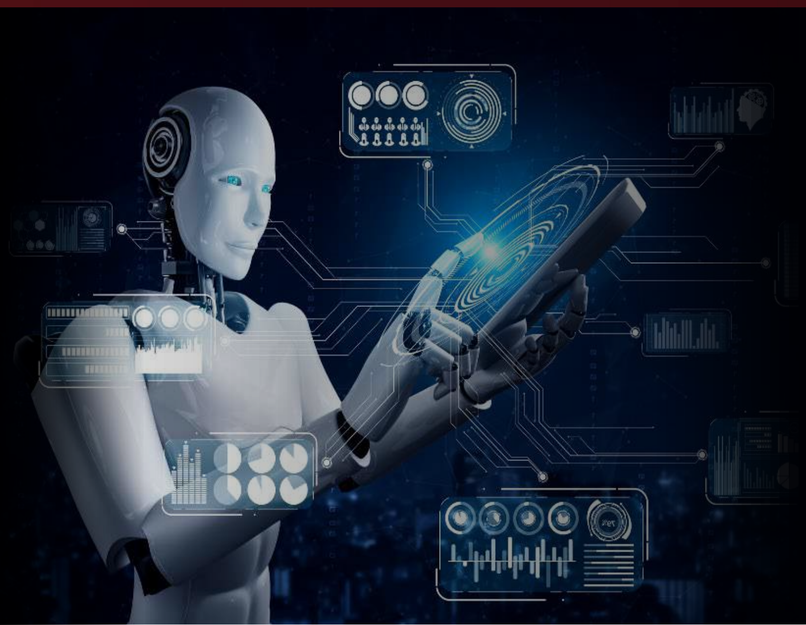

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Data	Lenovo Hybrid AI Data Platforms	NVIDIA NeMo Retriever*
Infrastructure	Lenovo Neptune	Lenovo ThinkSystem	Lenovo ThinkStation	Lenovo xClarity / LiCO
	NVIDIA GPU / CPU / DPU / Networking	

Framework as of January 2025

* Available with NVIDIA AI Enterprise

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