LENOVO
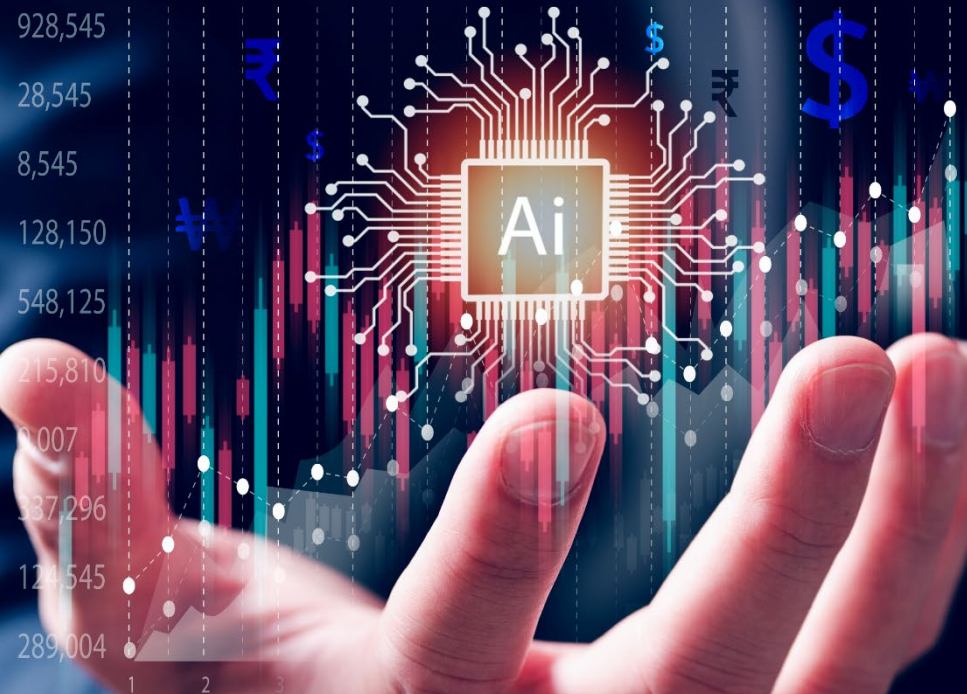
Asia/Pacific

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 again commissioned IDC to conduct a study to understand how organizations globally have fared with their artificial intelligence (AI) journeys. This ebook draws insights from custom research, surveying 900 IT and business decision-makers from mid-to-large organizations in Asia/Pacific including Japan (APJ).

AI-nomics From an Enterprise Perspective

The research highlights the shifting priorities of APJ enterprises, which are now focusing on business outcomes rather than just the AI technology itself. APJ enterprises increasingly recognize and prioritize the transformative impact of AI. The research found that there will be a notable shift in AI spending toward generative AI (GenAI) in 2025, and a greater focus on back-office/operational AI use cases, particularly in IT, where organizations have seen the most success so far. Expectations are high and businesses aren't just looking for financial returns — expecting an average 3.6x* return in APJ — but also the operational and productivity benefits that come with successful AI implementation.

Investment Priorities for the Next Wave of AI Implementation

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

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

*Source: IDC WW AI Use Case Survey Special Report. August 2024; Asia/Pacific n = 919.
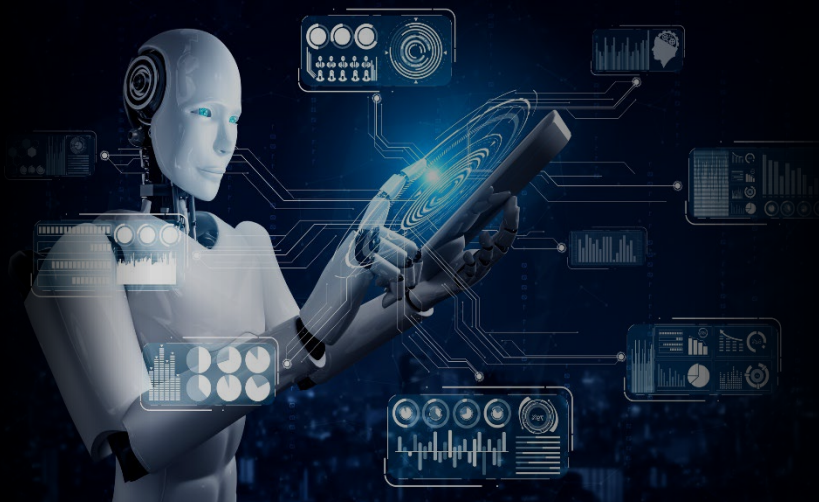
CIO Strategic Imperatives

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

The AI Journey: Where We Are Now and Where We're Headed

	Insights	Considerations for CIOs for 2025
1	**Business Priorities** Moving beyond the fear of missing out (FOMO) to focused investments: Organizations in APJ are realigning their AI technology strategies to prioritize building core foundations that enable high-value business outcomes.	Ensure that AI initiatives are directly tied to measurable business outcomes. AI will be ubiquitous, cutting across business functions and industries. CIOs must work closely with business leaders to identify use cases that drive revenue growth, cost reduction, or operational efficiency, emphasizing ROI as the primary success metric. **Action:** Prioritize cross-functional collaboration to integrate AI into core business strategies. Develop frameworks to evaluate AI investments.
2	**AI Adoption** AI spending as a proportion of IT spend is set to grow exponentially by 3.3x, with a focus on data, infrastructure, edge AI, and AI application development.	Organizations must adopt future-proof IT ecosystems by investing in scalable, secure, and AI-ready infrastructure. CIOs must ensure that foundational elements like data storage, pipelines, and processing capabilities can handle the anticipated growth. Organizations must establish robust data management foundations before making significant AI investments. **Action:** Create a roadmap for upgrading data infrastructure, ensuring interoperability. Leverage AI governance to ensure data quality, compliance, and ethical use.
3	**AI Investment & Sentiment** In 2025, 41% of AI investments will flow to GenAI, a marked jump from 2024. GenAI initiatives will focus on building a portfolio of use cases across ITOps, software development, cybersecurity, and supply chain.	CIOs must anticipate and identify next-generation opportunities for GenAI. Collaborating with stakeholders across business units will be essential to uncover nuanced, future-focused use cases (e.g., intelligent automation, advanced data analytics) that align with evolving business needs. **Action:** Facilitate cross-functional ideation and build a use-case incubator. Collaborate with stakeholders to continually refine GenAI deployments based on user feedback.

CIO Strategic Imperatives (continued)

Building Strong AI Foundations

	Insights	Considerations for CIOs for 2025
4	**AI Data** Poor data quality is a major obstacle to AI success, driving organizations to prioritize governance, data management, and analytics capabilities.	CIOs must double down on data and take proactive steps to ensure that organizational data is accurate, consistent, well-structured, and readily accessible, forming a reliable foundation for successful AI initiatives and driving actionable insights. Action: Invest in data platforms and implement strong data governance frameworks to enhance data quality, security, and compliance, while simultaneously upskilling teams in advanced data analytics for AI-driven decision-making and innovation.
5	**AI Governance & Compliance** There is a need for a structured approach to governance, risk, and compliance (GRC) that ensures ethical AI frameworks, accountability, and reliability from the outset, rather than treating governance as an afterthought.	CIOs must establish a structured governance framework to ensure ethical AI practices, accountability, and operational reliability from the start. They should proactively address the real risks of AI by integrating governance into AI strategy planning, aligning it with business objectives, and ensuring compliance with regulations. Action: Define clear policies for ethical AI use, implement tools to monitor risks, and foster cross-functional collaboration to embed governance into every stage of AI development and deployment.
6	**AI Services** 46% of organizations plan to prioritize AI service providers that offer a clear data and AI strategy, hybrid architecture, and strong privacy and security frameworks to bridge critical gaps in their internal capabilities.	CIOs recognize that strategic partnerships with external providers are critical to accelerating AI deployment. They must select AI service providers who deliver scalable hybrid infrastructure, robust data management solutions, and strong governance practices. Action: Establish clear service-level agreements (SLAs) and key performance indicators (KPIs) with AI service providers, outlining expected ROI and clear timelines for proof of concept (POC) and moving projects to production. Ensure knowledge transfer and build internal AI expertise to gradually reduce dependency.
7	**AI Infrastructure** 65% of organizations have highlighted that their AI workloads will primarily be on-premises or on hybrid cloud.	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-premises solutions for sensitive AI workloads or those with strict latency and compliance requirements.
8	**AI Devices** 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 medium term.	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.

Asia/Pacific Insights

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Business Priorities
Moving Beyond Technology to Business Outcomes

Business Priorities in APJ

	2024	2025	YoY Change
Improving regulatory **compliance**	12	1	+12
Improving employee **productivity**	7	2	+5
Driving digital business **innovation**	4	3	+1
Improving **sustainability**	5	4	+1
Increasing business **agility** & **responsiveness**	6	5	+1
Applying emerging **AI technologies** (e.g., GenAI)	1	6	-5

Considerations for CIOs

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.

▶ **Transforming FOMO into high-value business outcomes:** Over the past 18 months, organizations in APJ were driven into AI investments by the fear of missing out, as the excitement of GenAI's potential took hold. Now that the initial scramble to implement AI/GenAI solutions is over, they can shift to investing in the core foundations needed to deliver that value. AI in APJ is shifting from an emerging trend to mainstream.

▶ **Shift to business priorities centered on compliance, productivity, and innovation:** Technology investments must be tied to business value and deliver organizational resilience and improved responsiveness to changing market conditions. CIOs must design a strategic roadmap with clearly prioritized use cases that deliver specific business outcomes. Real ROI is demanded from AI.

▶ **Regulatory compliance has become a top priority** due to evolving data privacy laws, policies on ethical AI standards, and geopolitical pressures. AI adoption has added complexity through challenges like building transparency and mitigating bias.

▶ **Improving employee productivity** has grown in importance as organizations leverage AI tools to enhance workflows, reskill employees, and drive innovation amid hybrid work models and rising operational demands.

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

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AI Adoption
Evolving Beyond AI Experimentation to Scaling AI Production

Non-Adopters

Considering or **evaluating** AI, but with no plans — **17%**

Planning to start using AI in the next 12 months — **39%**

Adopters

Early stages of development/implementation — **15%**

Supporting different **pilot** projects/use cases — **22%**

AI is **systematically adopted** across the enterprise — **7%**

► **AI adoption in APJ is occurring in two waves:** large companies are adopting aggressively, while smaller firms are catching up. With 56% of organizations still evaluating or planning AI investments, many recognize its potential to boost efficiency, decision-making, and competitiveness as industries shift toward data-driven strategies and automation.

► **Challenges:** However, they face challenges such as inadequate data quality, integration issues with existing systems, high implementation costs, and a lack of skilled talent to design, deploy, and scale AI solutions effectively.

► **AI experimentation:** Organizations in APJ are in the early-mid stages of AI adoption and are in a phase of hyper-experimentation. Over the past 18–24 months, there has been a scramble to develop and test various AI and GenAI solutions.

► **Limited success:** Many organizations attempted multiple POCs with a view to scale them to production, but success has been limited. Less than 10% of total POCs were actually deemed successful, having met predefined business goals and metrics.

Supplementary Insights

23	**3**	**62%**
AI POCs	AI production launches	"Successful" AI production launches

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

► **Focusing on the foundations:** APJ organizations are moving beyond AI experimentation, integrating technology into strategic roadmaps with clear business outcomes. They are focusing on how AI/GenAI can address business needs and investing in core foundations to drive value. With better use case selection and stronger foundations, AI projects in production are set to grow significantly.
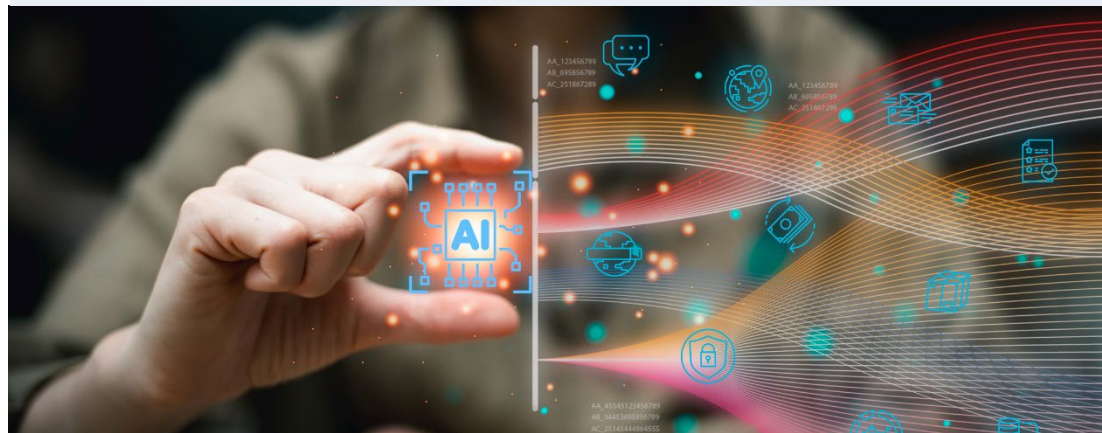
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AI Investment & Sentiment (1/4)

Tectonic AI Shift Underway: Leveraging Data and Infrastructure for Success

Growth in AI as a % of IT Spend

3.3x

2024   2025
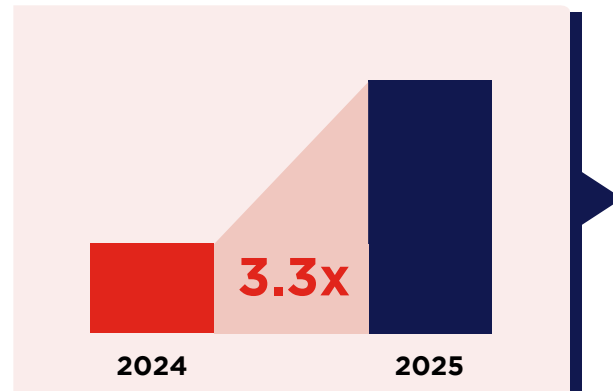
Top AI Investments in the Next 12 Months

1	**Data science** & business intelligence
2	Cloud computing **infrastructure** for AI
3	**Data management** & governance
4	**Datacenter** & **edge** AI infrastructure
5	AI-embedded **applications**
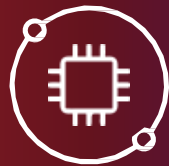
APJ Organizations expect, on average, a **3.6x ROI** from their AI initiatives

Source: IDC syndicated survey

▶ **Exponential AI spending growth of 3.3x** (as a % of IT spend) is expected in 2025, with a focus on data and infrastructure.

▶ **Expectations are high for AI investments:** IDC research shows that most organizations expect a 3.6x return on investment. However, organizations may not have the maturity to successfully scale AI, so the focus shifts to building internal capabilities.

▶ **Building core foundations:** IDC has identified seven areas for building the future AI-fueled business: AI Strategy, Applications, AI Platforms, AI Infrastructure, Governance, Data, and AI Skills. Over the next 12 months, the data clearly shows organizations in APJ will focus on building data foundations, an enterprise intelligence architecture, and hybrid cloud and edge infrastructure (including AI-ready devices).

▶ **Embedded AI for quick ramp-up:** For those pursuing quick wins, adopting enterprise software platforms with embedded AI will allow organizations to get on the AI ladder faster, with relatively lower risks.

Considerations for CIOs

CIOs must prepare their organizations for the AI era by driving investments in data science, cloud infrastructure, and robust data management, while building scalable AI platforms to accelerate adoption and deliver sustainable business outcomes.

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

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AI Investment & Sentiment (2/4)

GenAI Hype to Fuel Increased Investments in ITOps, Software Development, and Cybersecurity Use Cases

AI Implementations by Category: Past and Future

Category	Past 12 months	Next 12 months
Predictive AI	21%	23%
Interpretive AI	68%	36%
Generative AI	11%	41%

■ Past 12 months ■ Next 12 months
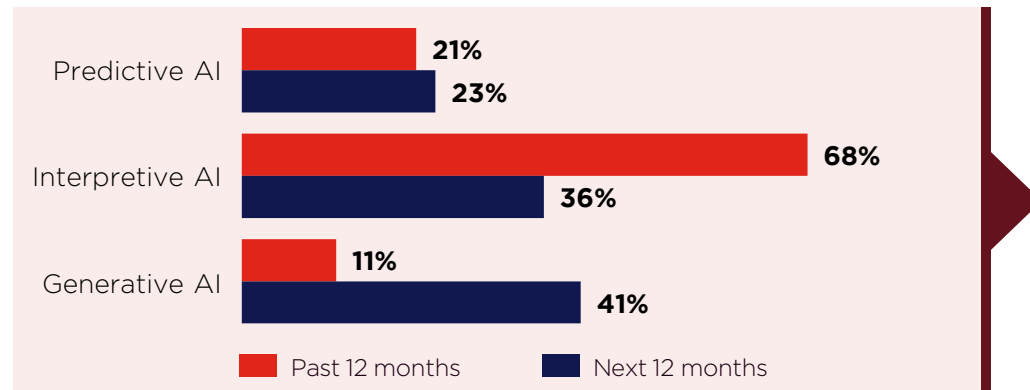
Note: Only AI adopters were eligible to answer for the past 12 months

Business Functions Adopting AI Use Cases

1	IT Ops
2	Cybersecurity
3	Software development
4	Engineering/R&D
5	Supply chain

IDC Observation
APJ organizations are mostly prioritizing back-office use cases.

► **GenAI has been the driving force** for much of the new AI investment. IDC's data shows that GenAI spending growth will come at the expense of interpretative AI investment, although predictive AI investments will grow slightly. In the future, most businesses will integrate the capabilities of GenAI, predictive AI, and interpretative AI to create holistic solutions that address a wide range of business needs.

► **IT-related business functions prioritized:** ITOps, cybersecurity, and software development have been the focus over the past 12 months. These areas lend themselves to high-impact AI use cases such as code generation, DevOps optimization, and machine learning operations (MLOps) for managing machine learning workflows, streamlining processes, and accelerating innovation. They have data readily available and skilled personnel, so implementation is relatively easier.

► **Focus on strategic use case prioritization:** As early projects move to production, organizations will expand their AI use case portfolio, implementing more use cases in front and back-office functions, such as supply chain and marketing.

► **Buy vs Build vs Compose:** IDC's research shows that just over half of APJ organizations will 'compose' AI solutions by combining fine-tuning, building, and buying models. Few will 'build' from scratch due to high costs and limited capabilities, a strategy reserved for large enterprises with resources to train their own large language models (LLMs). Less mature organizations will favor 'buying' AI solutions with embedded GenAI for faster productivity gains, but off-the-shelf tools are limited, pushing businesses towards composing solutions for more complex use cases.

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

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AI Investment & Sentiment (3/4)

Adopters are Generally Satisfied with AI Investments, but Doubts Persist

Has AI Met Expectations of AI Adopters?

6%   61%   33%

- Fell short of expectations
- Met expectations
- Exceeded expectations
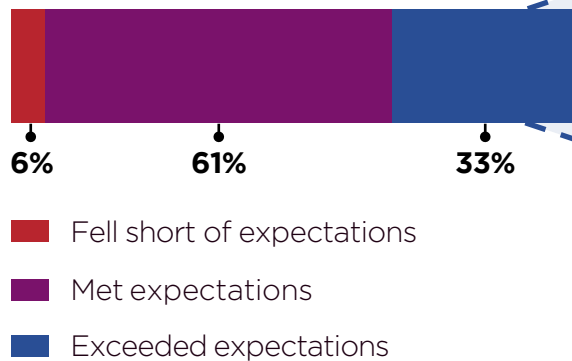
Early Successes

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

#1	#2	#3
IT Ops Top Use Cases	**Software Development** Top Use Cases	**Cybersecurity** Top Use Cases
▸ **FinOps** use cases	▸ **Planning** use cases	▸ **Application security** use cases
▸ **End-user** experience use cases	▸ **Development** use cases	▸ **Compliance** use cases

Management Sentiment Toward AI (AI Adopters)

36%   52%   12%

- Neutral/some reservations/skeptical
- Generally positive
- Highly enthusiastic
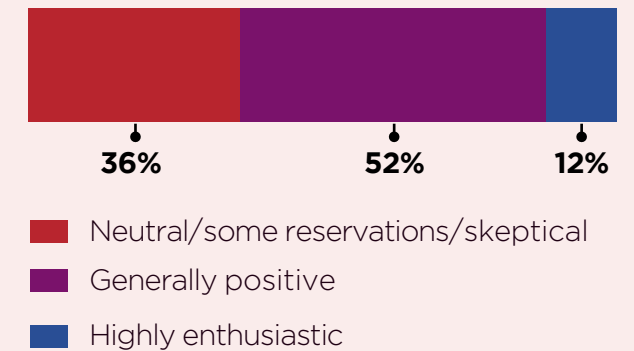
▸ **Business and process changes needed:** AI is expensive and often doesn't lead directly to P&L improvements without significant organizational changes, which many firms have yet to implement. While 94% of adopters say AI meets expectations, 36% of management remains skeptical due to inconsistent ROI and real business outcomes. This creates tension between IT teams, seeking to justify AI investments and secure future funding, and LOB leaders who question the value delivered. Closer IT-LOB alignment is essential to ensure AI investments translate into tangible business value.

▸ **Delivering ROI for AI** is a long-term endeavor that requires balancing AI experimentation and scaling projects. Many POCs fail, and the remaining AI initiatives in production must return even higher ROI to cover the cost of unsuccessful projects. This can be managed with careful strategic roadmap planning, use case selection, and prioritization.

▸ **Organizations must develop an AI agentic 'workforce'** that will work with humans and transform how business functions operate. AI agents, retrieval-augmented generation (RAG), and model tuning based on internal enterprise data will enable more tailored and efficient solutions for specific business challenges.

▸ **AI adopters report the best results in IT-related use cases,** with technology-focused areas like IT operations, cybersecurity, and software development being the initial targets for AI implementation. Investments in GenAI tools for use cases such as FinOps, end-user experience, code generation, development, and compliance are set to enhance performance and drive greater automation across these functions.

Considerations for CIOs

Back-office AI implementations in IT operations, software development, and cybersecurity are ideal early wins for CIOs due to their direct impact and minimal cross-departmental dependencies. Prioritizing these areas builds early momentum before expanding into broader, more complex use cases requiring extensive buy-in from other departments.

For example, GenAI-enabled FinOps and end-user experience in ITOps or application security and compliance in cybersecurity can deliver quick, tangible results.

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

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AI Investment & Sentiment (4/4)

Delivering on AI-nomics: Address Roadblocks by Bridging the Skills Gap and Solving the Data Conundrum

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1	**Data quality** issues
2	Problems **integrating AI** with existing systems/processes
3	Lack of **budget** or **management buy-in**
4	IT **infrastructure**/**network costs**
5	Application **latency/performance** issues

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

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

Organizations should

"go slow to go fast"

by initially concentrating on foundational capabilities — such as data, infrastructure, skills, and governance — before moving forward with large-scale AI investments. The research underscores the importance of this approach, emphasizing that building a strong foundation first helps to minimize risks, ensure scalability, and maximize return on investment over time.
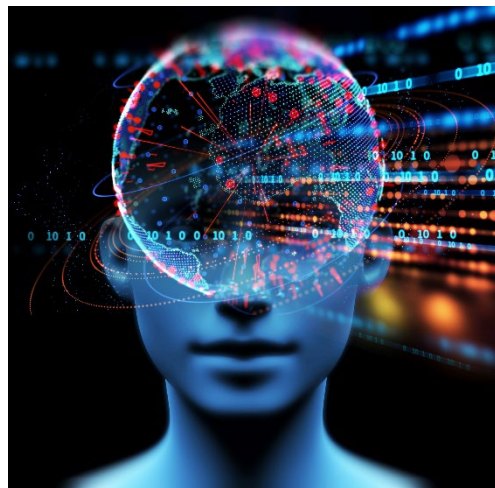
▶ **Align AI strategy with business goals:** Take a long-term approach by creating an AI strategy that aligns with business priorities and includes a clear roadmap for scaling AI from POCs to production. Ensure budgets support sustainable, incremental progress rather than rushed, unfocused initiatives.

▶ **Prioritize data quality:** Address foundational data issues such as inconsistency, incompleteness, and unstructured data before scaling AI investments. High-quality, compliant data is critical to build trust, meet regulatory requirements, and enable successful AI outcomes.

▶ **Develop a robust data fabric:** Establish a unified and scalable data architecture to ensure seamless access, sharing, and governance of data across the organization — this helps to avoid bottlenecks as AI projects grow in complexity.

▶ **Invest in skills and expertise:** Build internal AI expertise by upskilling employees and leveraging external partnerships where necessary. This ensures a strong knowledge base to effectively navigate AI complexities and integrate solutions with confidence.

▶ **Strengthen governance frameworks:** Implement strong data governance practices to maintain data compliance and sovereignty, addressing privacy and regulatory concerns upfront. Governance provides the structure needed to scale AI responsibly and efficiently.

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

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

Survey Insights

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

Two of the **top 3 AI investment areas** in the next 12 months are data-related:

#1: Data science & business intelligence

#3: Data management & governance

34% of APJ respondents highlighted that they will be **developing data management** capabilities in the next 12 months.

The **#1 skill** APJ organizations are currently developing to support AI projects is **data management** and **governance**.
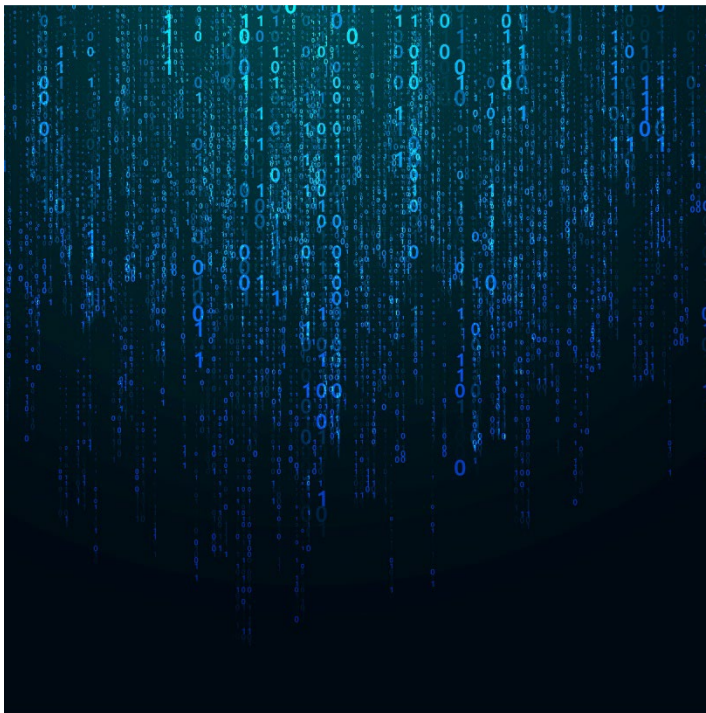
▶ **Data infrastructure underpins AI success:** Adequate data storage, high-performance compute resources, low-latency networks, and integrated MLOps platforms are critical for supporting AI workloads and ensuring seamless operations.

▶ **Focus on foundational investments:** IDC reports 34% of APJ organizations plan to develop data management capabilities in the next 12 months, with data science and governance ranked as two of the top three AI investment areas. High-quality, well-managed data is essential for accurate, reliable AI outcomes.

▶ **Lessons from GenAI adoption:** Many APJ organizations experienced inefficiencies and limited success due to poor data quality during the rapid deployment of GenAI use cases in the past 18 months. This highlights the need for robust data practices and investment in data management platforms.

▶ **Addressing data challenges:** Data quality issues remain the top barrier to AI success. Fresh talent and upskilling programs focused on data management are crucial for overcoming these challenges and maximizing AI investments.

Considerations for CIOs

CIOs must ensure that organizational data is accurate, consistent, well-structured, and readily accessible, creating a strong foundation for AI initiatives and enabling actionable insights. This requires investments in advanced data platforms and robust governance frameworks to enhance data quality, security, and compliance.

To maximize the value of AI, organizations should also prioritize upskilling teams in data analytics, empowering them to make data-driven decisions and foster innovation.

Leveraging external partnerships with AI experts can complement internal capabilities and help navigate complexities.

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AI Governance & Compilance
AI GRC is the Cornerstone for Building Trusted AI

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

- **15%** ▶ No plans to establish AI GRC policies
- **38%** ▶ Currently developing AI GRC policies
- **23%** ▶ Have enterprise AI GRC policies, but enforcement is limited
- **25%** ▶ Have enterprise AI GRC policies that are fully enforced
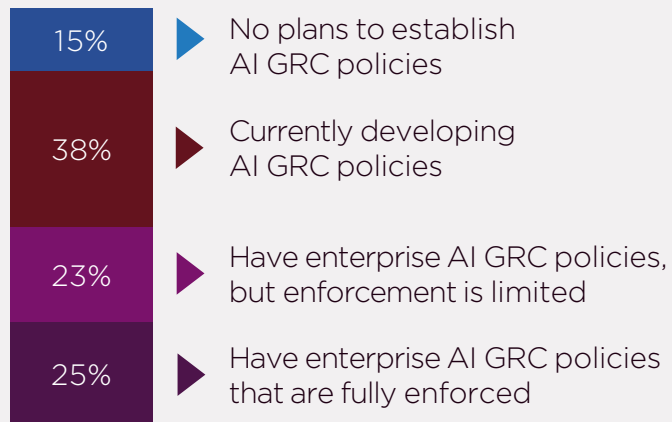
Most Important Aspects of AI-related GRC

1		**Ethical AI** frameworks
2		Greater AI **accountability** & **reliability**
3		Improved **model governance** & **policy control**
4		Enhanced AI **privacy** & **security**
5		Integrated **human oversight**

Considerations for CIOs

CIOs must implement AI governance focusing on ethics, accountability, privacy, and oversight.

Governance should ensure transparency, security, and regulatory compliance. They must define clear policies to mitigate risks, ensure compliance, and build trust across stakeholders. Robust oversight mechanisms should be established to maintain ethical AI operations, addressing issues such as bias and model drift, and ensuring alignment with organizational goals.

- ▶ **The risks of neglecting governance:** Without robust GRC, AI initiatives risk falling short of expectations, eroding trust, and creating barriers to adoption. Organizations must prioritize governance as a foundational component of AI strategy to maximize its value and ensure long-term success.

- ▶ **Building trust in AI systems:** AI GRC is essential to ensuring transparency, security, and compliance, fostering trust among users, employees, and partners. However, only 25% of APJ organizations have fully enforced GRC policies, highlighting the urgent need for a structured approach.

- ▶ **Essential elements for trustworthy AI:** Effective AI governance requires explainability, ethical frameworks, accountability, model governance, enhanced privacy and security, and integrated human oversight. These measures address bias, fairness, and compliance with AI and data protection regulations, forming the backbone of sustainable AI adoption.

- ▶ **Embedding GRC into enterprise frameworks:** AI cannot police itself—GRC must be embedded into larger enterprise governance strategies. This ensures that AI systems remain reliable, fair, and ethically aligned, mitigating risks and protecting sensitive data while enabling businesses to scale AI responsibly.

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AI Services
Evolving AI Strategies: The Crucial Role of Professional Services

Current Usage of **AI Professional Services**

- Actively using 34%
- Exploring 20%
- Planning 46%
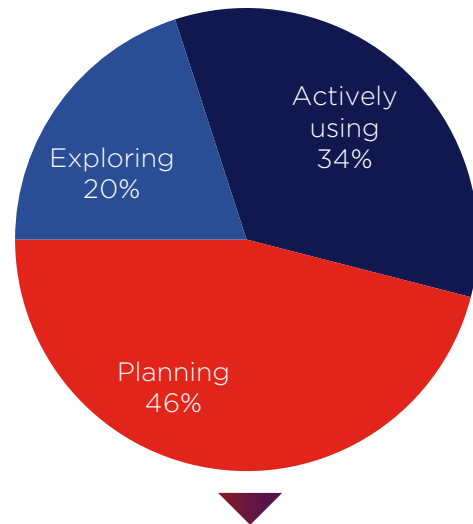
What Are Organizations **Seeking Help** With?

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

▶ **Delivering end-to-end solutions:** Partners provide strategic guidance, model development, and operational support to streamline AI implementation and define measurable business outcomes.

▶ **Providing technical expertise:** Service providers bring critical skills in areas like data management, GenAI, NLP, automation, and data security to help enterprises integrate AI tools seamlessly into existing systems.

▶ **Addressing data complexity:** With expertise in managing and optimizing enterprise data, professional services ensure compliance with regional and global regulations, a key priority for AI scalability.

▶ **Accelerating AI initiatives:** By partnering with external experts, enterprises can de-risk investments, overcome internal skill shortages, and fast-track scalable AI adoption.

▶ **Ensuring scalability and compliance:** Professional services drive long-term AI success by embedding human oversight, fostering ethical practices, and addressing regulatory concerns.

▶ **Bridging capability gaps:** Service providers play a crucial role in helping organizations develop strategies and roadmaps that align with Lenovo's focus on delivering impactful AI solutions.

Considerations for CIOs

CIOs increasingly acknowledge the importance of strategic partnerships with external providers to fast-track AI deployment. They must prioritize service providers offering scalable hybrid infrastructure, advanced data management capabilities, and robust governance frameworks to support sustainable AI growth.

To maximize value, CIOs should define clear SLAs and KPIs focusing on ROI and project timelines, while ensuring effective knowledge transfer to build internal expertise and reduce long-term reliance on external partners.

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AI Infrastructure

The Hybrid Imperative: AI-Ready On-Prem Infrastructure and Private Cloud Needed

Primary **Infrastructure Approach** to AI Workloads
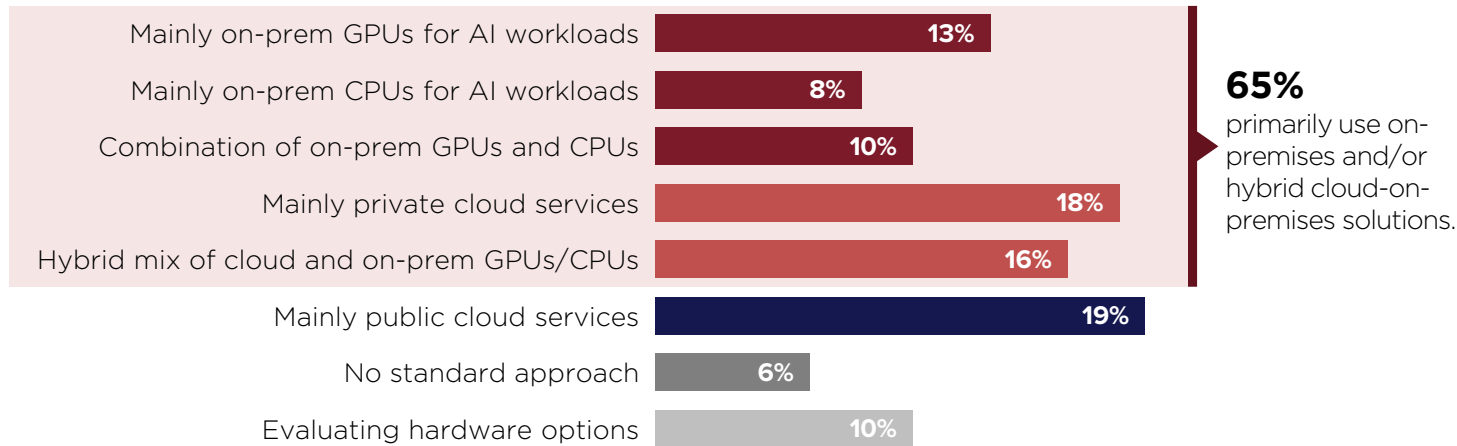
- Mainly on-prem GPUs for AI workloads — **13%**
- Mainly on-prem CPUs for AI workloads — **8%**
- Combination of on-prem GPUs and CPUs — **10%**
- Mainly private cloud services — **18%**
- Hybrid mix of cloud and on-prem GPUs/CPUs — **16%**
- Mainly public cloud services — **19%**
- No standard approach — **6%**
- Evaluating hardware options — **10%**

65% primarily use on-premises and/or hybrid cloud-on-premises solutions.

Considerations for CIOs

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

► **AI's demanding computational requirements driving an extensive platform shift:** AI workloads, especially GenAI, require specialized hardware like GPUs and high-performance infrastructure to process large-scale data and execute complex algorithms critical for innovation.

► **The rise of hybrid cloud solutions:** IDC research shows two-thirds of organizations rely on hybrid and on-prem solutions for AI workloads, combining on-prem infrastructure with private cloud resources for flexibility, resource management, and monitoring.

► **On-premises for sensitive workloads:** Nearly one-third of organizations prioritize on-prem solutions to maintain control over sensitive data, meet stringent security and compliance requirements, and reduce latency, especially in industries like manufacturing.

► **Flexibility through hybrid adoption:** 16% of organizations use a hybrid approach, enabling workloads to shift between environments based on performance, cost, or security needs, ensuring scalability for AI while retaining data control.

► **Use case alignment drives decisions:** Manufacturing firms, for instance, utilize on-prem systems for IoT data collection and private clouds to analyze AI-driven insights, maximizing efficiency while meeting regulatory needs. The private cloud supports scalability for AI model training, while the on-premises systems maintain control over sensitive operational data.

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

Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | Insights by Industries & Markets | Research Methodology | Why Lenovo

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

AI Devices

AI-Powered PCs Are Set to Enable the Intelligent Digital Workplaces of Tomorrow

Survey Insights

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

AI-Powered PCs Adoption

1%   62%   27%   10%

- Not Considering
- Piloting
- Planning/ Considering
- Extensively Used
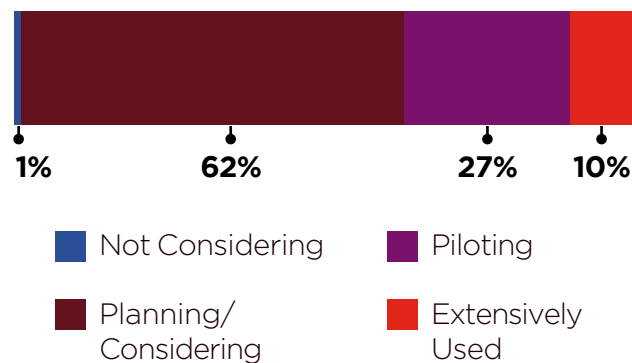
▶ **Enhancing productivity at the edge:** APJ organizations are prioritizing intelligent digital workplaces, with AI PCs becoming essential tools for improving employee experiences and productivity by enabling access to AI capabilities on the edge.

▶ **Optimized for AI workloads:** AI PCs offload tasks to NPUs, reducing the strain on CPUs and GPUs. This architecture supports real-time inference, model training, and parallel processing, making them ideal for tasks like image recognition, natural language processing, and sensor data analysis.

▶ **Personalization and automation:** These devices enhance worker productivity through personalized experiences, task automation, and improved collaboration, while also future-proofing organizations for Agentic AI to drive greater efficiency and innovation.

▶ **Adoption trajectory and overcoming delays:** Although AI PC adoption is in its early stages, most organizations are planning or considering their integration into IT infrastructure. Strict device refresh cycles may slow adoption, but as the technology matures and demonstrates clear benefits, the adoption curve will accelerate, driving more implementation across industries.

Considerations for CIOs

Adopt hybrid architectures that allow seamless movement of workloads between environments and deliver on cost optimization and security. Prioritize on-premises solutions for sensitive AI workloads or those with strict latency and compliance requirements, where the scalability of the cloud is less needed.
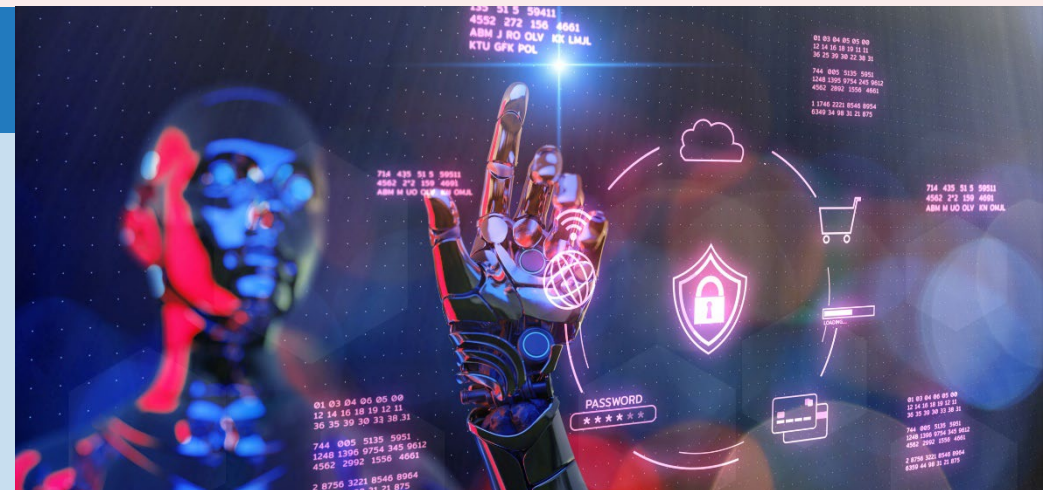
Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Asia/Pacific n=900

Insights by
Industries

Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | **Insights by Industries & Markets** | Research Methodology | **Why Lenovo**

BFSI | Retail | Manufacturing | Telco/CSP | Healthcare | Government

BFSI – AI Journey Overview

AI adoption in the Banking, financial services, and insurance (BFSI) sector in APJ is primarily driven by the need to streamline operational efficiencies, enhance customer satisfaction through hyper-personalized services, and meet evolving regulatory mandates. The emphasis on leveraging advanced AI technologies, including generative AI, aligns with goals such as improving fraud detection, risk management, and credit decisioning processes. To succeed, financial institutions must address critical challenges like data integrity, latency issues, and integration complexities while fostering strategic partnerships and developing in-house AI capabilities to remain agile and competitive.

Business Priorities for 2025

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

Current AI Adoption
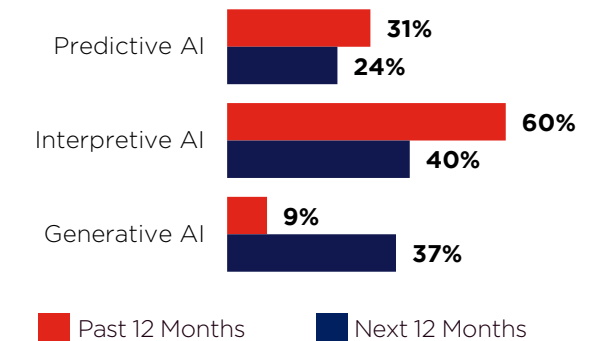
Adoption
- AI is **systematically adopted** across the enterprise — 11%
- Supporting different **pilot** projects/use cases — 25%
- **Early stages** of development/implementation — 7%

Non-Adopters
- **Planning** to start using AI in the next 12 months — 41%
- **Considering** or **evaluating** AI, but with no plans yet — 16%

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	31%	24%
Interpretive AI	60%	40%
Generative AI	9%	37%

■ Past 12 Months   ■ Next 12 Months

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

Growth in AI as a % of IT Spend

3.1x

2024 → 2025
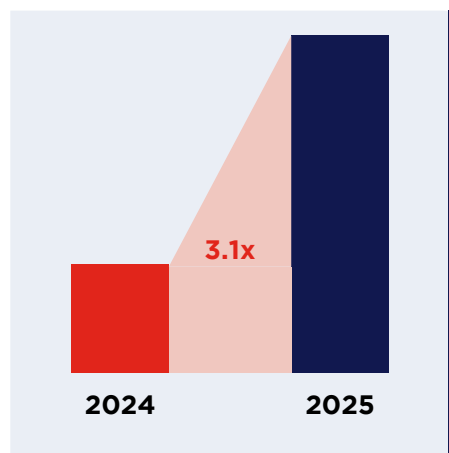
Business Functions Adopting AI Use Cases

1. Customer service
2. Software Development
3. IT Ops
4. Marketing
5. R&D

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Data quality issues
2. Application latency/ performance issues
3. Challenges deploying AI solutions at endpoints
4. Unrealistic expectations from senior management
5. 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. Adequate budget & management commitment
4. Availability of internal AI expertise
5. Employee training & upskilling

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, BFSI n=134

| Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | Insights by Industries & Markets | Research Methodology | Why Lenovo |

BFSI | Retail | Manufacturing | Telco/CSP | Healthcare | Government

BFSI – AI Foundations Overview

BFSI organizations are building AI foundations to enable robust data-driven decision-making and improve business processes, with a strong emphasis on ensuring data quality and secure integration with legacy systems. Financial institutions are increasingly leveraging hybrid infrastructure to balance compliance, data sovereignty, and operational flexibility, while seeking partnerships to address gaps in AI expertise and scalable solutions. As AI-powered tools, including advanced analytics and customer-facing applications, become critical to enhancing operational resilience and customer engagement, addressing latency and scaling challenges will define success. Regionally, markets like Singapore and Australia are advancing rapidly with AI adoption in fraud detection and credit scoring, while emerging markets like India focus on cost-efficient AI applications that can enhance financial inclusivity efforts through cost and manpower reduction.

Survey Insights

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

Overall Infrastructure Deployment – Next 12 Months

- Public Cloud — 31%
- Edge / Branch / Small Campus Locations — 20%
- On-premises Private Cloud — 26%
- Traditional on-premise data center / traditional hosted data center — 24%

Primary Infrastructure Approach to AI Workloads

- 17% — Public Cloud
- 66% — On-Premises / Private / Hybrid
- 10% — No standard approach
- 7% — Evaluating
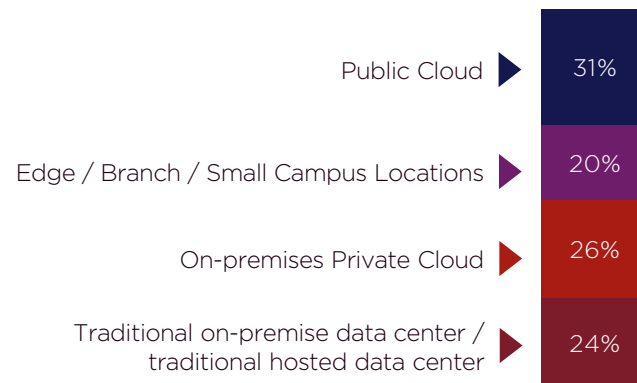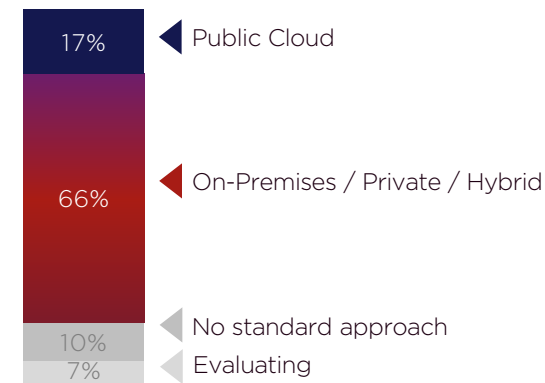
What Do Organizations Seek in a Partner?

1	Support for data management
2	AI knowledge & expertise (including scaling AI solutions)
3	Ability to help our organization deliver measurable business outcomes
4	Depth of partnerships with AI solution providers (ISVs, alliance partners)

Next Gen Devices - AI-Powered PCs Adoption

- 10% — Extensively used
- 25% — Piloting
- 65% — Planning / considering

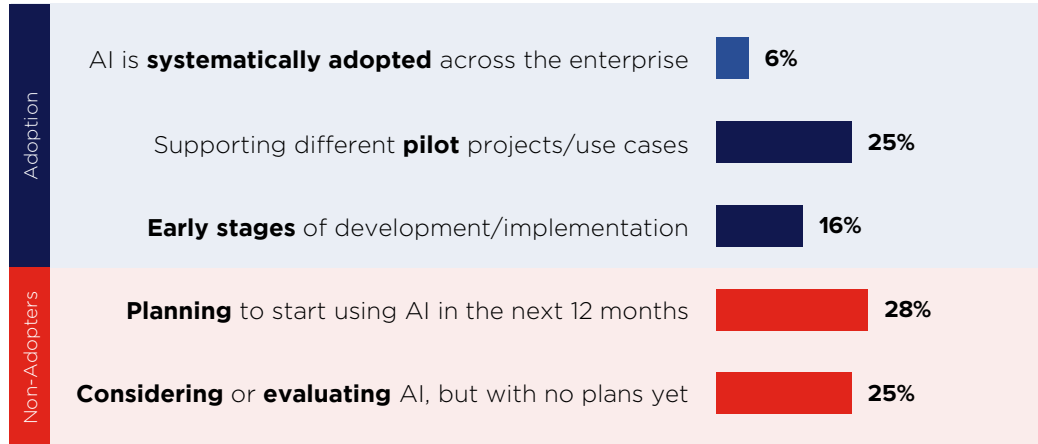Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, BFSI n=134

Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | **Insights by Industries & Markets** | Research Methodology | **Why Lenovo**

BFSI | Retail | Manufacturing | Telco/CSP | Healthcare | Government
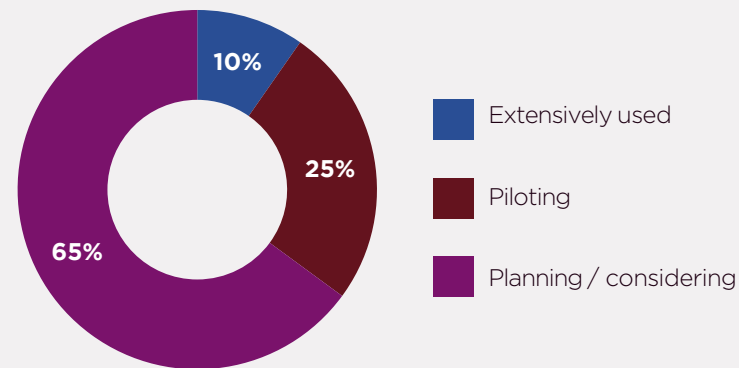
Retail – AI Journey Overview

In the retail industry, AI adoption in APJ is driven by the need to optimize supply chains, deliver hyper-personalized customer experiences, and drive digital business innovation to remain competitive in a dynamic market. Retailers are increasingly focusing on generative AI to enhance decision-making and improve operational efficiency across marketing, sales, and customer service functions. However, success hinges on overcoming integration challenges, ensuring data quality, and fostering partnerships with AI providers to enable scalable and seamless implementation within existing systems. Greater maturity in digital platforms, scalable cloud infrastructures, and AI expertise has allowed developed countries in Asia to adopt generative AI more rapidly, whereas certain ASEAN markets face larger integration challenges with legacy systems and struggles with data quality.

Business Priorities for 2025

1. Optimizing supply chain/inventory
2. Applying emerging AI technologies (e.g., generative AI)
3. Driving digital business innovation
4. Improving regulatory compliance
5. Enhancing decision making
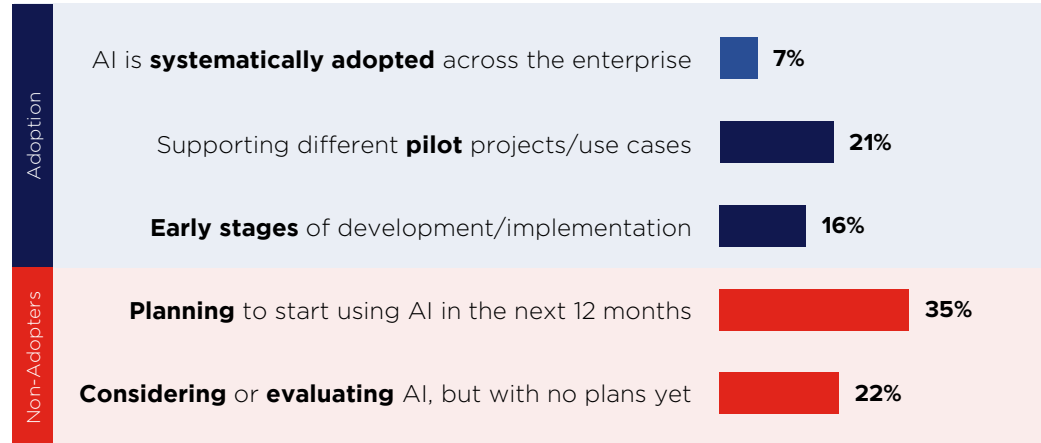
Current AI Adoption

Adoption
- AI is **systematically adopted** across the enterprise — 7%
- Supporting different **pilot** projects/use cases — 21%
- **Early stages** of development/implementation — 16%

Non-Adopters
- **Planning** to start using AI in the next 12 months — 35%
- **Considering** or **evaluating** AI, but with no plans yet — 22%

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	10%	19%
Interpretive AI	70%	38%
Generative AI	20%	43%

■ Past 12 Months ■ Next 12 Months

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

Growth in AI as a % of IT Spend

3.0x
2024 → 2025
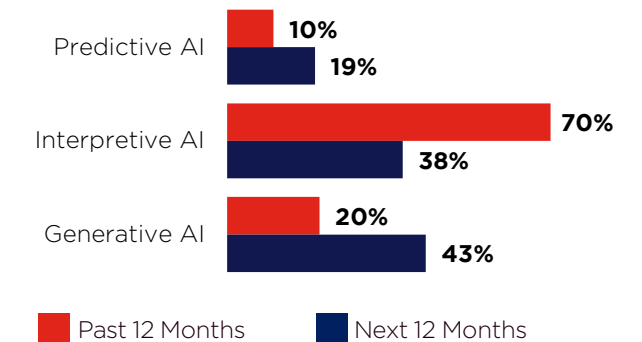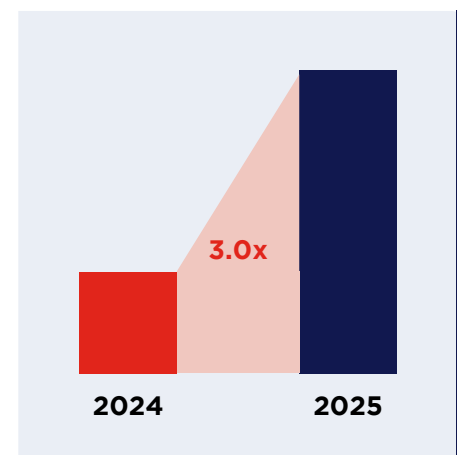
Business Functions Adopting AI Use Cases

1. Sales
2. Marketing
3. Customer service
4. Supply Chain
5. Facilities

Inhibitors That Resulted in AI Projects Not Meeting Expectations

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

Top Factors for Successful AI Implementation Moving Forward

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Retail n=116

BFSI | Retail | Manufacturing | Telco/CSP | Healthcare | Government

Retail – **AI Foundations** Overview

Retail organizations in APJ are increasingly prioritizing AI foundations to drive real-time personalization, optimize inventory management, and enhance customer engagement across omnichannel platforms. With a strong focus on hybrid infrastructure, retailers aim to balance scalability with compliance and data sovereignty, while partnerships with AI solution providers are critical to addressing expertise gaps and achieving measurable outcomes. The integration of AI-powered devices for in-store analytics and supply chain visibility underscores the industry's shift toward operational agility and precision. Regionally, markets like Australia and Singapore are leveraging AI for advanced predictive analytics in customer behavior, whereas emerging markets such as Indonesia focus more on cost-effective AI solutions to digitize traditional retail ecosystems.
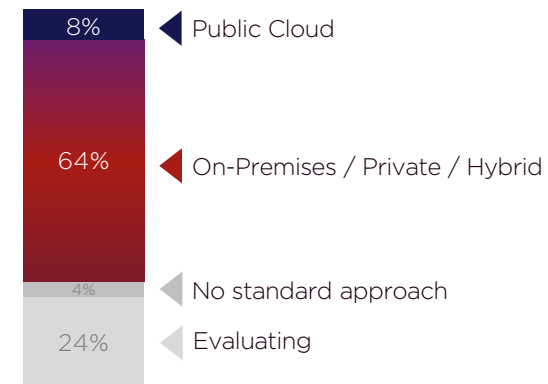
Survey Insights

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

Overall **Infrastructure** Deployment – Next 12 Months

Category	%
Public Cloud	33%
Edge / Branch / Small Campus Locations	17%
On-premises Private Cloud	26%
Traditional on-premise data center / traditional hosted data center	24%

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

Category	%
Public Cloud	29%
On-Premises / Private / Hybrid	57%
No standard approach	10%
Evaluating	5%

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

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

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

- 8% Extensively used
- 17% Piloting
- 74% Planning / Considering
- 1% Not Considering

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Retail n=116

Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | **Insights by Industries & Markets** | Research Methodology | **Why Lenovo**

BFSI | Retail | Manufacturing | Telco/CSP | Healthcare | Government
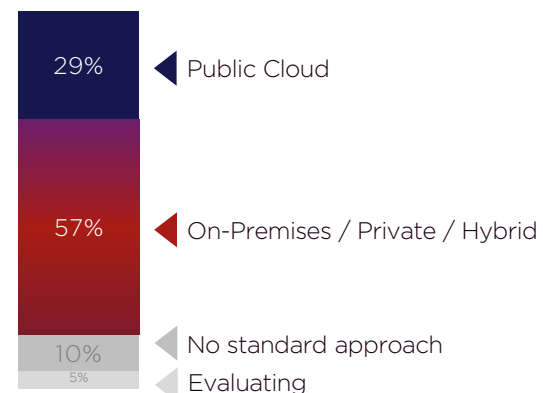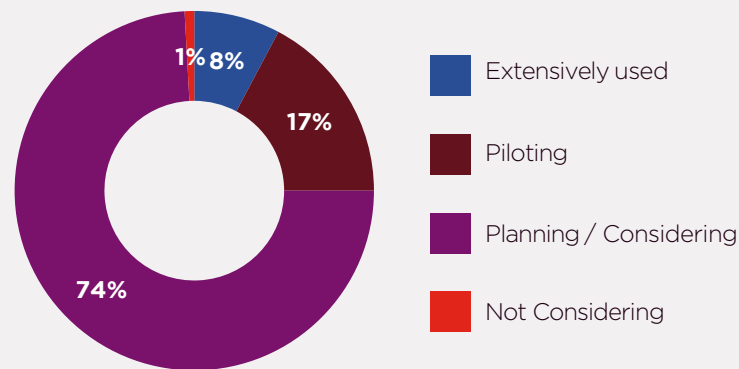
Manufacturing – AI Journey Overview

AI adoption in the manufacturing sector across APJ is driven by the need to enhance operational efficiencies, optimize supply chains, and improve predictive maintenance capabilities to reduce downtime and improve asset utilization. Manufacturers are increasingly leveraging generative AI and interpretive AI to streamline engineering and R&D processes, accelerate time-to-market, and enable real-time decision-making on production lines. However, addressing challenges such as scaling AI across production facilities, mitigating application latency, and ensuring cost-effective access to AI-powered edge devices is critical for realizing the full potential of Industry 4.0 transformation in this sector.

Business Priorities for 2025

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

Current AI Adoption

Adoption

- AI is **systematically adopted** across the enterprise — 6%
- Supporting different **pilot** projects/use cases — 25%
- **Early stages** of development/implementation — 16%

Non-Adopters

- **Planning** to start using AI in the next 12 months — 28%
- **Considering** or **evaluating** AI, but with no plans yet — 25%

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	23%	22%
Interpretive AI	64%	44%
Generative AI	13%	34%

Past 12 Months | Next 12 Months

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

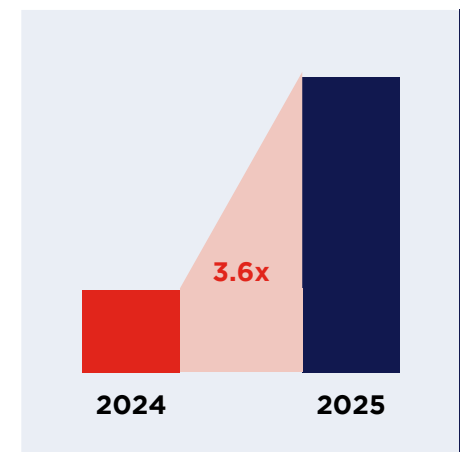## Growth in AI as a % of IT Spend

2.9x

2024 → 2025
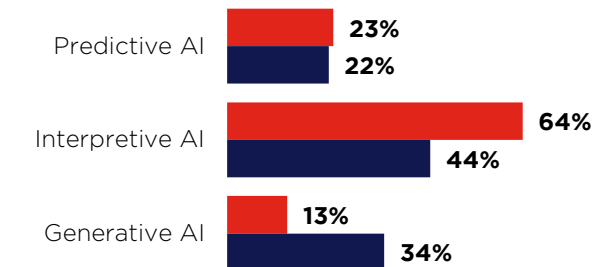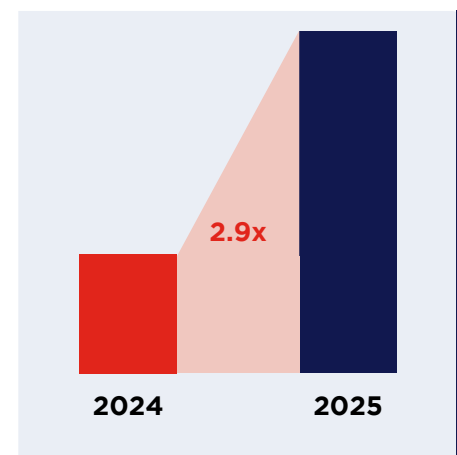
Business Functions Adopting AI Use Cases

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

Inhibitors That Resulted in AI Projects Not Meeting Expectations

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

Top Factors for Successful AI Implementation Moving Forward

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

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

| Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | Insights by **Industries** & Markets | Research Methodology | Why Lenovo |

BFSI | Retail | Manufacturing | Telco/CSP | Healthcare | Government

Manufacturing – AI Foundations Overview

Building AI foundations in the manufacturing sector within APJ requires a tailored approach, balancing robust on-premises solutions with hybrid deployments to address operational complexities like real-time quality control and supply chain optimization. With a heightened focus on governance, risk, and compliance and ensuring data security, manufacturers are leveraging partnerships with ISVs and AI solution providers to develop scalable AI-driven workflows. The demand for as-a-service pricing models and edge infrastructure highlights the sector's shift towards flexible, cost-efficient AI implementations that enhance predictive maintenance and operational agility. Regionally, countries like Japan and South Korea lead in adopting advanced AI for robotics and automation, while ASEAN nations prioritize cost-sensitive solutions for process efficiency and workforce augmentation.

Survey Insights

37% of organizations highlighted that they will be developing **data management capabilities** in the next 12 months.

Overall Infrastructure Deployment – Next 12 Months

Public Cloud	35%
Edge / Branch / Small Campus Locations	17%
On-premises Private Cloud	25%
Traditional on-premise data center / traditional hosted data center	23%

Primary Infrastructure Approach to AI Workloads

8%	Public Cloud
64%	On-Premises / Private / Hybrid
4%	No standard approach
24%	Evaluating
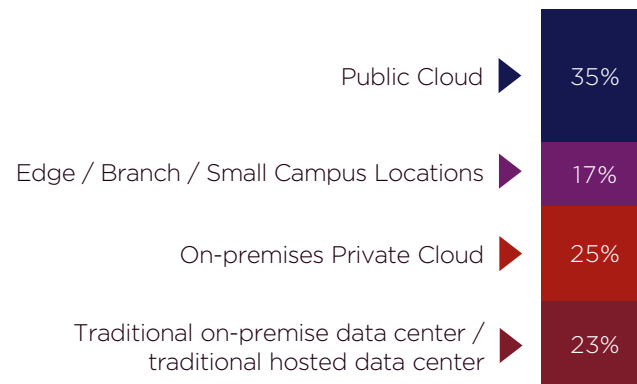
What Do Organizations Seek in a Partner?

1	Provision of as-a-service (i.e., SaaS / IaaS / PaaS) pricing & offerings
2	Support for data security & privacy
3	Depth of partnerships with AI solution providers (ISVs, alliance partners)
4	Support for GRC

Next Gen Devices - AI-Powered PCs Adoption

- 9% Extensively used
- 27% Piloting
- 63% Planning / Considering
- 1% Not Considering

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

Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | **Insights by Industries & Markets** | Research Methodology | **Why Lenovo**

BFSI | Retail | Manufacturing | Telco/CSP | Healthcare | Government
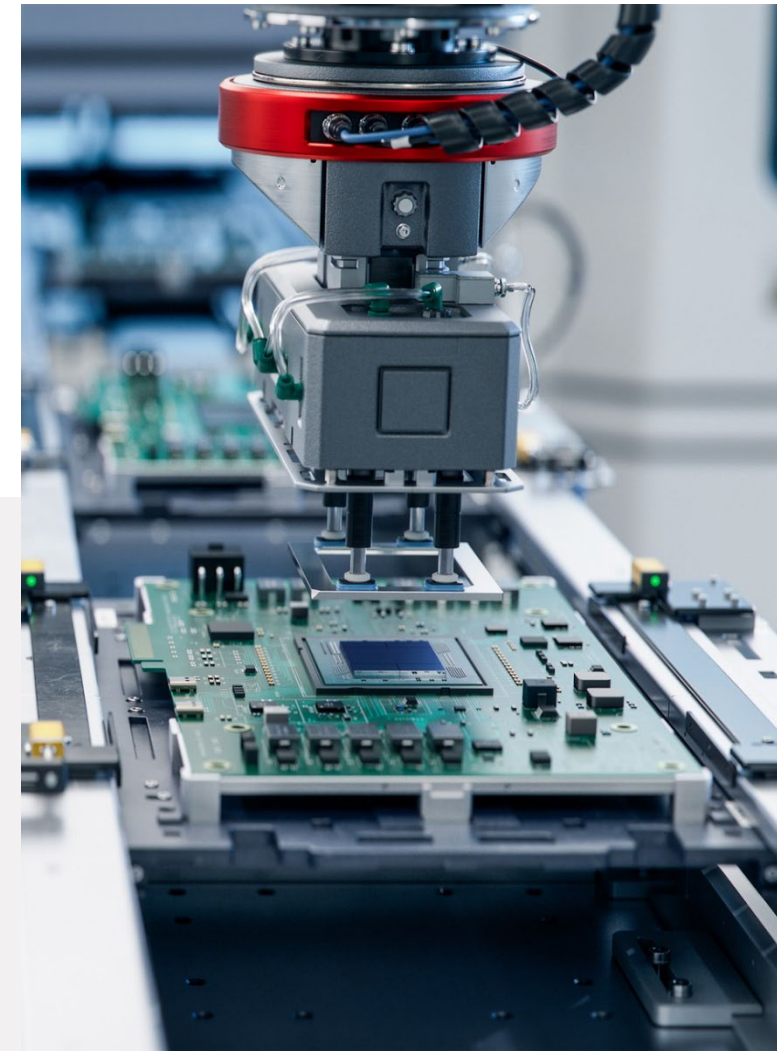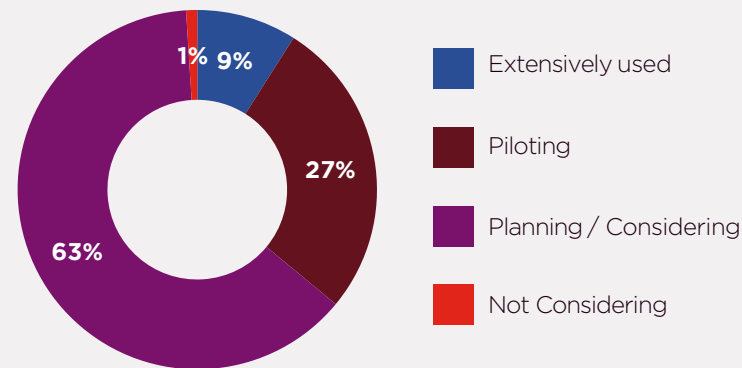
Telecommunications / Cloud Service Providers – AI Journey Overview

AI adoption in the telecommunications industry across APJ is centered on improving network optimization, predictive maintenance, and enhancing customer experience through real-time data insights and automation. Interpretive AI is being used for anomaly detection and dynamic capacity management. In the coming 12 months, telcos will increasingly leverage generative AI to enhance OSS/BSS processes, such as automating customer support through advanced chatbots, optimizing call routing efficiency, and streamlining supply chain operations within their NSS frameworks. However, challenges such as scaling AI across decentralized operations, ensuring data sovereignty, and mitigating network latency underscore the need for robust governance frameworks and infrastructure investments. Regionally, developed markets like Japan and South Korea are leading in network automation and AI-driven 5G deployment, whereas ASEAN countries face hurdles in scaling AI due to fragmented infrastructure and talent shortages.

Business Priorities for 2025

1. Improving sustainability
2. Reducing business risk & cyber threats
3. Increasing business agility & responsiveness
4. Optimizing supply chain/inventory
5. Improving customer experience & satisfaction

Current AI Adoption

Adoption
- AI is **systematically adopted** across the enterprise — 11%
- Supporting different **pilot** projects/use cases — 20%
- **Early stages** of development/implementation — 10%

Non-Adopters
- **Planning** to start using AI in the next 12 months — 40%
- **Considering** or **evaluating** AI, but with no plans yet — 19%

AI Implementations by Category: Past and Future

- Predictive AI — 16% (Past 12 Months), 24% (Next 12 Months)
- Interpretive AI — 74% (Past 12 Months), 36% (Next 12 Months)
- Generative AI — 11% (Past 12 Months), 40% (Next 12 Months)

Past 12 Months | Next 12 Months

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

Growth in AI as a % of IT Spend

3.6x

2024 → 2025

Business Functions Adopting AI Use Cases

1. IT Ops
2. Legal
3. Supply Chain
4. Engineering/R&D
5. Marketing

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Data quality issues
2. Lack of budget or management buy-in
3. Challenges deploying AI solutions at endpoints
4. IT infrastructure/network costs
5. Challenges scaling AI across the enterprise (including lack of departmental support)

Top Factors for Successful AI Implementation Moving Forward

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Telco / CSP n=139

Telecommunications / Cloud Service Providers – AI Foundations Overview

AI adoption in the telecommunications sector in APJ reflects an evolving need to manage dynamic workloads and ensure network reliability, particularly in the face of increasing demands for 5G deployment and edge computing. Organizations are prioritizing robust infrastructure approaches, leveraging hybrid and on-premises models to maintain operational resilience while integrating AI for predictive network management, anomaly detection, and customer experience enhancement through advanced OSS/BSS solutions. The industry's emphasis on AI expertise and scalable modeling capabilities is driven by the imperative to deliver measurable business outcomes while addressing challenges like data quality and latency. Regional differences highlight that markets like Japan and South Korea focus on leveraging AI for automation in network orchestration and service delivery, whereas emerging ASEAN economies prioritize cost-efficient solutions for customer retention and network optimization.

Survey Insights

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

Overall Infrastructure Deployment – Next 12 Months

- Public Cloud — 35%
- Edge / Branch / Small Campus Locations — 18%
- On-premises Private Cloud — 24%
- Traditional on-premise data center / traditional hosted data center — 23%

Primary Infrastructure Approach to AI Workloads

- Public Cloud — 25%
- On-Premises / Private / Hybrid — 67%
- No standard approach — 4%
- Evaluating — 4%
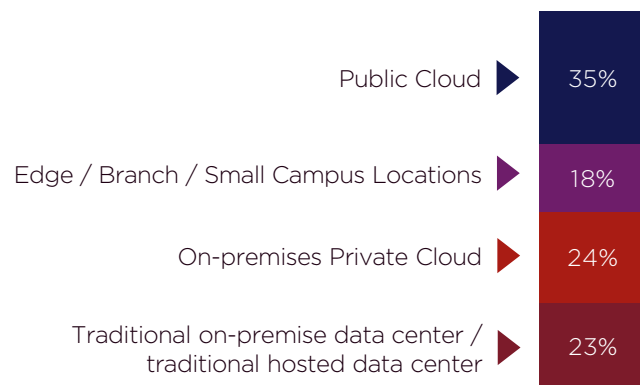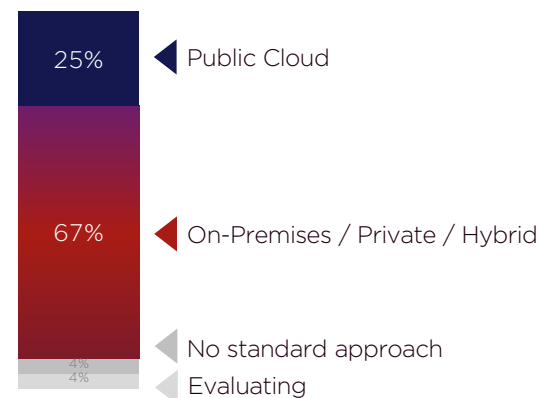
What Do Organizations Seek in a Partner?

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

Next Gen Devices - AI-Powered PCs Adoption
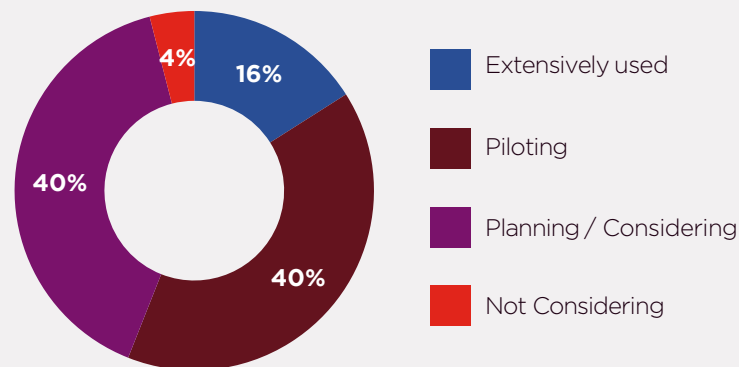
- Extensively used — 16%
- Piloting — 40%
- Planning / Considering — 40%
- Not Considering — 4%

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Telco / CSP n=139

| Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | Insights by Industries & Markets | Research Methodology | Why Lenovo |

BFSI | Retail | Manufacturing | Telco/CSP | Healthcare | Government

Healthcare – AI Journey Overview

AI adoption in the healthcare industry in APJ is driven by the need to enhance decision-making in diagnostics, streamline operational efficiency, and address supply chain complexities for medical equipment and pharmaceuticals. The focus on regulatory compliance and data sovereignty reflects the industry's sensitivity to patient privacy and regional health governance standards. Predictive AI is being utilized to improve diagnostic accuracy, optimize treatment plans, and forecast patient outcomes. Overcoming integration challenges with legacy systems and upskilling healthcare professionals will be critical for scaling AI solutions that deliver real-world outcomes. Regionally, developed markets like Singapore and Australia lead in leveraging AI for precision medicine and hospital automation, while emerging markets such as India focus on AI-driven solutions for early disease detection and scaling telemedicine platforms to address rural healthcare challenges.

Business Priorities for 2025

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

Current AI Adoption
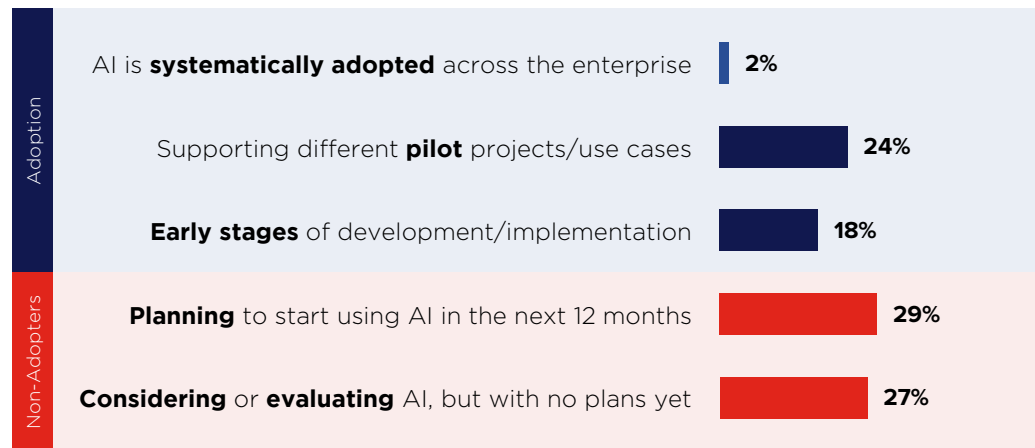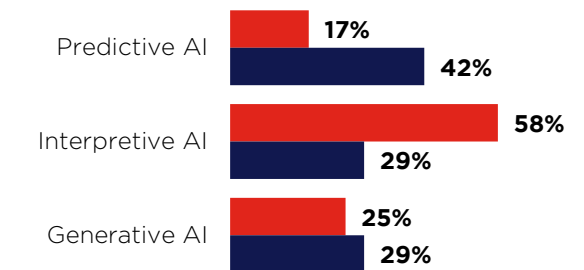
Adoption

- AI is **systematically adopted** across the enterprise — **2%**
- Supporting different **pilot** projects/use cases — **24%**
- **Early stages** of development/implementation — **18%**

Non-Adopters

- **Planning** to start using AI in the next 12 months — **29%**
- **Considering** or **evaluating** AI, but with no plans yet — **27%**

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	17%	42%
Interpretive AI	58%	29%
Generative AI	25%	29%

■ Past 12 Months   ■ Next 12 Months

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

Growth in AI as a % of IT Spend

5.3x

2024 → 2025
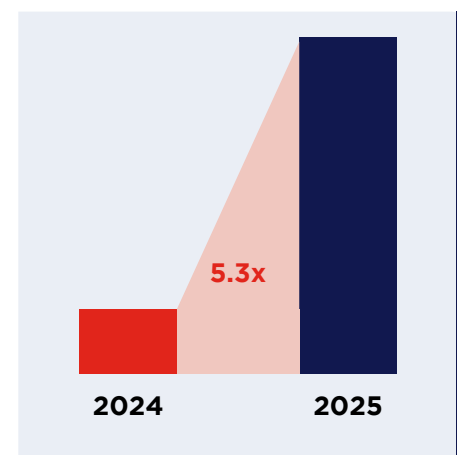
Business Functions Adopting AI Use Cases

1	IT Ops
2	R&D
3	Finance
4	Software Development
5	Facilities

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1	Unavailability or cost of AI expertise
2	Lack of budget or management buy-in
3	Unrealistic expectations from senior management
4	Application latency/performance issues
5	Problems integrating AI with existing systems & processes

Top Factors for Successful AI Implementation Moving Forward

1	Ensuring data sovereignty & compliance
2	Employee training & upskilling
3	Availability of AI-powered PCs & edge devices
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, Healthcare n=55

| Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | **Insights by Industries & Markets** | Research Methodology | **Why Lenovo** |

BFSI | Retail | Manufacturing | Telco/CSP | Healthcare | Government
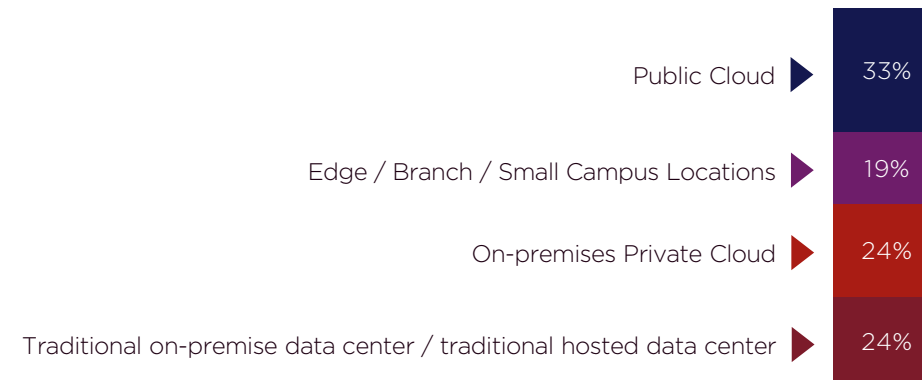
Healthcare – AI Foundations Overview

In healthcare across APJ, AI foundations are being developed to enable advanced diagnostics, streamline clinical workflows, and support precision medicine initiatives, with a strong emphasis on data governance and interoperability. Organizations are prioritizing investments in data science and business intelligence capabilities to handle the complexity of patient data while ensuring compliance with stringent regulatory and privacy standards. Collaborations with AI solution providers are essential to address gaps in expertise and scalability, particularly for deploying AI in areas like predictive analytics and telemedicine. Regionally, countries like Singapore and Australia lead in leveraging AI for personalized healthcare and hospital automation, while markets like Indonesia focus on scaling AI for affordable telehealth solutions to improve access in underserved areas.

Survey Insights

Data science and **business intelligence**, along with **data management** and **governance**, are currently the **top two skills being developed** by organizations to support AI projects.

Overall Infrastructure Deployment – Next 12 Months

Public Cloud	33%
Edge / Branch / Small Campus Locations	19%
On-premises Private Cloud	24%
Traditional on-premise data center / traditional hosted data center	24%

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

1		Depth of partnerships with AI solution providers (ISVs, alliance partners)
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
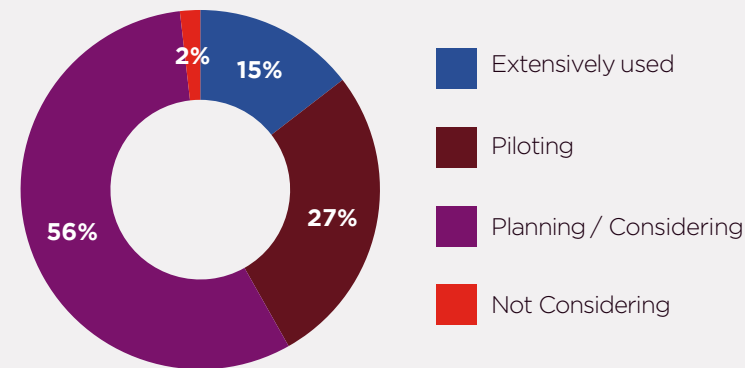
- 15% — Extensively used
- 27% — Piloting
- 56% — Planning / Considering
- 2% — Not Considering

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

| Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | Insights by Industries & Markets | Research Methodology | Why Lenovo |

BFSI | Retail | Manufacturing | Telco/CSP | Healthcare | Government

Government – AI Journey Overview

AI adoption in the APJ government sector focuses on regulatory compliance, cybersecurity, and sustainability. Interpretive AI aids in fraud prevention, predictive analytics, and resource optimization, while generative AI enhances citizen services and automates administrative tasks. Key challenges include integrating AI with legacy systems, ensuring data sovereignty, and scaling adoption, which require strong governance and cross-agency collaboration. Regionally, countries such as Singapore, Australia, and South Korea lead in smart city and digital governance initiatives, while emerging markets prioritize cost-effective AI solutions for public service delivery.

Business Priorities for 2025

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

Current AI Adoption

Adoption
- AI is **systematically adopted** across the enterprise — 8%
- Supporting different **pilot** projects/use cases — 34%
- **Early stages** of development/implementation — 8%

Non-Adopters
- **Planning** to start using AI in the next 12 months — 44%
- **Considering** or **evaluating** AI, but with no plans yet — 6%

AI Implementations by Category:

- Predictive AI — 28%
- Interpretive AI — 30%
- Generative AI — 42%

■ Next 12 Months

Growth in AI as a % of IT Spend

2024 → 2025: **3.5x**
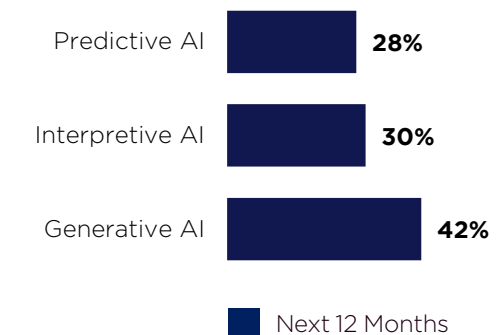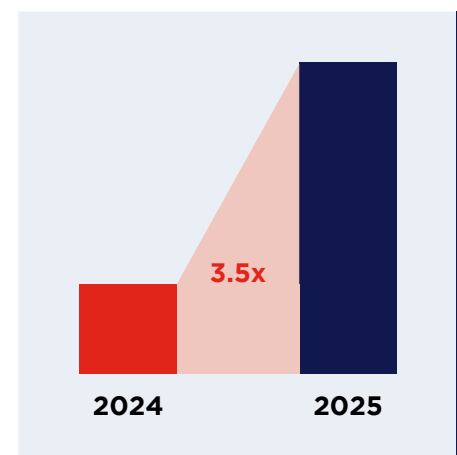
Business Functions Adopting AI Use Cases

1. IT Ops
2. Sales
3. Finance
4. Cybersecurity
5. Human resources

Inhibitors That Resulted in AI Projects Not Meeting Expectations

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

Top Factors for Successful AI Implementation Moving Forward

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

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

Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | **Insights by Industries & Markets** | Research Methodology | **Why Lenovo**

BFSI | Retail | Manufacturing | Telco/CSP | Healthcare | **Government**

Government – AI Foundations Overview

The government sector is increasingly focused on establishing AI foundations that emphasize data sovereignty and data management, secure integration with legacy systems, and scalable deployments to support large-scale public initiatives. Investments in on-premises and hybrid cloud infrastructures are driven by the need to handle sensitive data while ensuring compliance with local regulations, particularly in areas such as cybersecurity and citizen services. Collaboration with AI vendors and solution providers is crucial to address knowledge gaps and develop AI capabilities tailored to the complexity of public sector operations. Regionally, countries like South Korea excel in leveraging AI for smart city projects and real-time public safety systems, while emerging economies like Malaysia, India, and the Philippines focus on AI-driven cost efficiency and citizen engagement solutions.

Survey Insights

44% of organizations highlighted that they will be developing **data management capabilities** in the next 12 months.

Overall Infrastructure Deployment – Next 12 Months

Public Cloud ▶	28%
Edge / Branch / Small Campus Locations ▶	24%
On-premises Private Cloud ▶	25%
Traditional on-premise data center / traditional hosted data center ▶	23%

What Do Organizations Seek in a Partner?

1. Support for data management
2. Ability to help our organization deliver measurable business outcomes
3. Support for data security & privacy
4. Support for AI modeling & development

Next Gen Devices - AI-Powered PCs Adoption

- 10% Extensively used
- 36% Piloting
- 54% Planning / Considering
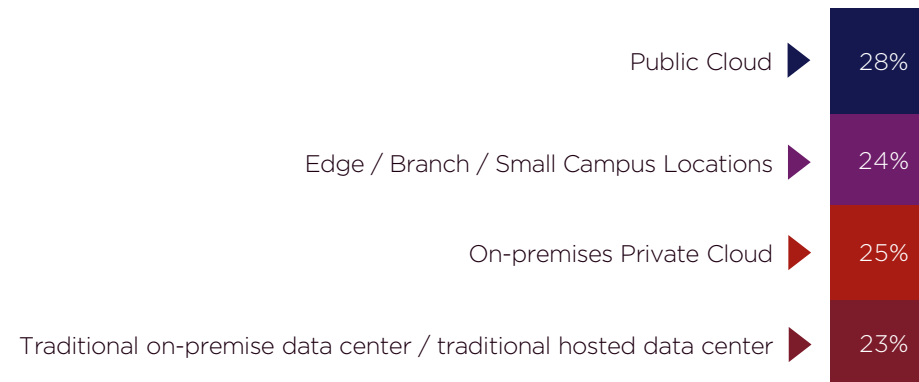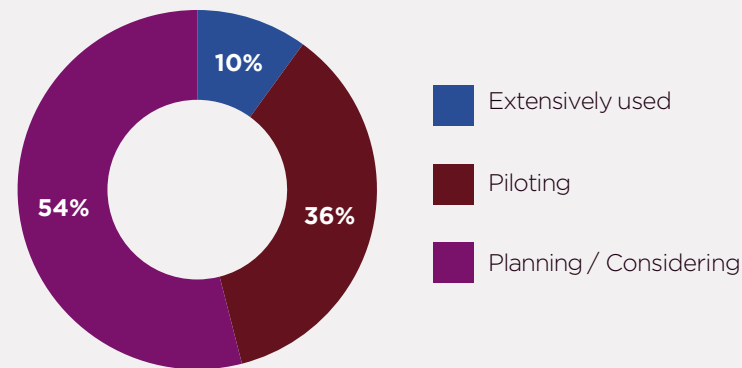
Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Government n=50

Insights by
Markets

Introduction	CIO Strategic Imperatives	Asia/Pacific Insights	Insights by Industries & Markets	Research Methodology	Why Lenovo

Japan | South Korea | India | ANZ | ASEAN+

Japan – AI Journey Overview

The state of AI adoption in Japan is marked by a measured approach, with only 2% of enterprises systematically implementing AI across the organization and the majority in the planning or exploratory phases. This conservative stance is driven by cultural tendencies toward precision and a strong emphasis on integration with existing systems and processes, highlighted as a key challenge. The market is increasingly focused on leveraging AI to address business priorities like agility, revenue growth, and digital innovation, while grappling with inhibitors such as data quality and governance concerns. Moving forward, success hinges on upskilling employees, fostering strong AI partnerships, and ensuring seamless system integration, reflecting Japan's characteristic emphasis on long-term, robust solutions. In Japan, the manufacturing and automotive industries lead AI adoption, with a strong focus on leveraging AI for robotics, quality control, and supply chain optimization to maintain global competitiveness.

Business Priorities for 2025

1	Increasing business agility & responsiveness
2	Improving sustainability
3	Increasing revenues & profit growth
4	Driving digital business innovation
5	Applying emerging AI technologies (e.g., generative AI)
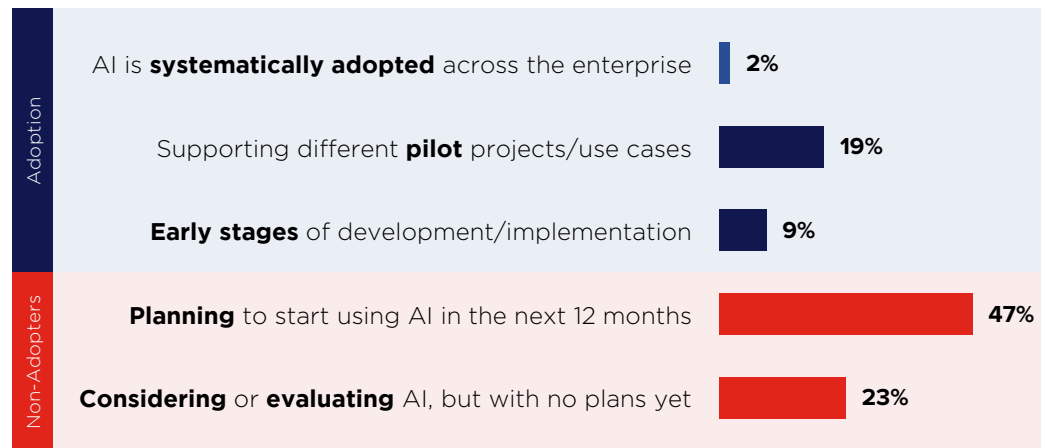
Current AI Adoption

Adoption
- AI is **systematically adopted** across the enterprise — 2%
- Supporting different **pilot** projects/use cases — 19%
- **Early stages** of development/implementation — 9%

Non-Adopters
- **Planning** to start using AI in the next 12 months — 47%
- **Considering** or **evaluating** AI, but with no plans yet — 23%

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	11%	27%
Interpretive AI	80%	39%
Generative AI	9%	34%

■ Past 12 Months   ■ Next 12 Months

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

Growth in AI as a % of IT Spend

2024 → 2025: **5.8x**
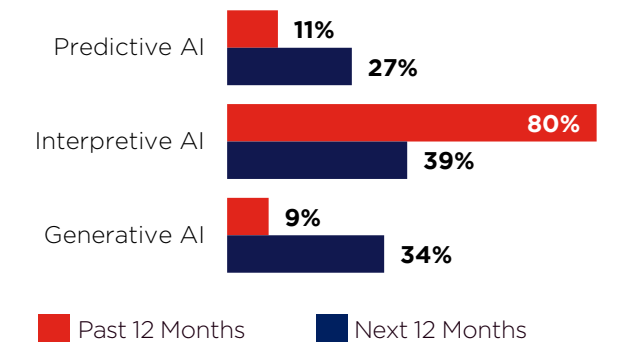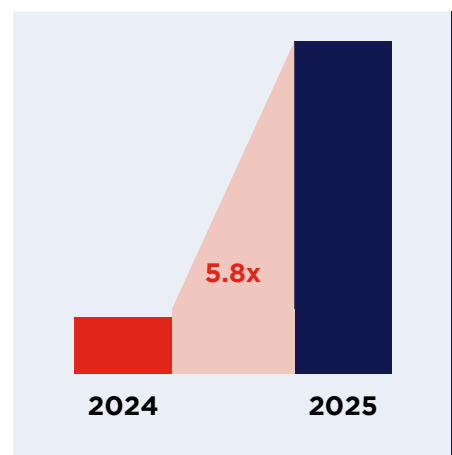
Business Functions Adopting AI Use Cases

1	Finance
2	Marketing
3	IT Ops
4	Sales
5	Cybersecurity

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1	Problems integrating AI with existing systems & processes
2	Data quality issues
3	Lack of budget or management buy-in
4	GRC requirements/security issues
5	Application latency/performance issues

Top Factors for Successful AI Implementation Moving Forward

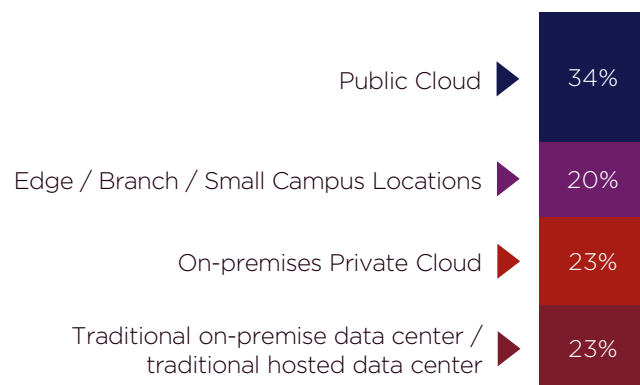| 1	Employee training & upskilling
2	Access to partners with strong AI capabilities
3	Ease of integrating AI with existing systems & processes
4	Access to adequate hybrid compute & storage resources
5	Ensuring data sovereignty & compliance

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Japan n=150

Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | Insights by Industries & Markets | Research Methodology | Why Lenovo

Japan | South Korea | India | ANZ | ASEAN+
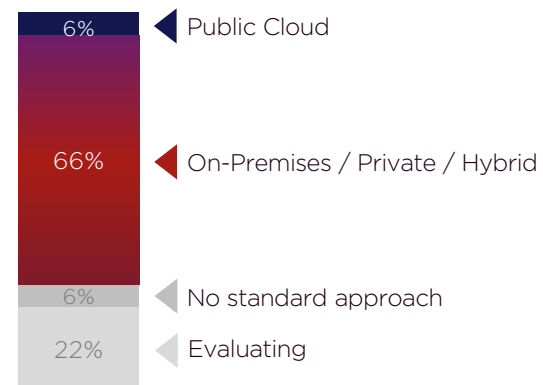
Japan – AI Foundations Overview

In Japan, building the AI-fueled businesses of the future requires a focus on securing the foundations of AI skills, system integrations, data privacy, and partnerships. Organizations are prioritizing hybrid and on-prem infrastructure to ensure data security and align with stringent compliance requirements, reflecting Japan's meticulous approach to AI adoption. Building robust AI foundations requires deep expertise, scalable solutions, and partnerships that deliver measurable outcomes, highlighting the market's emphasis on reliability and long-term value creation.

Survey Insights

39% of organizations highlighted that they will be developing **data management capabilities** in the next 12 months.

Overall **Infrastructure** Deployment – Next 12 Months

Public Cloud	34%
Edge / Branch / Small Campus Locations	20%
On-premises Private Cloud	23%
Traditional on-premise data center / traditional hosted data center	23%

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

Public Cloud	6%
On-Premises / Private / Hybrid	66%
No standard approach	6%
Evaluating	22%

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

1		AI knowledge & expertise (including scaling AI solutions)
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 data security & privacy

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

- 5% Extensively used
- 32% Piloting
- 58% Planning / Considering
- 5% Not Considering

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, Japan n=150

Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | **Insights by Industries & Markets** | Research Methodology | **Why Lenovo**

Japan | **South Korea** | India | ANZ | ASEAN+
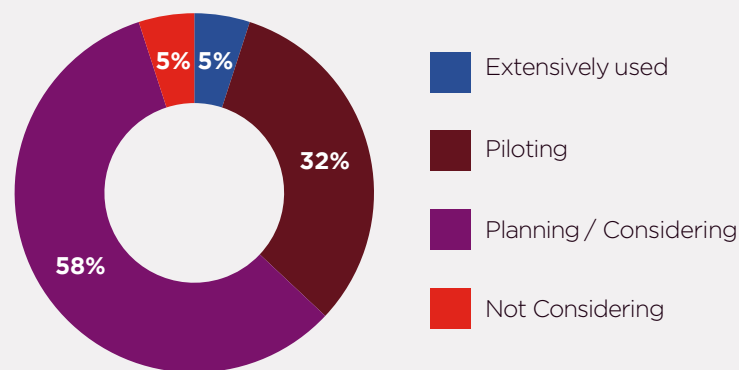
South Korea – AI Journey Overview

In South Korea, AI adoption remains at an early stage, with the vast majority of organizations currently evaluating or planning to implement AI in the next 12 months. This cautious progression stems from challenges in scaling AI across enterprises, IT infrastructure costs, and the integration of AI with existing systems. The focus on leveraging AI stems from highly competitive market dynamics, a stringent regulatory environment, and the need to enhance workforce efficiency to sustain its position as a global innovation leader. Success factors moving forward include developing internal AI expertise, ensuring data sovereignty, and fostering seamless integration with current technologies, reflecting South Korea's emphasis on preparedness and robust infrastructure to support its dominant manufacturing and FSI industries.

Business Priorities for 2025

1. Accelerating time to market
2. Improving regulatory compliance
3. Improving employee productivity
4. Improving sustainability
5. Reducing business risk & cyber threats
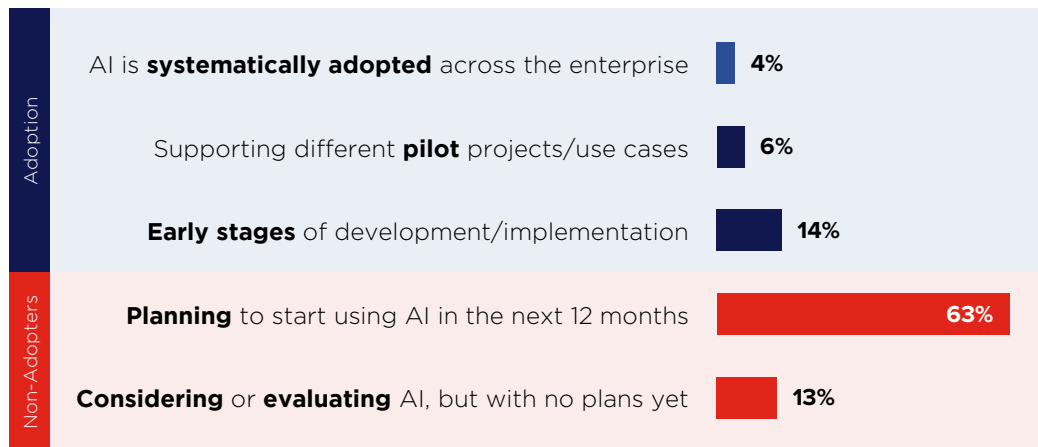
Current AI Adoption

Adoption

- AI is **systematically adopted** across the enterprise — **4%**
- Supporting different **pilot** projects/use cases — **6%**
- **Early stages** of development/implementation — **14%**

Non-Adopters

- **Planning** to start using AI in the next 12 months — **63%**
- **Considering** or **evaluating** AI, but with no plans yet — **13%**

AI Implementations by Category:

- Predictive AI — **19%**
- Interpretive AI — **38%**
- Generative AI — **43%**

■ Next 12 Months

Growth in AI as a % of IT Spend

6.2x

2024 → 2025
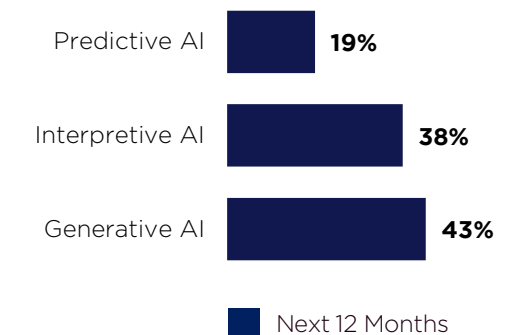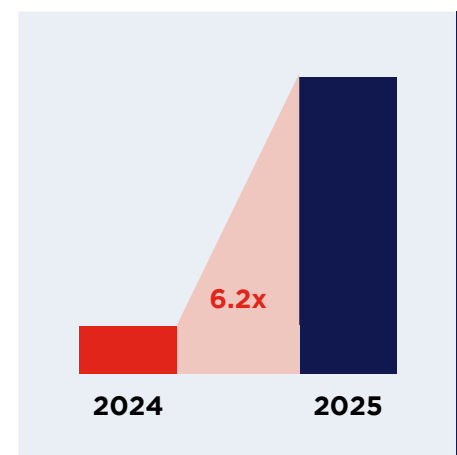
Business Functions Adopting AI Use Cases

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

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1. Challenges scaling AI across the enterprise (including lack of departmental support)
2. IT infrastructure/network costs
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. Availability of internal AI expertise
2. Employee training & upskilling
3. Ensuring data sovereignty & compliance
4. Availability of quality data
5. Ease of integrating AI with existing systems & processes

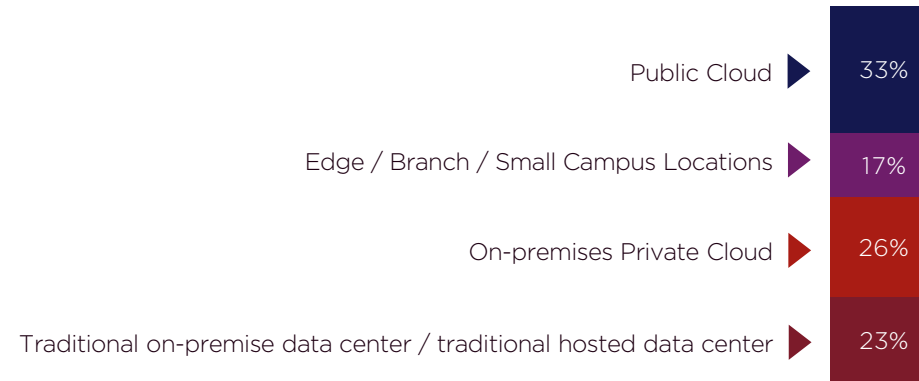Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, South Korea n=100

South Korea – AI Foundations Overview

South Korea's AI pivot is rooted in its ambition to maintain global competitiveness by strengthening data management capabilities and ensuring secure, scalable AI foundations. The heavy reliance on on-prem and hybrid infrastructure reflects a market need to prioritize data sovereignty and meet local compliance requirements while driving innovation. Partnerships with AI solution providers are critical to overcoming challenges in security, scalability, and AI modeling, enabling organizations to capitalize on AI's transformative potential in a highly digital and technologically advanced economy. Over a quarter of organizations are piloting AI-powered devices, reflecting a growing interest in testing their potential to enhance productivity and streamline operations.

Survey Insights

37% of organizations highlighted that they will be developing **data management capabilities** in the next 12 months.

Overall **Infrastructure** Deployment – Next 12 Months

Public Cloud	33%
Edge / Branch / Small Campus Locations	17%
On-premises Private Cloud	26%
Traditional on-premise data center / traditional hosted data center	23%

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

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

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

- 6% Extensively used
- 26% Piloting
- 68% Planning / Considering

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

| Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | Insights by Industries & Markets | Research Methodology | Why Lenovo |

Japan | South Korea | India | ANZ | ASEAN+
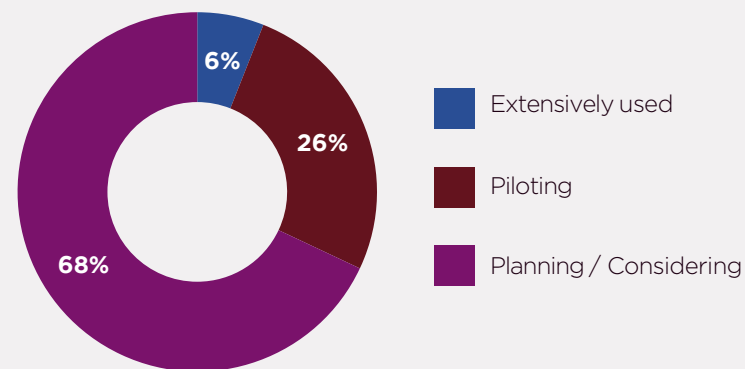
India – AI Journey Overview

AI adoption in India is progressing rapidly, driven by the country's growing digital economy, a strong emphasis on customer-centric innovation, and the need to meet regulatory demands in a diverse and dynamic market. Organizations are prioritizing AI to enhance customer satisfaction, streamline time-to-market, and unlock employee productivity, reflecting India's competitive and service-oriented business landscape. However, challenges such as limited AI expertise, data quality issues, and the cost of infrastructure highlight the importance of building robust ecosystems with strong partnerships and scalable solutions. Success lies in India's ability to leverage its vast talent pool through targeted upskilling and create synergies between emerging AI technologies and existing business operations.

Business Priorities for 2025

1 Improving regulatory compliance
2 Improving customer experience & satisfaction
3 Accelerating time to market
4 Improving employee productivity
5 Applying emerging AI technologies (e.g., generative AI)

Current AI Adoption

Adoption
- AI is **systematically adopted** across the enterprise — 7%
- Supporting different **pilot** projects/use cases — 27%
- **Early stages** of development/implementation — 17%

Non-Adopters
- **Planning** to start using AI in the next 12 months — 30%
- **Considering** or **evaluating** AI, but with no plans yet — 19%

AI Implementations by Category: Past and Future

- Predictive AI — 25% (Past 12 Months), 23% (Next 12 Months)
- Interpretive AI — 61% (Past 12 Months), 33% (Next 12 Months)
- Generative AI — 14% (Past 12 Months), 43% (Next 12 Months)

■ Past 12 Months ■ Next 12 Months

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

Growth in AI as a % of IT Spend

2.7x

2024 → 2025
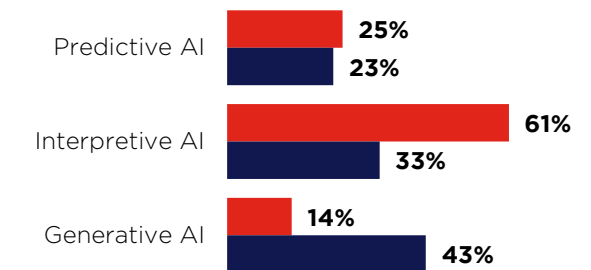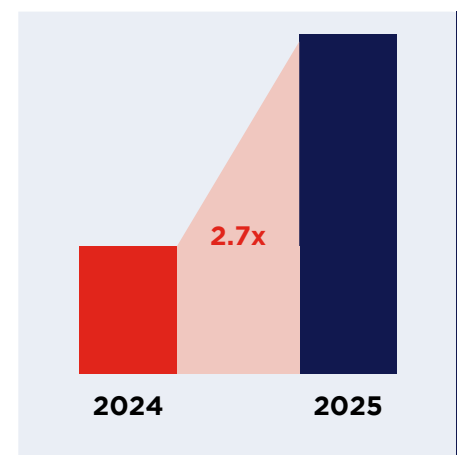
Business Functions Adopting AI Use Cases

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

Inhibitors That Resulted in AI Projects Not Meeting Expectations

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

Top Factors for Successful AI Implementation Moving Forward

1 Employee training & upskilling
2 Availability of quality data
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, India n=150

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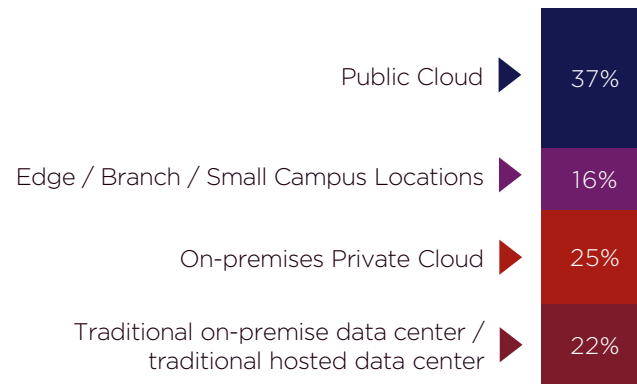Japan | South Korea | India | ANZ | ASEAN+

India – AI Foundations Overview

In India, organizations need to address the unique challenge of integrating AI into a highly cost-sensitive yet innovation-driven market. They seek to balance scalable AI adoption with measurable business outcomes, highlighting the importance of robust data management, security, and deep partnerships with AI providers. This approach reflects India's dynamic ecosystem, where businesses prioritize solutions that deliver tangible value while navigating constraints related to infrastructure and expertise availability. In the future, AI-powered PCs are expected to play a pivotal role in driving productivity and innovation, supporting the workforce with real-time, data-driven decision-making and enhanced business outcomes.

Survey Insights

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

Overall **Infrastructure** Deployment – Next 12 Months

- Public Cloud — 37%
- Edge / Branch / Small Campus Locations — 16%
- On-premises Private Cloud — 25%
- Traditional on-premise data center / traditional hosted data center — 22%

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

- Public Cloud — 25%
- On-Premises / Private / Hybrid — 63%
- No standard approach — 4%
- Evaluating — 10%
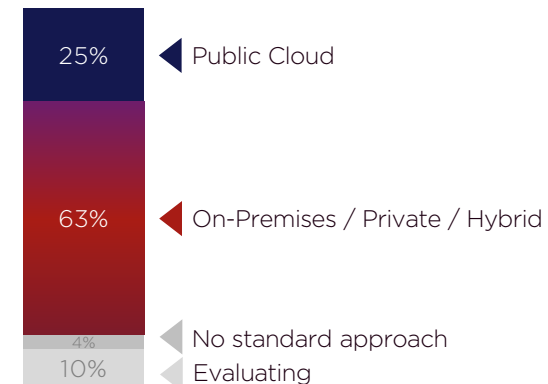
What Do Organizations **Seek in a Partner**?

1. Support for data management
2. Support for data security & privacy
3. Ability to help our organization deliver measurable business outcomes
4. Depth of partnerships with AI solution providers (ISVs, alliance partners)

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

- 11% Extensively used
- 35% Piloting
- 53% Planning / Considering
- 1% Not Considering

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, India n=150

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Japan | South Korea | India | ANZ | ASEAN+
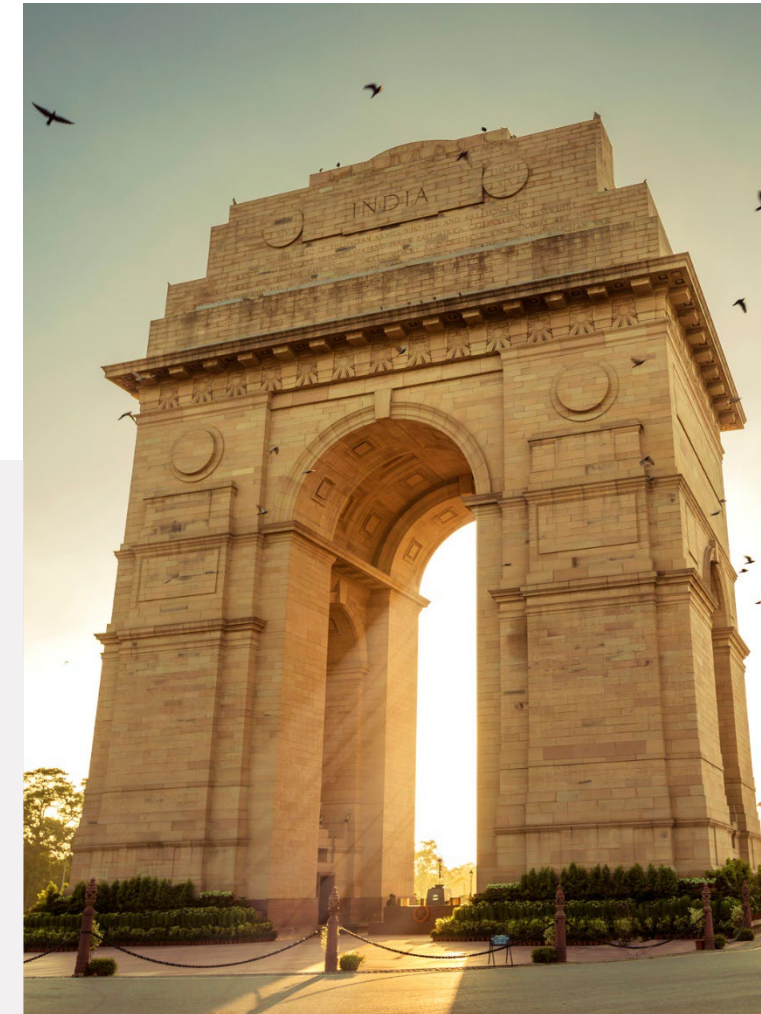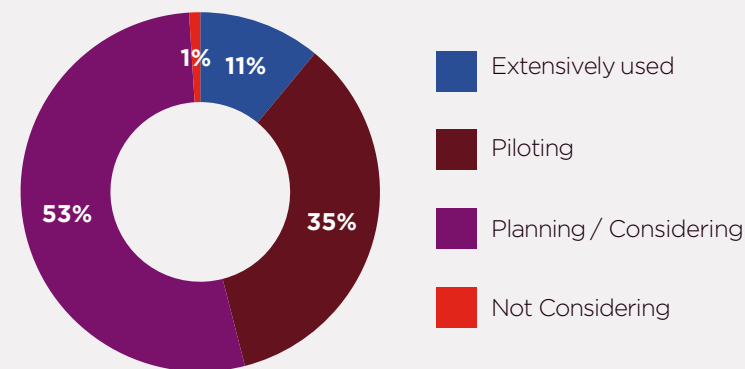
ANZ – AI Journey Overview

The ANZ region's AI adoption is shaped by a focus on improving decision-making and mitigating business risks, reflecting its dynamic business environment. Organizations are leveraging AI to drive digital innovation and ensure compliance, while addressing challenges such as data quality and budgetary constraints. Success in AI implementation relies on fostering internal expertise, investing in AI-powered systems, upskilling the workforce, and building strategic partnerships, showcasing a practical and future-oriented approach. In ANZ, AI adoption is more advanced in financial services and healthcare, with growing investments in predictive analytics and cybersecurity to address industry-specific challenges and enhance customer experiences.

Business Priorities for 2025

1	Driving digital business innovation
2	Enhancing decision making
3	Reducing business risk & cyber threats
4	Improving regulatory compliance
5	Improving employee productivity

Current AI Adoption
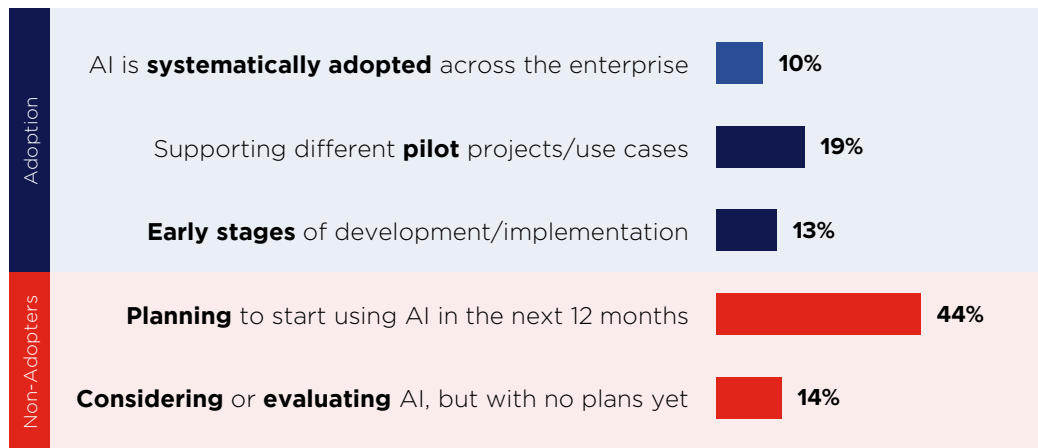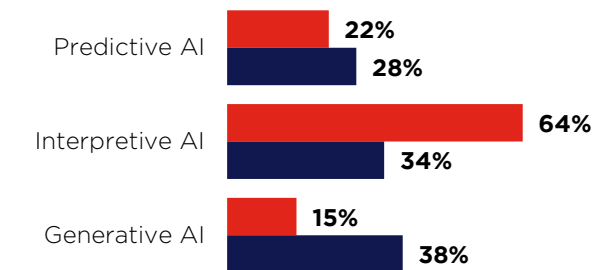
Adoption
- AI is **systematically adopted** across the enterprise — 10%
- Supporting different **pilot** projects/use cases — 19%
- **Early stages** of development/implementation — 13%

Non-Adopters
- **Planning** to start using AI in the next 12 months — 44%
- **Considering** or **evaluating** AI, but with no plans yet — 14%

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	22%	28%
Interpretive AI	64%	34%
Generative AI	15%	38%

■ Past 12 Months ■ Next 12 Months

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

Growth in AI as a % of IT Spend

4.0x

2024 → 2025
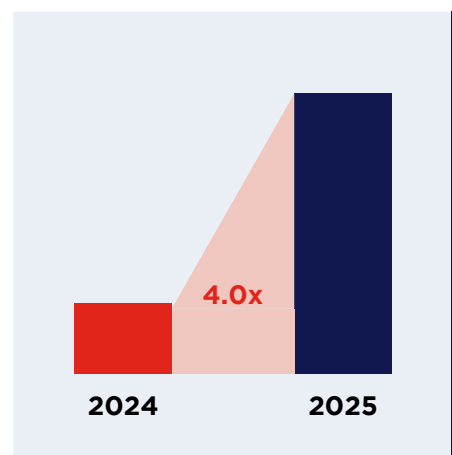
Business Functions Adopting AI Use Cases

1	IT Ops
2	Sales
3	Finance
4	Cybersecurity
5	Engineering/R&D

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1	Data quality issues
2	Unrealistic expectations from senior management
3	IT infrastructure/network costs
4	Lack of budget or management buy-in
5	GRC requirements/security issues

Top Factors for Successful AI Implementation Moving Forward

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, ANZ n=130

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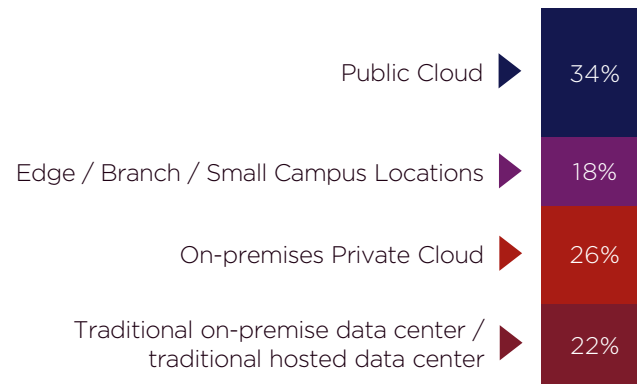Japan | South Korea | India | ANZ | ASEAN+

ANZ – AI Foundations Overview

Establishing strong AI foundations in ANZ demands a focused effort to tackle data quality issues, a key factor that often undermines the success of AI initiatives. Businesses in the region are gravitating towards hybrid and private cloud solutions, aiming to achieve the right mix of flexibility and compliance for their AI workloads. To ensure scalability and efficiency, organizations are increasingly relying on partnerships for expertise in data management, AI development, and tailored infrastructure solutions. These partnerships are crucial as they provide access to specialized skills, advanced technologies, and scalable solutions that are often cost-prohibitive or unavailable internally, enabling faster and more effective AI deployment.

Survey Insights

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

Overall **Infrastructure** Deployment – Next 12 Months

Public Cloud	34%
Edge / Branch / Small Campus Locations	18%
On-premises Private Cloud	26%
Traditional on-premise data center / traditional hosted data center	22%

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

38%	Public Cloud
45%	On-Premises / Private / Hybrid
4%	No standard approach
13%	Evaluating

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

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

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

- 12% Extensively used
- 25% Piloting
- 63% Planning / Considering
- 1% Not Considering

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, ANZ n=130

| Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | Insights by Industries & Markets | Research Methodology | Why Lenovo |
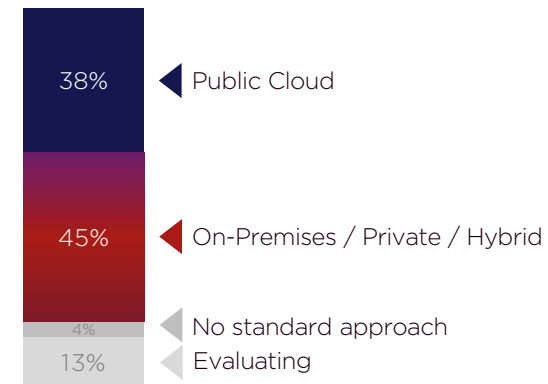
Japan | South Korea | India | ANZ | ASEAN+
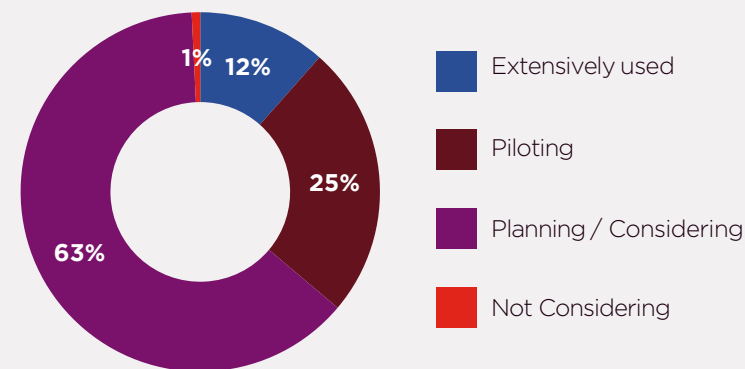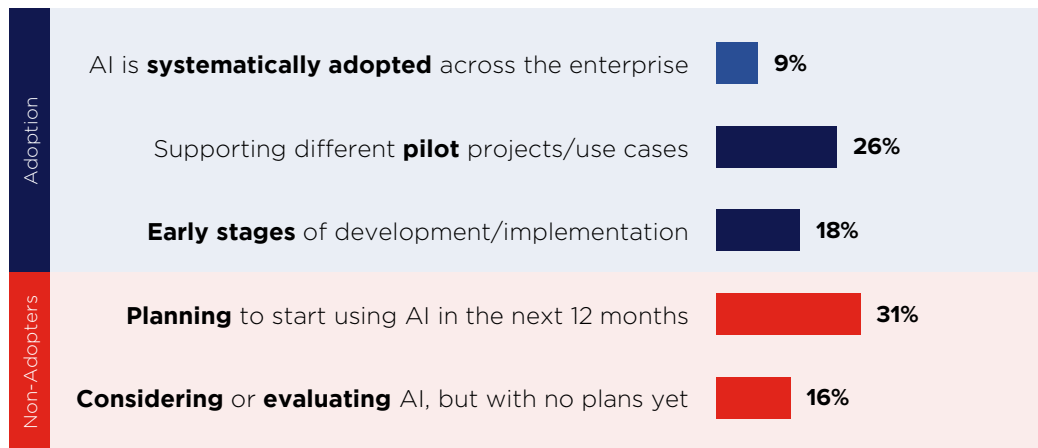
ASEAN+ – AI Journey Overview

AI adoption in ASEAN is characterized by the region's diverse economic landscape, where businesses are focusing on optimizing supply chains, improving employee productivity, and leveraging emerging AI technologies to remain competitive in fast-growing markets. While challenges such as data quality and integration complexities persist, success lies in forming partnerships with strong AI providers and ensuring data sovereignty, which is particularly critical in markets with varying regulatory environments. Singapore, as a regional hub, leads with advanced AI maturity and infrastructure, contrasting with other ASEAN nations where adoption is often in earlier stages due to resource and expertise constraints.

Business Priorities for 2025

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

Current AI Adoption

Adoption
- AI is **systematically adopted** across the enterprise — 9%
- Supporting different **pilot** projects/use cases — 26%
- **Early stages** of development/implementation — 18%

Non-Adopters
- **Planning** to start using AI in the next 12 months — 31%
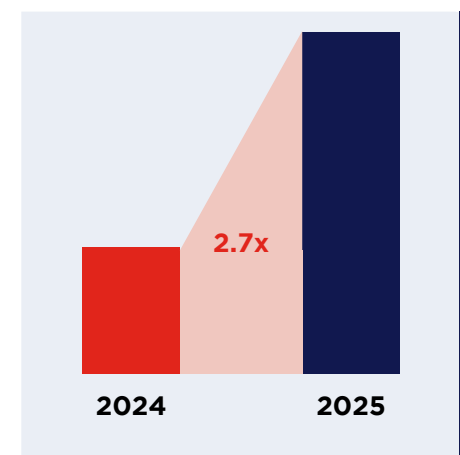- **Considering** or **evaluating** AI, but with no plans yet — 16%

AI Implementations by Category: Past and Future

Category	Past 12 Months	Next 12 Months
Predictive AI	23%	21%
Interpretive AI	66%	36%
Generative AI	11%	42%

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

Growth in AI as a % of IT Spend

2024 → 2025: **2.7x**
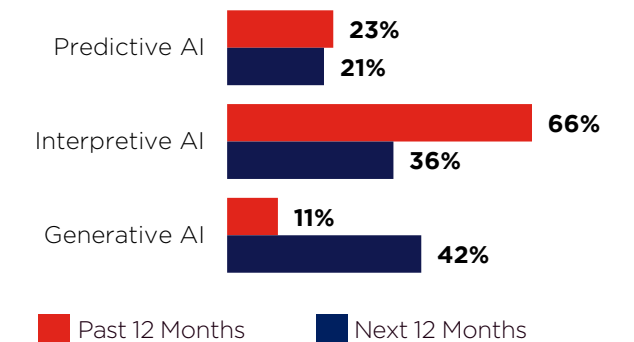
Business Functions Adopting AI Use Cases

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

Inhibitors That Resulted in AI Projects Not Meeting Expectations

1	Data quality issues
2	Problems integrating AI with existing systems & processes
3	Lack of budget or management buy-in
4	Application latency/performance issues
5	Challenges deploying AI solutions at endpoints

Top Factors for Successful AI Implementation Moving Forward

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

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, ASEAN+ n=370

Introduction | CIO Strategic Imperatives | Asia/Pacific Insights | Insights by Industries & Markets | Research Methodology | Why Lenovo

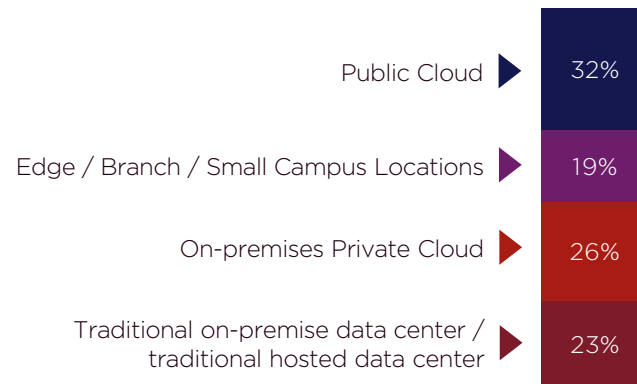Japan | South Korea | India | ANZ | ASEAN+

ASEAN+ – AI Foundations Overview

Building AI foundations in ASEAN requires addressing data quality as the top challenge, reflecting the region's diverse data ecosystems and varying levels of digital maturity across countries. Organizations are heavily reliant on hybrid and on-prem infrastructure for AI workloads, highlighting a preference for control, compliance, and localized approaches in many ASEAN markets. While Singapore leads with advanced cloud adoption and robust AI expertise, other countries in the region face greater reliance on partnerships for data management, AI modeling, and scaling solutions, underscoring a need for capacity-building initiatives tailored to local contexts.
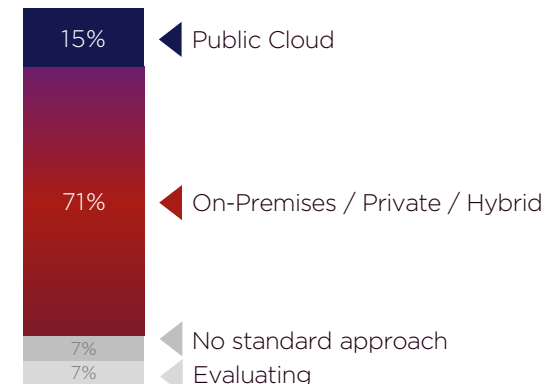
Survey Insights

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

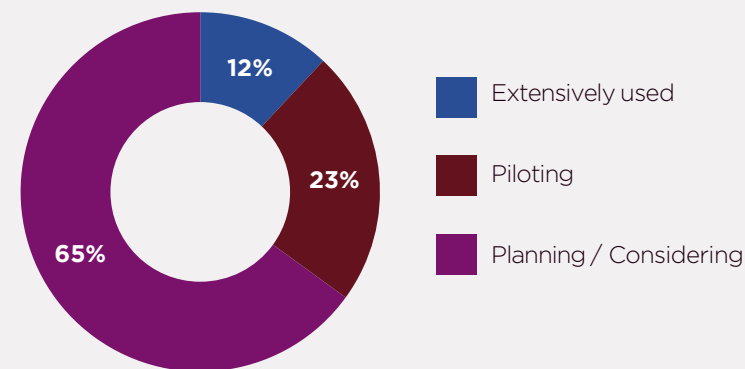## Overall **Infrastructure** Deployment – Next 12 Months

Category	%
Public Cloud	32%
Edge / Branch / Small Campus Locations	19%
On-premises Private Cloud	26%
Traditional on-premise data center / traditional hosted data center	23%

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

Category	%
Public Cloud	15%
On-Premises / Private / Hybrid	71%
No standard approach	7%
Evaluating	7%

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

1	Support for data management
2	AI knowledge & expertise (including scaling AI solutions)
3	Support for data security & privacy
4	Support for AI modeling & development

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

- 12% Extensively used
- 23% Piloting
- 65% Planning / Considering

Source: IDC CIO Playbook 2025 Survey, commissioned by Lenovo, ASEAN+ n=370

Research
Methodology

CIO Playbook 2025 Research Methodology

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

Markets Covered	Sample Size
Japan	**150**
South Korea	**100**
India	**150**
ANZ	**130**
ASEAN+	**370**

Focus Industries	Sample Size
BFSI	**134**
Retail	**116**
Manufacturing	**100**
Telco / CSP	**139**
Healthcare	**55**
Government	**50**
Other	**306**

Sampling by Organization Role

418	482

■ C-Suite ■ C-1

Sampling by Employee Size

126	304	470

■ 250 to 999 employees

■ 1,000 to 4,999 employees

■ 5,000 or more employees

Lenovo
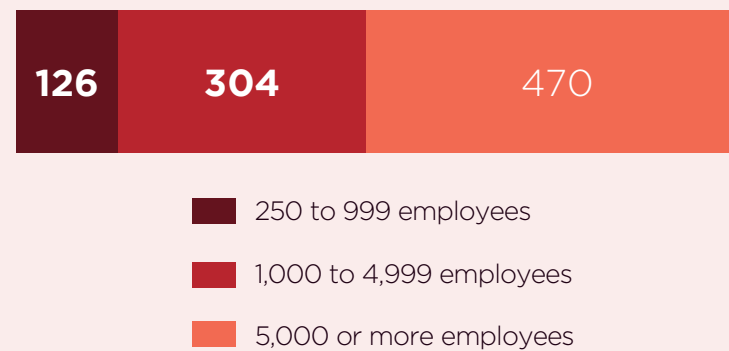
Smarter AI for All

Personalized, protected and easy to scale, Smarter AI delivers the outcomes that matter most to you and your business. With full stack AI hardware, software and service solutions, we're bringing the transformative power of AI to industries, organizations and people of all kinds.

Lenovo
AI Infrastructure and Devices

8	80+
Platform Categories	AI-Ready Platforms

Energy efficient, secure AI Infrastructure (Edge/HPC compute, storage, networking) and powerful AI PCs and workstations.

Lenovo
Services and Solutions

4	180+
Global COEs	Countries Served

Validated industry, use case solutions and global expertise for faster, scalable AI deployments.

Lenovo
AI Innovators
Partner Ecosystem

165+	>30K
Enterprise AI Solutions	Channel Partners

Tested, trusted global AI partner solutions and ecosystem of AI ISVs, and channel partners.

Lenovo Hybrid AI Advantage for Enterprises

Productivity
Achieve personal, enterprise productivity and innovation

Agility
Accelerate time-to market with high performing, scalable private AI

Trust
Build and consume responsible, trusted AI and manage and protect all your data

Lenovo Hybrid AI Advantage in Action

SharonAI
Through Lenovo's TruScale service, SharonAI is democratizing AI computing by deploying GPU-dense servers, offering affordable, on-demand GPU access to startups and researchers.

Learn More

University of Pisa
With Lenovo Neptune®, Italy's Largest University Supercomputer Becomes More Sustainable, accelerating research activities and reducing energy consumption by up to 40%.

Learn More

AI Hathboor Bikal.ai
Supports AI innovation and development with an energy efficient datacenter and HPC as a service solution.

Learn More

Liv Forever
Liv is our groundbreaking AI avatar for people living with dementia and Alzheimer's. Liv offers 24/7 companionship and guidance with the warmth of human understanding.

Learn More

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

Learn More

Discover everything you need to succeed with AI
www.lenovo.com/SmarterAI

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Bring AI to your data with Lenovo and partners

#1
business PC, workstation provider

#1
in infrastructure reliability

#1
supercomputer provider globally

Lenovo Neptune®
6th generation liquid-cooling innovation

Sources: ITIC Global Server Reliability (Mar 2024), Benchmark Report (June 2024) & Top500.org (June 2024)

The Lenovo Hybrid AI Advantage

Lenovo AI Library
Suite of functional & vertical AI use case accelerators

Lenovo

Technology
+
Partner ecosystem
+
Expertise
+
Responsible AI

- Services
- Models & Software
- Data
- Infrastructure & Devices

Services
Full lifecycle services

Advisory Services	Support Services	Managed Services	Deployment Services	TruScale (As-a Service)

Devices
Powerful AI PCs, workstations & phones for hybrid workplaces

Lenovo **ThinkPad**   **motorola** FOR BUSINESS   Lenovo **ThinkStation**

Edge
Get powerful data-center-like computing performance

Lenovo **ThinkEdge**

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

Lenovo **ThinkAgile**

Lenovo **ThinkSystem**

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