



The 2030 IT Blueprint

How Mid-Market Enterprises Are
Reimagining Modernization



Table of Contents

Introduction

3

Methodology & Background

4

Future of IT

5

What This Means for CIOs

8

Cloud Strategy

9

The Workload Realignment Trend

10

Evolving VMware Landscape

11

Legacy Applications Anchor Hybrid Necessity

12

What This Means for CIOs

13

IT Modernization

14

What This Means for CIOs

17

Modernization Challenges

18

The Human Barrier

19

The Financial Barrier

20

The Risk Barrier

22

Planning Strategy

24

Short-term / Long-term Planning

26

What This Means for CIOs

28

Conclusion

29

Respondent Profile

30



Introduction

Mid-market enterprises face a distinct challenge: they shoulder the same IT security, compliance, and modernization pressures as large enterprises, but must deliver with smaller teams, tighter budgets, and greater agility. Despite their importance, this segment is often overlooked in research that tends to spotlight only small businesses or the Fortune 500.

This report fills that gap. Drawing on insights from 500 IT leaders at midsized organizations, the findings reveal a market that is ambitious in vision but constrained by real world barriers. CIOs are investing heavily in AI, automation, and

hybrid deployment strategies to prepare for 2030, even as they grapple with persistent skill shortages, financial pressures, and rising risk.

A clear theme emerges: mid-market IT leaders are crafting strategies that balance adaptability today with transformation for tomorrow.

Increasingly, they are relying on trusted partners to accelerate progress while managing costs, compliance, and security. More than a collection of data points, this report offers a roadmap for CIOs and IT leaders, providing a window into the priorities and decisions that will define mid-market IT success through the end of the decade.

“The TierPoint 2030 IT Blueprint reinforces what so many leaders are experiencing first-hand: hybrid IT is laying the groundwork for true progress. By embracing this approach, organizations are not just keeping pace—they’re building the agility and resilience needed to thrive in a fast-changing world. Hybrid IT is enabling people to modernize securely, drive innovation, and confidently take on new possibilities like AI and edge computing. It’s about empowering teams to shape meaningful change, unlock growth, and create lasting impact for their organizations and communities.”

Eric Arcese

Vice President, Global Partner Marketing
Dell Technologies



Methodology & Background

This report is based on original research conducted by TierPoint in partnership with Drive Research to capture the perspective of today's mid-market IT leaders and decision makers. Unlike studies that focus on small businesses or large enterprises, this research centers specifically the mid-market organizations with 101 to 1,000 employees that must modernize with both scale and agility.

The survey ran from July 8 to August 19, 2025, engaging IT executives and practitioners through a 39-question online study with an average completion time of 7 minutes. With a statistically valid sample and a 4% margin of error, the insights presented here accurately reflect the priorities, challenges, and strategies shaping mid-market IT modernization through 2030.

Research at a Glance

Respondents

500 IT Decision-Makers (ITDMs)

Focus

Mid-market Enterprises

Confidence Level

95% with a margin of error of $\pm 4\%$

Topics

IT Strategy, Modernization, Cloud, Security, and Resilience



Future of IT

The future of IT is being shaped by two powerful forces: the rapid rise of AI and the growing need for adaptable, resilient operating models. Mid-market IT leaders aren't just experimenting anymore, they're building the foundational capabilities that will dictate their competitiveness over the next decade. The investment priorities make this clear: artificial intelligence (56%), AI-ready infrastructure (51%), and AI-powered cybersecurity (49%) dominate roadmaps for the next five years. What was once exploration is now execution.

Organizations recognize that AI will underpin nearly every future initiative, from safeguarding sensitive data to powering new digital products. The leaders

pulling ahead aren't treating AI as an add-on; they're embedding it into the core architecture of their environment.

This shift has also accelerated a broader operational transformation. By 2030, two-thirds of mid-market IT leaders expect to operate within a blended operating model that combines internal capabilities with managed services. This isn't a conversation about outsourcing versus in-house talent, it's the evolution of a more flexible, scalable IT foundation. One that can grow, shift, and adapt at the speed of business.

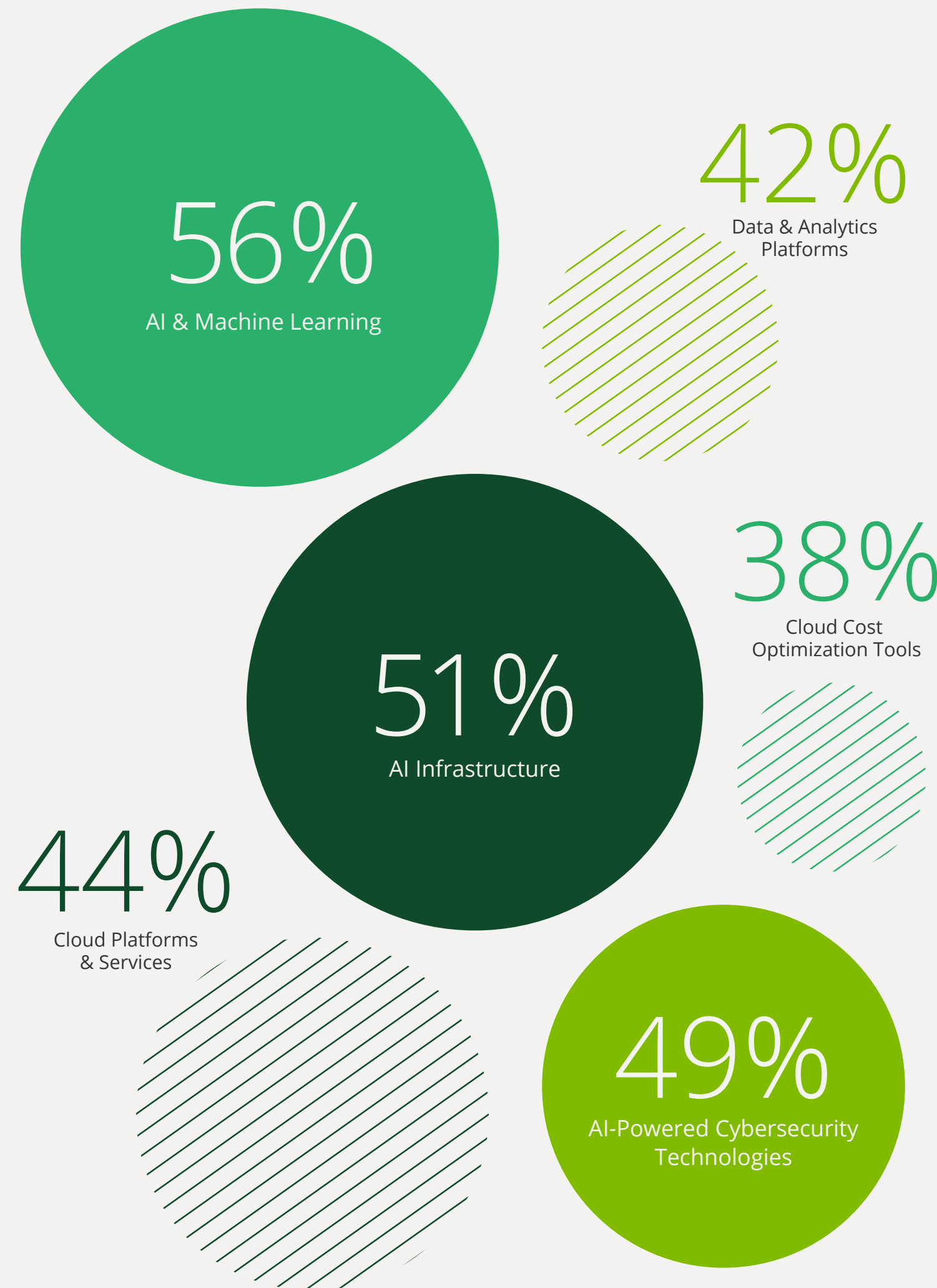
"We're only just beginning to scratch the surface of AI's potential and the infrastructure shifts required to support it. Organizations can't simply hire their way out of the IT skills gap. That's why they're turning first to automation and, just as importantly, to trusted advisors who can help them navigate the dizzying array of new solutions, accelerate adoption, and extend the capabilities of their teams. In the mid-market especially, where resources are leaner, advisors are becoming essential partners—helping companies implement AI, cloud, and security strategies that would otherwise be out of reach."

Adam Edwards
Chief Executive Officer
Telarus



AI Dominates Emerging Tech Investments

The top emerging technologies and strategies that IT Decision Makers and their organizations are planning to adopt or invest in over the next 5 years were artificial intelligence & machine learning (56%), AI infrastructure (51%), and AI-powered cybersecurity technologies (49%). Non-AI technologies and strategies mentioned were cloud platforms and services (44%), data and analytics platforms (42%), and cloud cost optimization tools (38%).



Across all of these decisions, the goal is consistent: deliver tangible business outcomes. IT leaders are aligning investments to improve enterprise collaboration, tighten compliance and security, and optimize operations. Even in larger enterprises where cost discipline remains a parallel priority, innovation is no longer optional. The future favors organizations that can modernize efficiently by balancing ambition with financial realism.

Taken together, these trends reveal the dual mindset defining today's IT leadership: bold in vision, pragmatic in execution. Blended operating models offer resilience in an unpredictable landscape. AI promises differentiation, but requires new skills, disciplined governance, and a more mature operational core. The organizations that thrive will be the ones investing not only in breakthrough technologies, but in the operating foundations that make sustainable transformation possible.



85%
Hybrid Mix of In-House
and Outsourced Services

66%
Hybrid Mix of In-House
and Outsourced Services

22%
In-House

12%
Outsourced

● IT Decision Makers

● Owners and C-Suite Officials

Hybrid Deployments Dominate 2030 Outlook

By 2030, 2 in 3 IT Decision Makers expect IT at their organization to be structured as a hybrid mix of in-house and outsourced services (66%). Some expect it to be mostly in-house (22%) while fewer expect it to be mostly outsourced (12%).

Owners and C-Suite Officials

were more likely to expect their organization to be structured as a hybrid mix of in-house and outsourced services (85%).

34%

33%

31%

- Increasing Collaboration and Productivity
- Improving Security or Compliance
- Improving Operational Efficiency

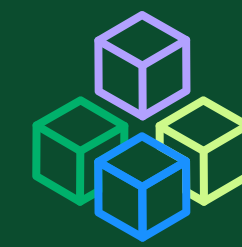
Collaboration, Efficiency, & Security Drive Tech Adoption

IT Decision Makers cited increasing collaboration and productivity (34%), improving security or compliance (33%), and improving operational efficiency (31%) as the primary drivers or goals behind their organization's adoption of new technologies.

IT Decision Makers from **larger organizations (with 501 to 1,000 employees)** were more likely to cite reducing IT costs/expenses (34%).

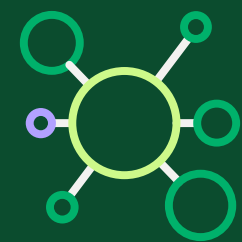


What This Means for CIOs



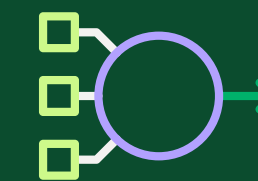
Modern IT Requires a Blended Operating Model

Build governance and security frameworks that work across both internal and partner-delivered services.



AI is Not Optional

Create an AI strategy that moves past pilot projects, identifying infrastructure and security use cases where AI can deliver significant value.



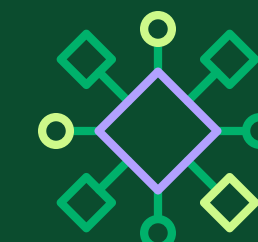
Outcomes Outweigh Tools

Prioritize business outcomes by enhancing collaboration, ensuring compliance, and driving efficiencies, rather than focusing solely on acquiring new tools.



Cost Pressures Will Persist

Maintain strict financial discipline and regularly reassess priorities as cost pressures continue during periods of transformation.



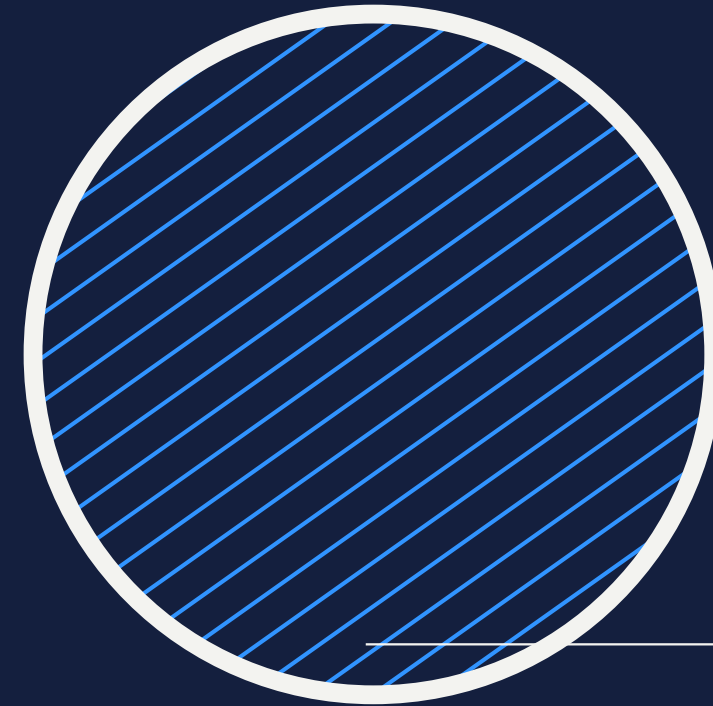
Future-Ready Means Adaptable

Build technology foundations that can adapt easily to new requirements, acknowledging that future innovations will demand ongoing flexibility.

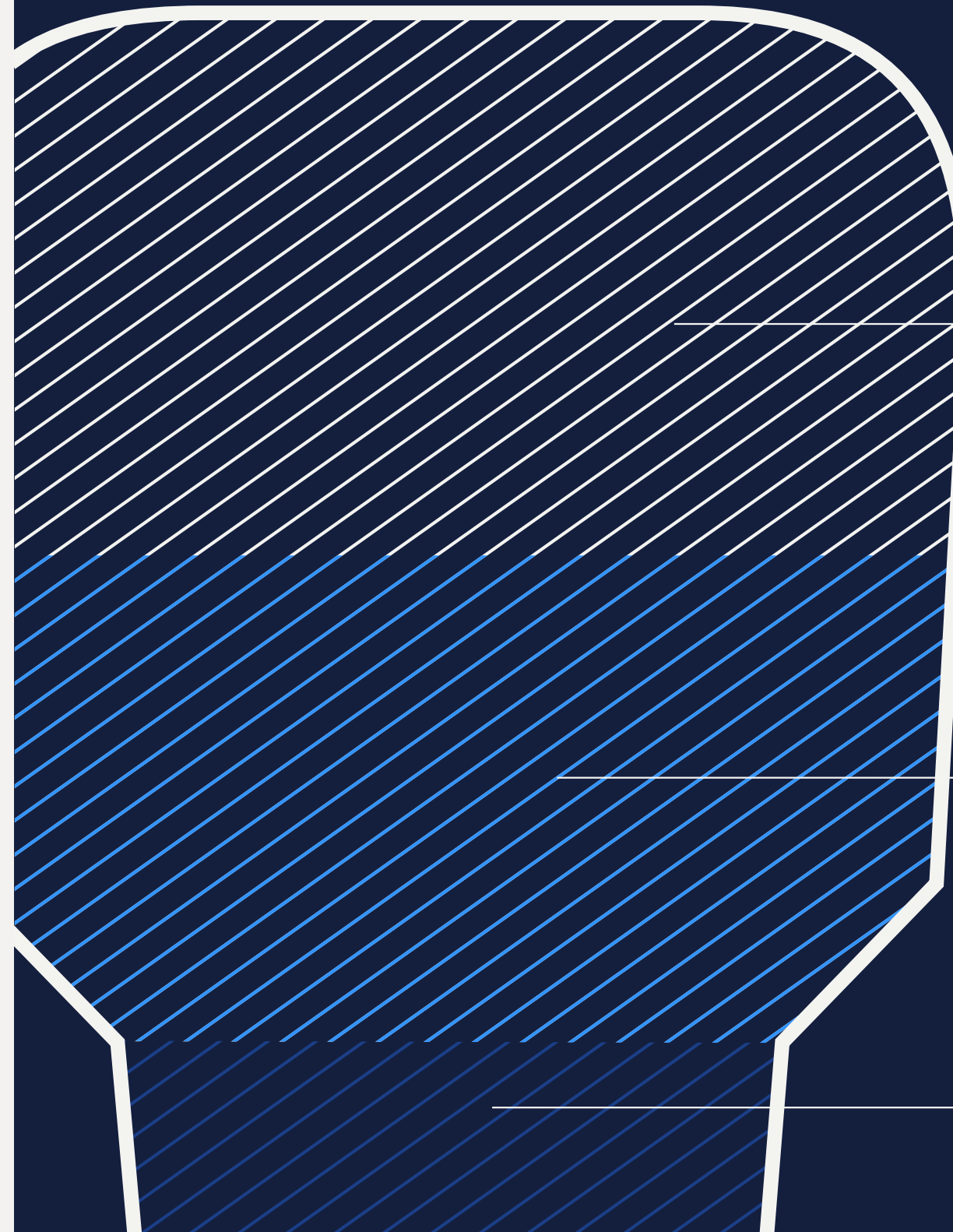


Cloud Strategy

Mid-market organizations are rethinking their cloud strategies and moving past the old cloud-first versus on-premises binary. Instead, leaders are embracing a hybrid-by-design mindset that puts flexibility and intentional workload placement at the center of IT strategy. This pragmatic stance is shaped by three major trends: the rapid emergence of selective cloud repatriation as teams optimize for risk and efficiency; growing disruption tied to VMware's future, prompting fresh infrastructure assessments; and the ongoing influence of legacy applications, which make an "all cloud, all at once" approach unrealistic for most.



10%
Cloud-First Strategy



46%
Hybrid-by-Design

32%
Cloud-Smart Strategy

12%
All-on-Premises or Colocation

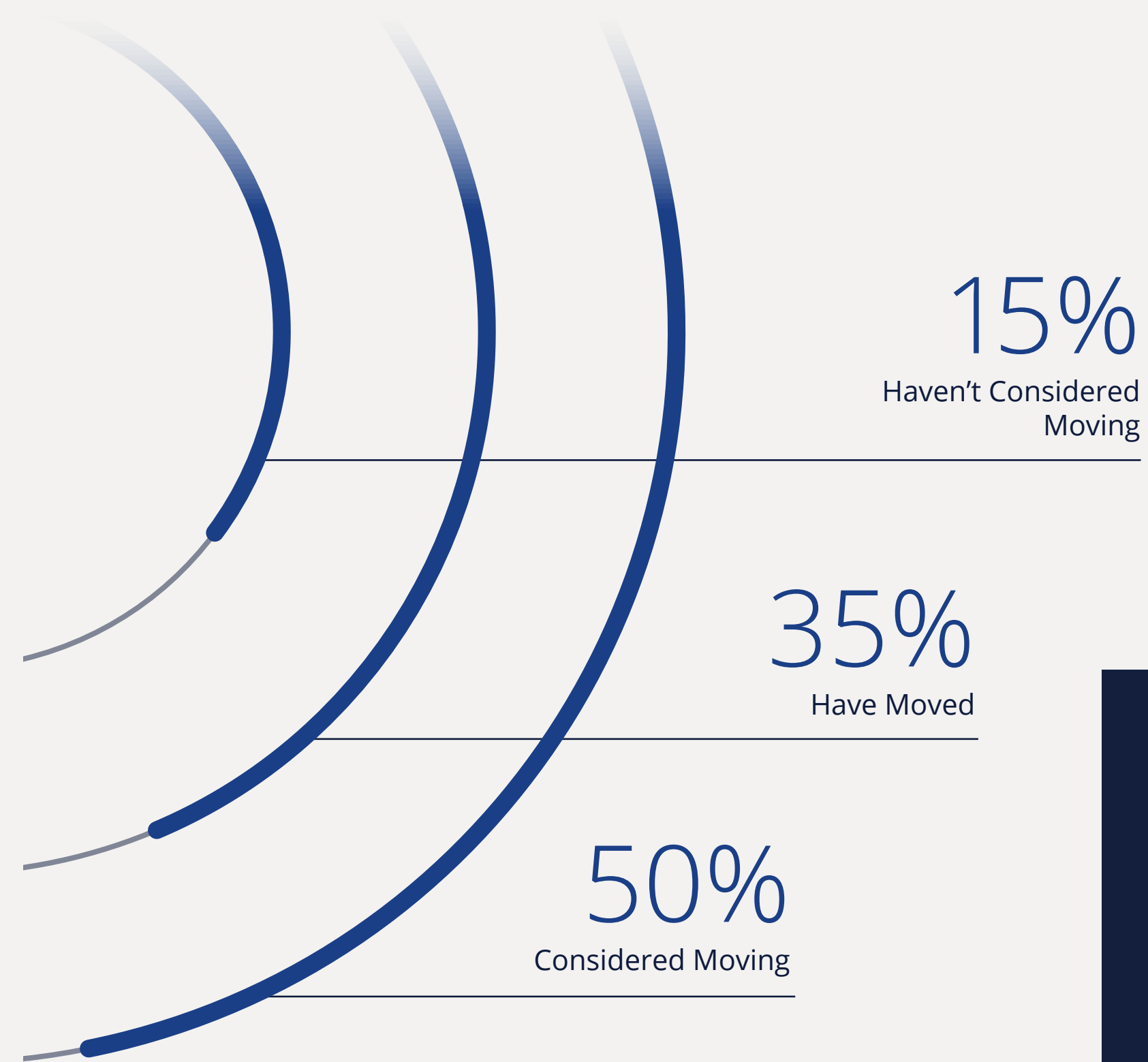
Hybrid Leads, Smart Follows

Almost half of IT Decision Makers described their organization's primary cloud strategy as hybrid-by-design (46%). Some described a cloud-smart strategy (32%), while a few indicated an all-on-premises or colocation (12%) or cloud-first strategy (10%).

Owners and C-Suite officials were more likely to describe their organization's primary cloud strategy as cloud-first (26%).

The Workload Realignment Trend

While 50% of IT leaders have considered moving certain workloads out of the public cloud, only 35% have actually taken action. Rather than signaling a move away from cloud, this reflects a more mature, cloud-smart approach to architecture. Organizations are evaluating where each workload truly performs best — whether that's public cloud, private cloud, or on-premises — and adjusting accordingly. Drivers like security and compliance (67%), performance and control (60%), and cost (53%) are prompting teams to realign workloads, not abandon the cloud.



Rethinking Where Workloads Belong

Half of IT Decision Makers (50%) have considered moving certain workloads out of the public cloud, and 35% have taken selective action. Only 15% report no desire to move at all.

“The shift toward hybrid IT isn’t just about where workloads live—it’s about how organizations make smarter technology decisions. By 2030, success will belong to those who can dynamically balance control and agility, leveraging both in-house expertise and trusted external partners. At Avant, we see hybrid not as a compromise but as a strategy—one that aligns business outcomes with the right blend of infrastructure, security, and managed services.”

Drew Lydecker

Chief Executive Officer & President
Avant



Evolving VMware Landscape Accelerates Hybrid Strategies

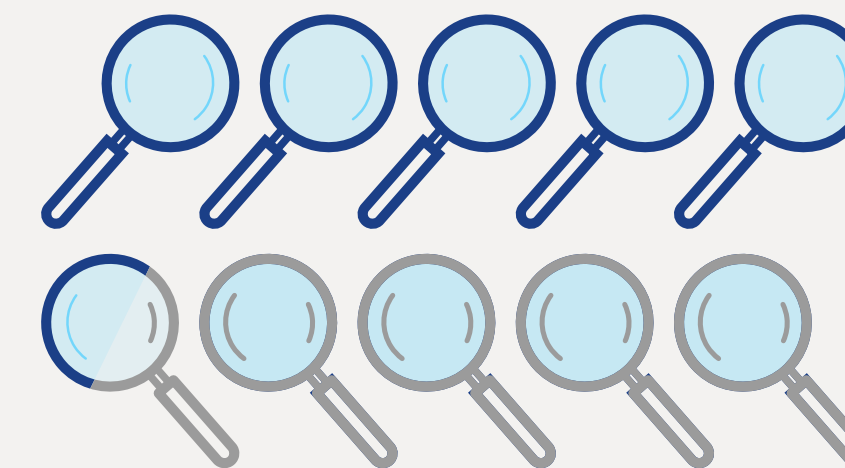
As organizations navigate an evolving VMware landscape, including broader shifts in pricing models, product direction, and partner relationships, many are taking a fresh look at how their infrastructure can be best positioned for the future. Over half (52%) of IT leaders report they are evaluating their options. This moment is reshaping decision frameworks: CIOs are emphasizing flexibility, minimizing lock-in risk, and designing architectures that can adapt smoothly as vendor dynamics change. The result is continued momentum toward hybrid-by-design models that balance performance and risk, preserve choice, and help organizations stay agile no matter how the market evolves.

This evolution is reinforcing a broader truth across the industry: modernization is no longer a solo effort. Success depends on the coordination of multiple technologies, providers, and services working in harmony to support agility and growth. As hybrid environments expand, organizations are prioritizing partnerships that help them simplify complexity, enhance protection, and build architectures that can scale confidently into the future.

“The emphasis on AI and edge computing as strategic drivers highlights how innovation is reshaping IT priorities. These technologies are not only enabling new capabilities but also prompting organizations to rethink infrastructure, data management, and workforce skills. They are looking for partnerships to not only help drive innovative ideas but also execute on the technical outcomes.”

Shawn McFarland

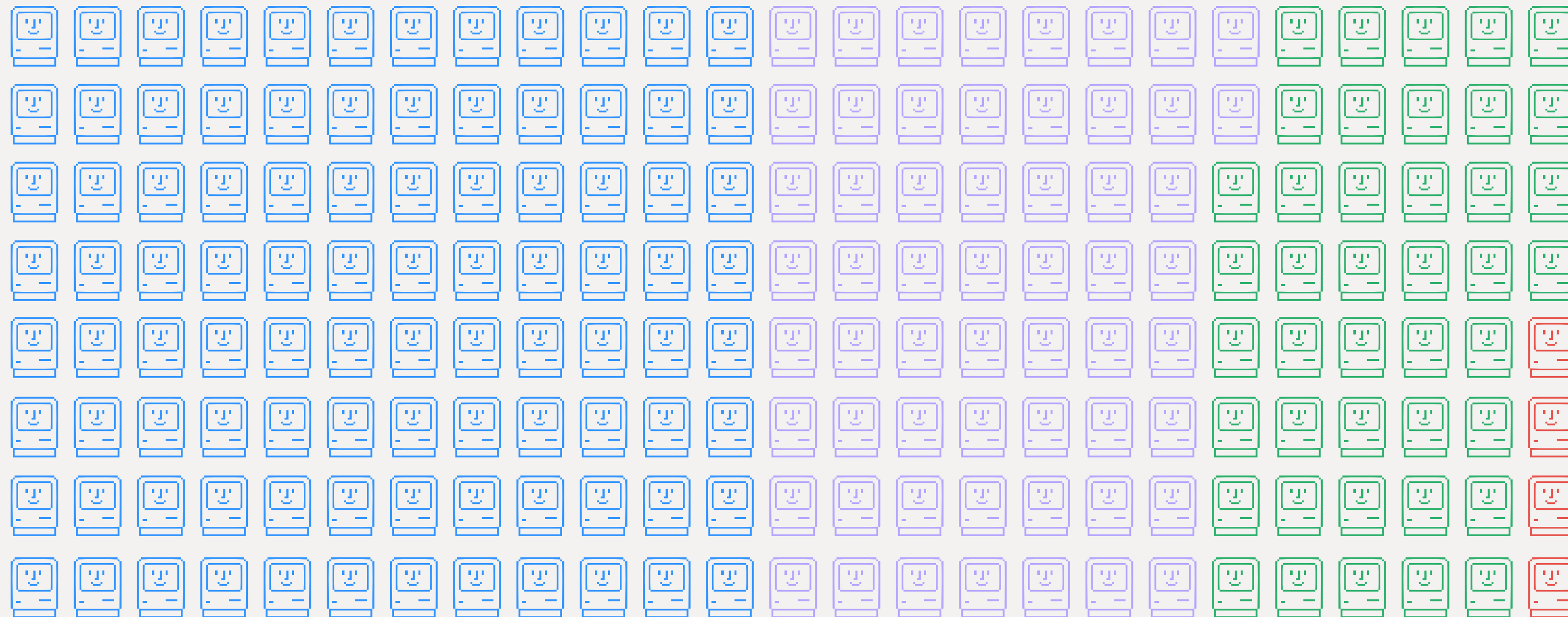
Vice President of Enterprise Sales
West at SHI International Corp



52% of Respondents are Evaluating their Workloads

Legacy Applications Still Common in IT

A quarter to a half of the current applications used by IT Decision Makers are considered “legacy” (i.e., not cloud-native or not recently modernized) (48%). Some indicated higher usage [i.e., 51% to 75% (29%) or 76% to 100% (2%)] or lower usage [i.e., less than 25% (21%)].



Legacy Applications Anchor Hybrid Necessity

Nearly half of current enterprise applications remain legacy: not cloud-native and not recently modernized. These applications are deeply embedded in core business processes and often customized over years or tied to industry-specific workflows. Their enduring importance makes full cloud migration challenging. As a result, hybrid models remain not only relevant but essential. They give organizations the flexibility to run legacy systems where they operate most reliably, while still modernizing selectively.



What This Means for CIOs



Confidence Doesn't Equal Simplicity

Build decision processes that require every IT and cloud choice to be measured against security, compliance, performance, and cost tradeoffs.



Hybrid is Here to Stay

Make workload placement a conscious, ongoing decision by regularly reviewing where each application runs based on security, compliance, and business requirements.



Design for Vendor Resilience

Assess key platform dependencies and build flexibility into your architecture to adapt as business needs or vendor models change.



Legacy Apps Demand Pragmatism

Assess all legacy applications and design hybrid strategies that support essential systems while preparing for future modernization.



Maturity is Flexibility

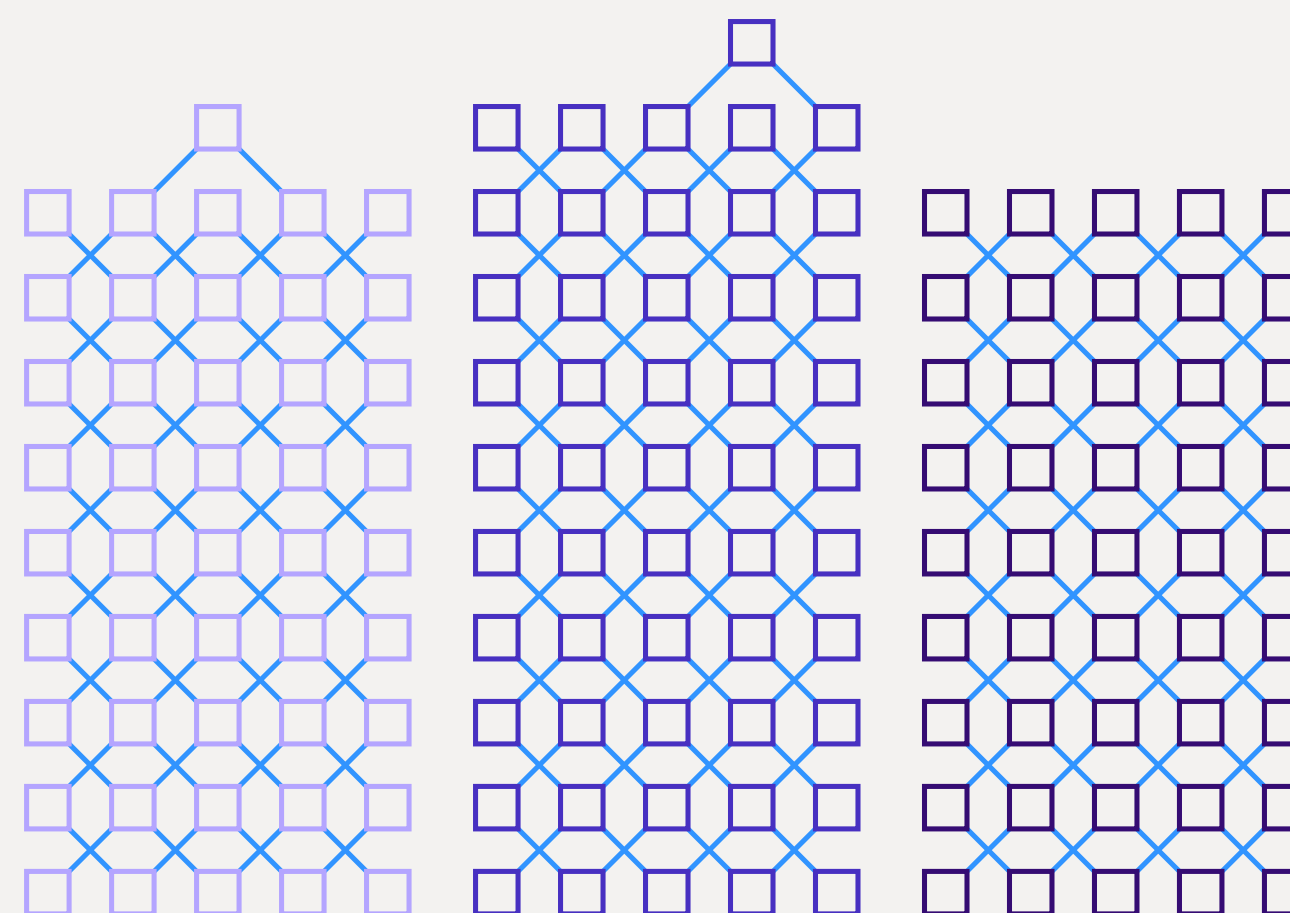
Focus on building flexibility into the cloud strategy, moving workloads to the platforms that best meet current needs instead of defaulting to one environment.



IT Modernization

Every CIO knows modernization is no longer optional, it's vital for staying competitive. For mid-market enterprises, the modernization roadmap is bold and includes: integrating AI and automation (51%), upgrading core infrastructure (46%), and strengthening cybersecurity and compliance (45%). What stands out isn't a single "hero" initiative, but a coordinated approach. They're advancing multiple priorities at once, accepting that the path forward is multi-dimensional.

But ambition alone won't deliver transformation. Feasibility and compliance are the real gatekeepers. Nearly half of leaders say technical feasibility is the first filter for modernization priorities, followed closely by regulatory requirements and business alignment. In practice, that means many of the flashier ideas stay on the whiteboard until CIOs can prove they're practical, safe, and compliant.



46%

Infrastructure Modernization

51%

AI/Automation Initiatives

45%

Enhancing Cybersecurity & Compliance Upgrades

AI, Cybersecurity, Infrastructure are Top Modernization Priorities

The top IT modernization priorities for organizations over the next 5 years are integrating AI or automation initiatives (51%), infrastructure modernization (i.e., hardware, networking, data center) (46%), and enhancing cybersecurity and compliance upgrades (45%). Notably, no single priority overwhelmingly dominates, indicating that organizations are navigating a diverse mix of strategic goals.

"AI, edge, and automation will force IT to modernize continuously, not occasionally. To keep pace, organizations will need adaptable architectures and partner guidance, so sustainability, automation, and innovation evolve together. The winners will avoid rigid platforms and instead plug into a flexible ecosystem that grows with them."

Justin Marano

Chief Revenue Officer

Sandler Partners



The challenges are familiar, but they remain formidable. Security and privacy risks, talent shortages, and opaque IT costs continue to slow momentum. In larger organizations, entrenched resistance to change and overwhelming cloud complexity add new layers. Disruption isn't just a system risk; it's a business risk. A risk that can impact customer experience and visible operational continuity.

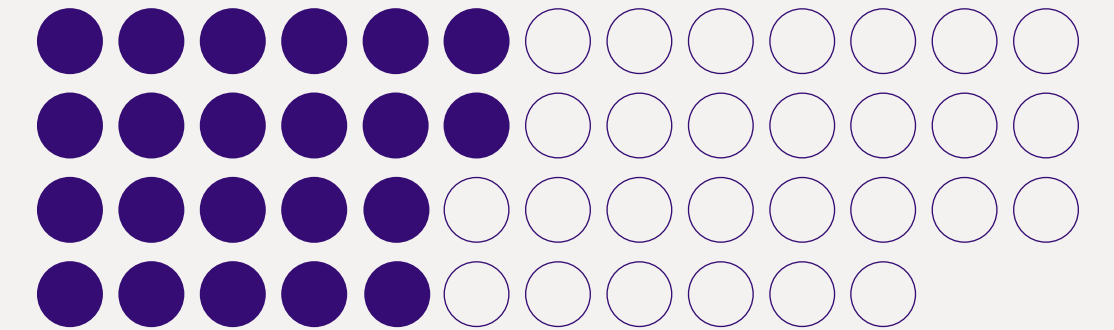
The lesson for leadership: IT modernization is an ongoing balancing act. Success requires equal parts bold action and careful management of risk, cost, and capabilities. It's not a sprint, but a persistent process—driven by informed decisions, clear priorities, and a commitment to advancing the business even when the way forward is incremental. Recognize the value of slow, steady progress, and be ready to pause, recalibrate, and push through obstacles as they arise.

“Modern IT leaders need more than tools; they need an ecosystem of partners working in concert to deliver complementary capabilities across infrastructure, data, operations, and AI. At Pure, we advance the Enterprise Data Cloud with AI-ready data services and robust cyber resilience and security to strengthen disaster recovery, secure hybrid operations without one-size-fits-all decisions, and enable flexible, secure modernization tailored to each organization's needs.”

Patrick S. Finn
Chief Revenue Officer
Pure Storage

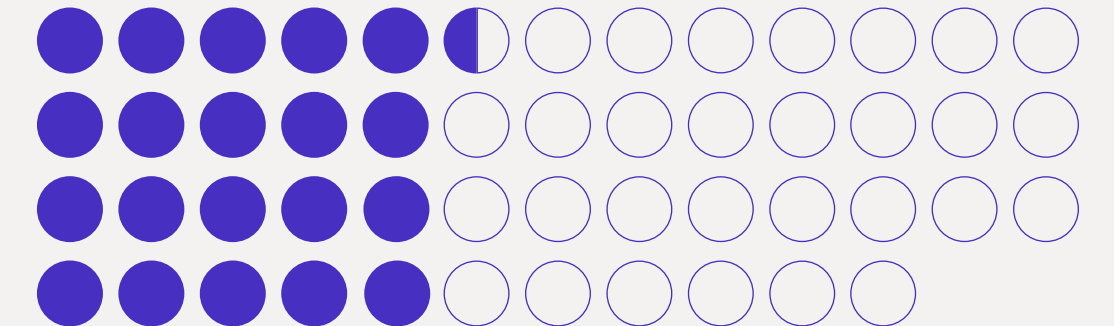
44%

Technical Feasibility



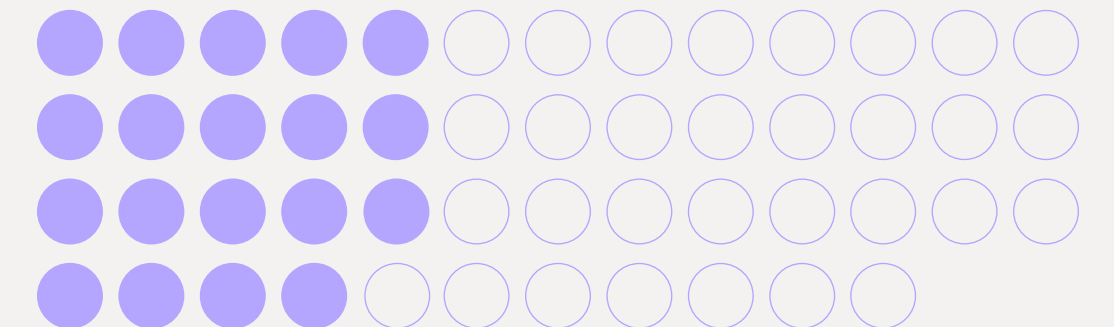
41%

Regulatory/ Compliance Requirements



38%

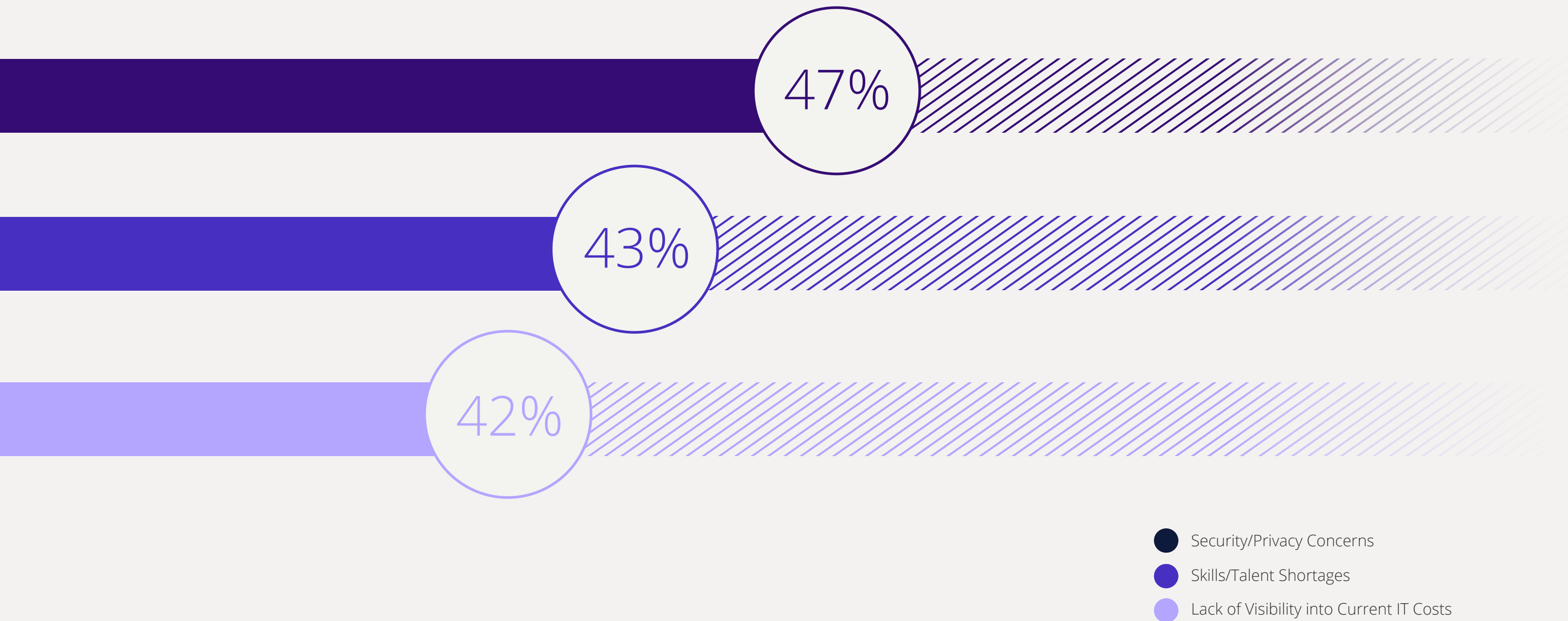
Alignment with Business Goals



Prioritizing Modernization

Feasibility and Compliance First: IT Decision Makers cited technical feasibility (44%), regulatory or compliance requirements (41%), and alignment with business goals (38%) as the most important considerations when prioritizing modernization initiatives internally.

IT Decision Makers from smaller organizations (with 101 to 500 employees) were more likely to prioritize regulatory or compliance requirements (45%) and resource/staffing capacity (36%).



Skills Shortage, Security Impact IT Modernization

IT Decision Makers noted security/privacy concerns (47%), skills/talent shortages (43%), and lack of visibility into current IT costs (42%) as top challenges they are currently facing, or anticipate facing, in their IT modernization.

IT Decision Makers from larger organizations (with 501 to 1,000 employees) were more likely to cite organizational resistance to change (38%) and having too many options/cloud complexity (36%) as challenges.

Owners and C-Suite officials were more likely to cite fear of disrupting current operations or customer experience as a challenge (42%).

“There is no greater threat to a business’s long term success than a security breach. From losing customer confidence to PR nightmares that can set you back years, it’s no wonder that Cloud Security is the top priority for IT Leaders. Implementing a solid strategy that covers all possible threats and includes a blend of human response and AI-powered monitoring can be daunting, but it’s an absolute must for companies in a day where ransomware and hacking attacks dominate the headlines.”

Christopher Shubert

Vice President, Channel Sales
AppDirect

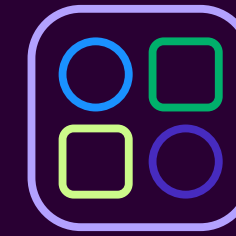


What This Means for CIOs



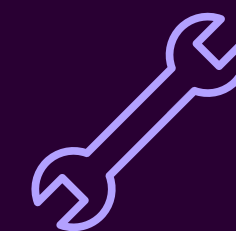
Ground Ambition in Feasibility

Evaluate every innovative idea against compliance rules, technical feasibility, and strategic business alignment before investing further.



Don't Chase One Initiative

Pursue modernization across AI, infrastructure, and security in parallel, allocating resources to multiple domains instead of focusing on a single initiative.



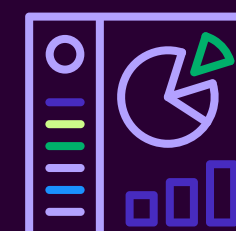
Close the Visibility Gap

Establish processes and tools that deliver continuous, clear visibility into IT costs to inform better technology investment decisions.



Address Culture, Not Just Tech

Invest in change management strategies to build organizational buy-in and overcome cultural resistance alongside technology upgrades.



Protect Continuity

Develop plans to maintain uninterrupted operations and protect customer trust throughout transformation efforts, prioritizing business continuity in every change.



Modernization Challenges

Modernization isn't just about technology choices. The hardest barriers are structural, rooted in people, money, and risk. For mid-market enterprises, these three forces often dictate the pace of transformation more than the technology itself.

1. The Human Barrier – Skills and Culture

2. The Financial Barrier – Cost and Complexity

3. The Risk Barrier – Security and Resilience

56%

Cloud Architecture and Engineering

52%

Cybersecurity and Compliance

Cloud, Security Skills Gaps Persist

A majority of IT Decision Makers believe IT skills related to cloud architecture and engineering (56%) and cybersecurity and compliance (52%) are lacking in their organization.

“As IT leaders confront widening skills gaps, the focus shouldn't be on mastering infrastructure—it should be on accelerating business outcomes through applications and innovation. By upskilling internal teams while embracing automation and partnering with managed service providers like TierPoint to handle the complex infrastructure, organizations can redirect talent toward higher-value initiatives that truly move the needle.”

Chris Scaglione

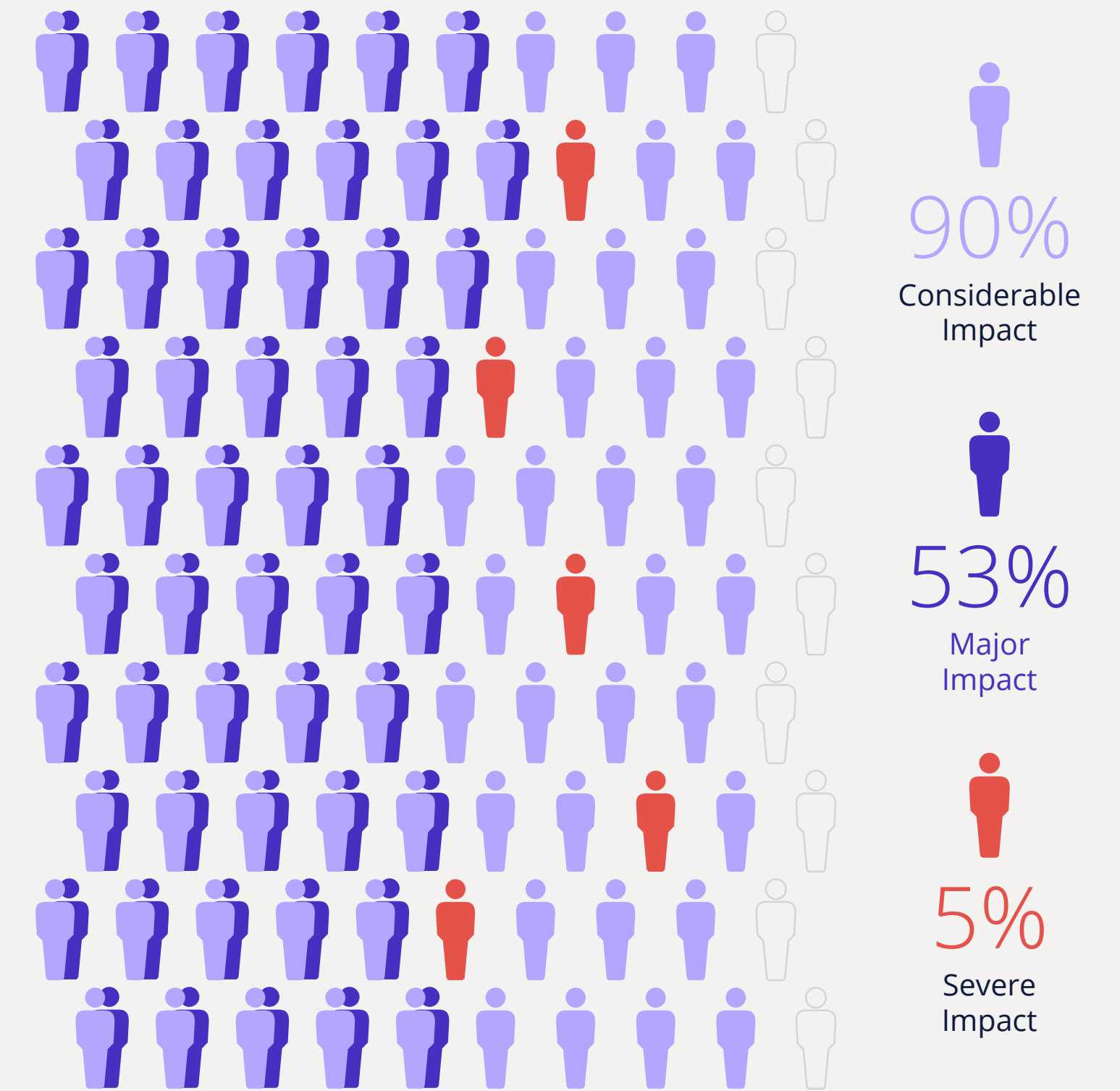
Chief Transformation Officer,
TierPoint



1. The Human Barrier – Skills and Culture

Ambition runs high in the mid-market, but talent shortages remain a major obstacle. Skills in cloud architecture, cybersecurity, AI/ML, and data analytics are especially hard to come by, with nine out of ten IT leaders reporting that these gaps are actively slowing down technology adoption.

Leaders are taking a multi-pronged approach: automate where possible, upskill existing staff, partner with MSPs, and hire selectively. Larger organizations lean more on recruitment; smaller ones stretch existing teams and build strategic partnerships.. Yet across the board, CIOs recognize that culture and capacity are as much a barrier as capability. Internal resistance to change, burnout, and competing priorities often blunt the impact of even well-designed initiatives.



Skill Shortages Block Tech Adoption

9 in 10 IT Decision Makers indicated IT skill shortages have had a considerable impact on their organization’s ability to adopt new technologies in the last year, including over half who indicated it has had a major (53%) or severe impact (5%).



Takeaway

Treat talent development, strategic partnerships, and automation as simultaneous priorities: invest in all three to ensure innovation can keep pace with business demands and unexpected challenges.



2. The Financial Barrier – Cost and Complexity

Cloud spending has moved beyond discretionary; it now represents a quarter to half of the typical IT budget, and the share continues to rise. In response, CIOs are turning to FinOps practices, partner expertise, and built-in optimization tools to regain control, and many are seeing real results.

But cost management alone doesn't solve the budgeting challenge. Cloud pricing is complex, usage patterns shift quickly with new initiatives, and modernization efforts particularly around AI, automation, security, and app transformation, add new layers of consumption and costs. Even experienced CIOs admit their ability to forecast accurately is limited. Without clearer financial visibility, long-term modernization planning becomes harder, and the risk of delaying strategic initiatives grows.



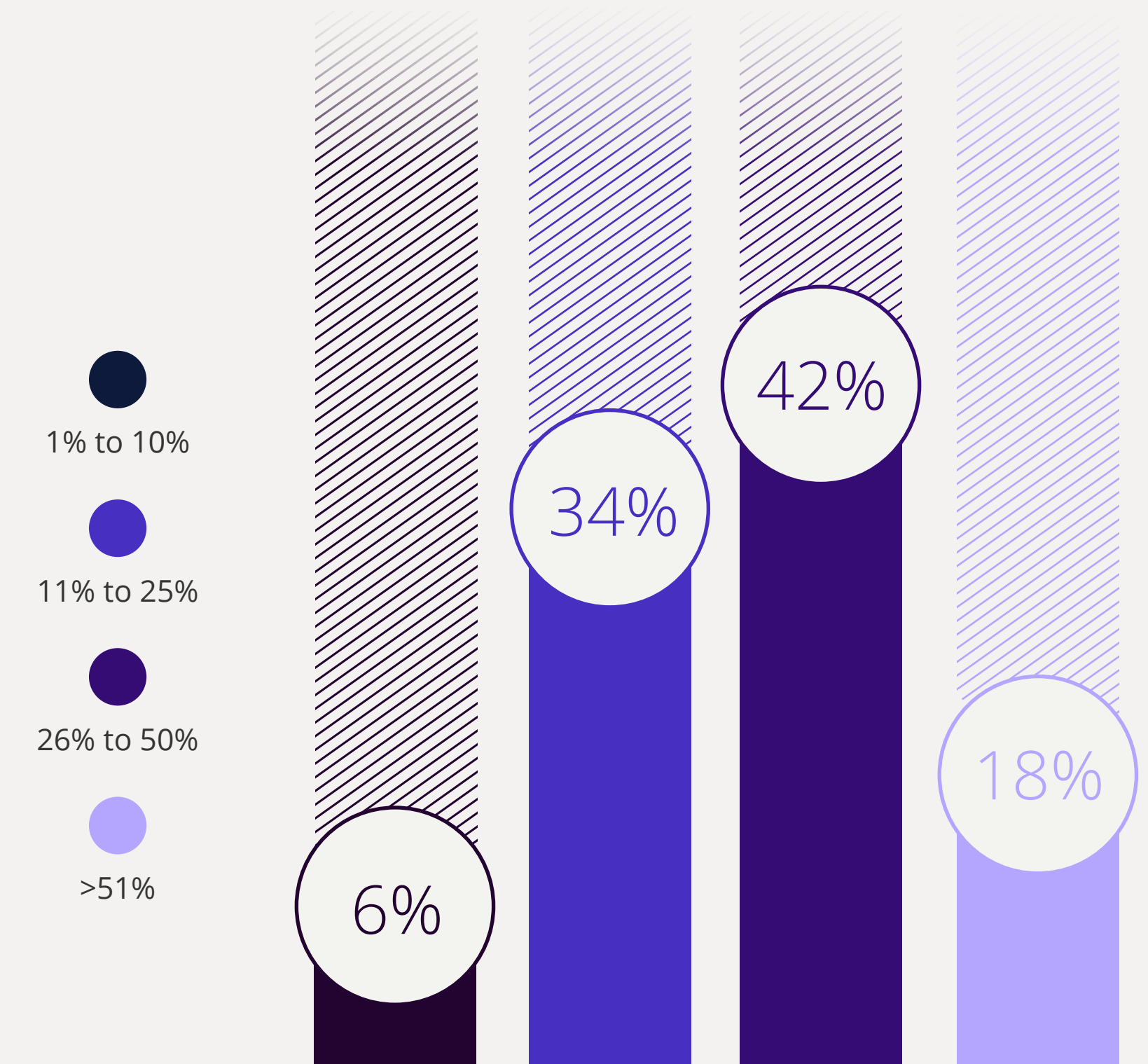
Takeaway

Implement ongoing cost controls and monitoring as a standard business practice, don't treat optimization as a one-time project. Establish regular financial reviews and governance processes to adapt to changing cloud costs and usage patterns.

Cloud Services Consume IT Budgets

Most IT Decision Makers allocate approximately 26% to 50% (42%) or 11% to 25% (34%) of their IT budget to cloud services. Some mentioned an allocation of above 51% (18%), while a few allocated between 1% to 10% (6%).

IT Decision Makers from smaller organizations (with 101 to 500 employees) were more likely to allocate only 11% to 25% of their IT budget to cloud services (40%).

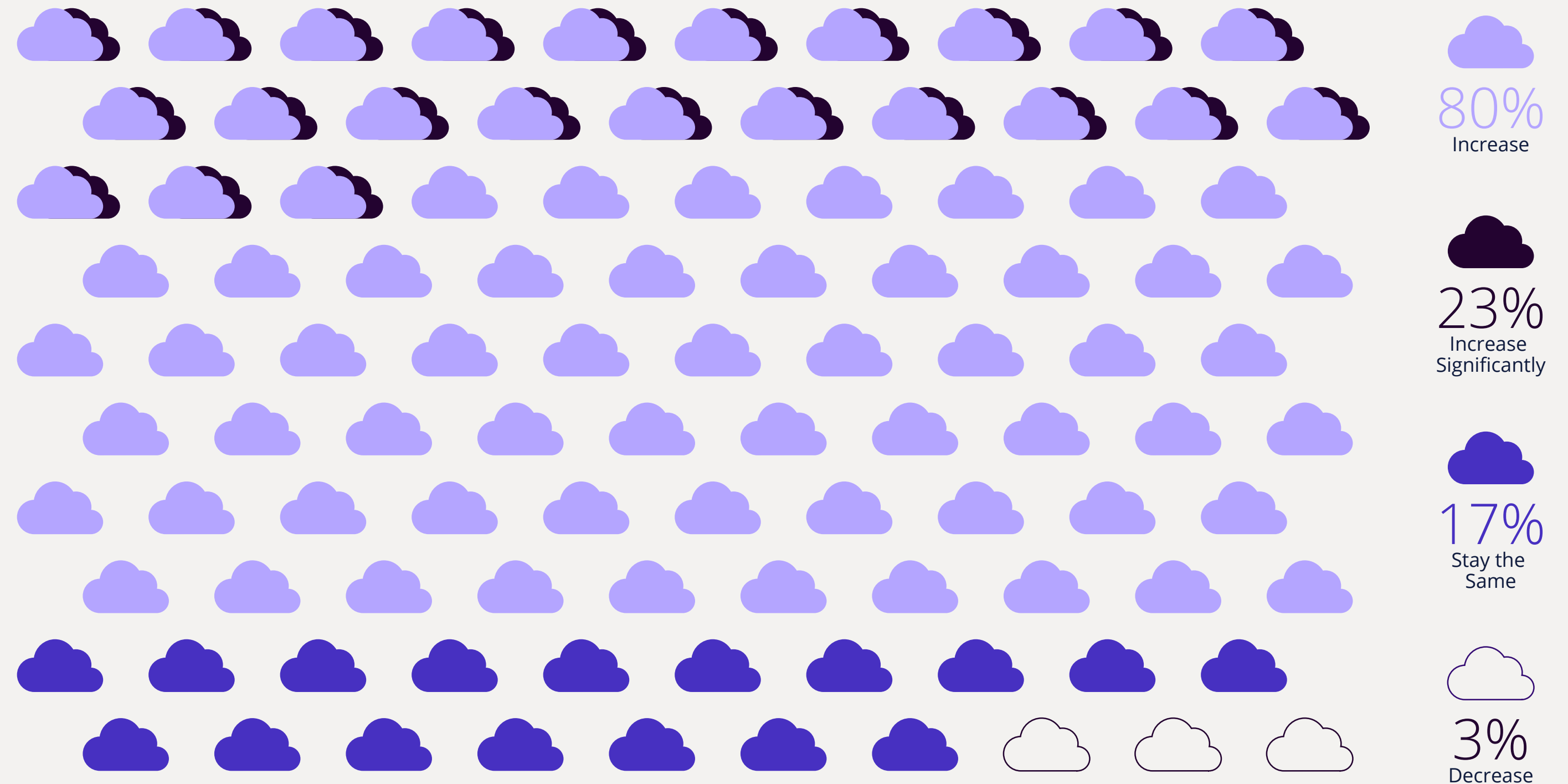


“In recent years, it’s clear that the initial enthusiasm for an all-in cloud approach has evolved into a more strategic, nuanced perspective. Trends like repatriation and troubled cost predictability have changed how customers manage their workloads.

Our customers are now making more deliberate, data-driven decisions about their infrastructure, seeking the optimal balance between on-premises control and cloud flexibility to meet complex operational demands. This shift away from “cloud at any cost” to a hybrid-model reflects a maturing market and a deeper understanding of technology as a strategic business enabler.”

Sandip Channa

Chief Technology Officer, CSI Group
Tectrade



IT Budgets Shifting More to Cloud

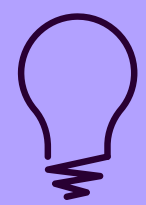
Further, 4 in 5 IT Decision Makers expect the amount of their IT budget allocated to cloud services to increase in the next 3 to 5 years (80%), including more than 1 in 5 who expect it to increase significantly (23%). Some expect it to stay the same (17%) while only a few expect it to decrease (3%).



3. The Risk Barrier – Security and Resilience

Security remains the top concern for IT leaders, as well as the greatest source of uncertainty. Cloud security, continuous monitoring, and identity management are considered essential through 2030, but vulnerabilities persist. Hybrid environments can challenge visibility, security teams are stretched thin, and ransomware remains a top board-level risk. These pressures make it clear that security is no longer a standalone discipline; it is inseparable from overall operational resilience.

This connection becomes even clearer when looking at disaster recovery. More than 80% of IT leaders express confidence in their DR strategy, yet the reality is more nuanced. Recovery plans are not always tested end-to-end, security expertise varies across teams, and true resilience often hinges on external partners. Many organizations overestimate their readiness because their plans exist on paper but have not been validated against modern threats, especially those that begin as security incidents. As a result, CIOs are elevating resilience as a unified priority, integrating security, disaster recovery, and business continuity into a single strategy.



Takeaway

Regularly test recovery and response plans with real scenarios, and ensure visibility into systems and partnerships is strong. Documented plans alone do not guarantee resilience. Build trusted relationships with external partners and maintain transparent reporting to move beyond confidence and achieve readiness.

During conversations with IT and security leadership, I'm finding that one of the biggest roadblocks to modernizing IT systems is security and privacy concerns. Newer technologies like AI can introduce significant vulnerabilities and make compliance more difficult. The expanded attack surface, complex regulations, and the challenges of integrating new systems with older, legacy ones create substantial risk.

Additionally factors like interoperability issues, network complexity and the lack of in-house expertise play a part in the equation. Leaders are looking for solutions and knowledgeable partners that offer a more holistic view in terms of both structural and financial visibility across systems that will allow them to move forward more confidently.

Jo Peterson

Chief Information Officer
Clarify360



“Scalable protection is essential, especially as large, record-setting attacks dominate headlines while smaller threats quietly bypass detection. Cloud-only solutions often miss these low-volume events, which is why a hybrid model with on-prem visibility still plays a critical role. When investments are made in the right areas, organizations gain the coverage they need while reducing cost and complexity elsewhere.”

Carl Herberger
Chief Executive Officer
Corero Network Security



Cloud Security Dominates IT Security Agenda

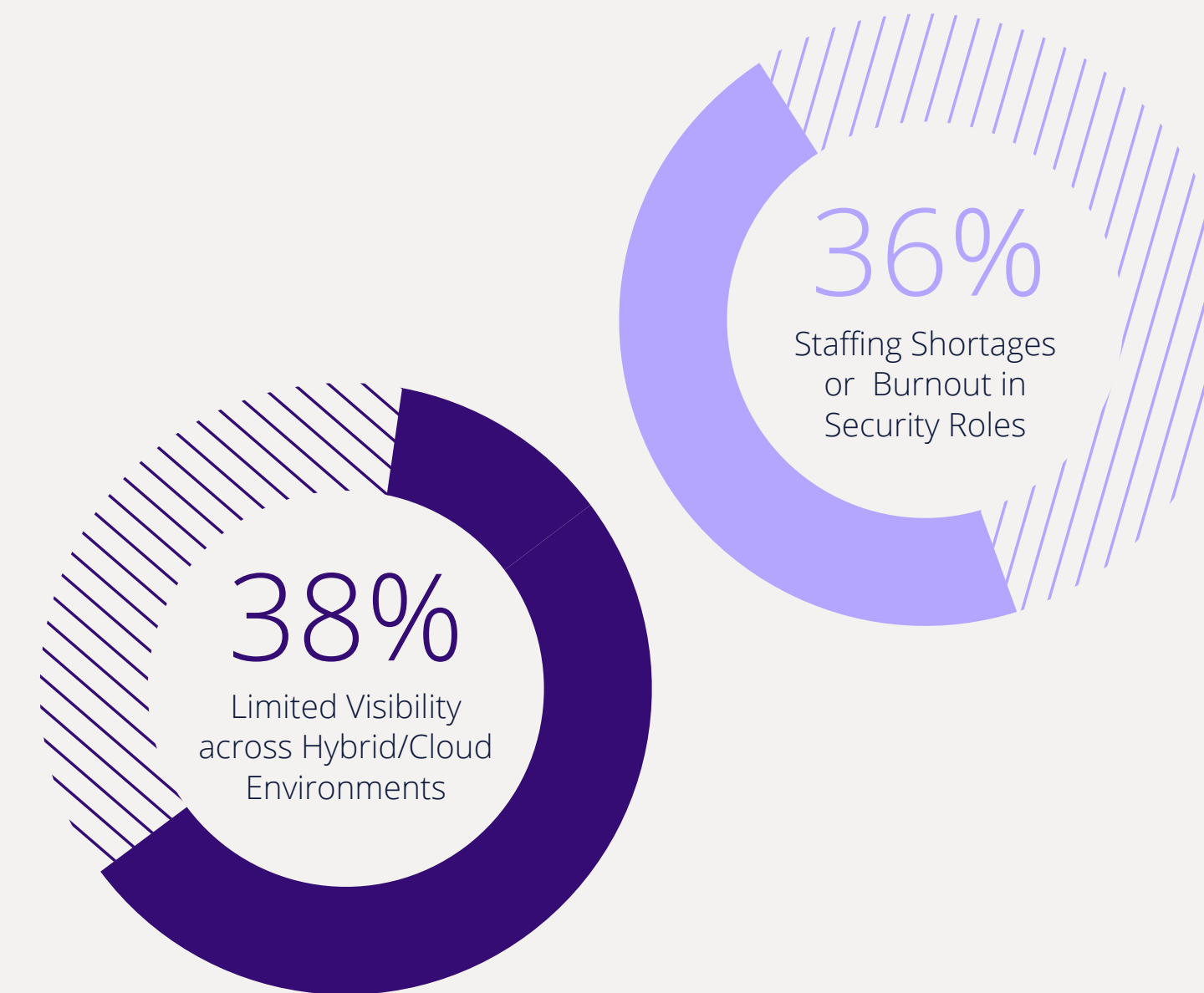
Cloud security was the most critical security priority for IT Decision Makers and their organizations through 2030 (49%), followed by employee training and awareness (43%), 24x7 monitoring and response (Security Operations Center) (40%), and identity and access management (40%).

IT Decision Makers from larger organizations (with 501 to 1,000 employees) were more likely to mention employee training and awareness as a critical security priority (48%).

Owners and C-Suite officials were more likely to mention ransomware protection as a critical security priority (41%).

Hybrid Cloud Visibility, Staffing Shortages Challenge Security

In terms of managing cybersecurity operations at their organization, IT Decision Makers cited limited visibility across hybrid/cloud environments (38%) and staffing shortages or burnout in security roles (36%) as the biggest challenges.



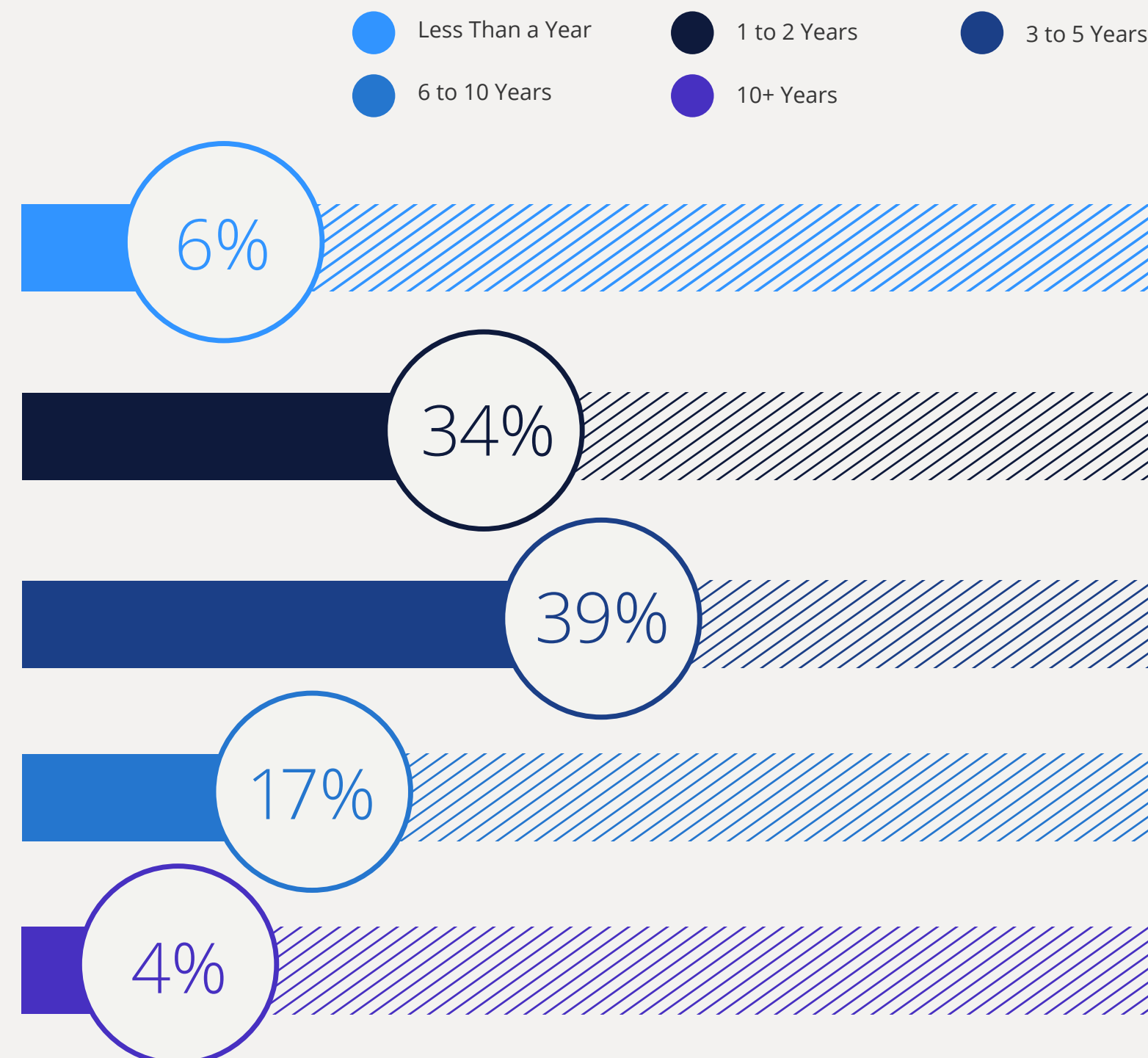
Planning Strategy

Modernization is fundamentally about the strength and clarity of planning. Technology choices matter, but how an organization plans is what sets it apart. In the mid-market, that planning is now a constant balancing act — staying nimble enough to pivot during disruption while also shaping a clear long-term vision for growth and resilience.

Most technology leaders operate with a one-to-five-year planning horizon. That window hits the sweet spot, aligning adaptability with strategic foresight. Still, two distinct shifts are emerging: some are intentionally shortening their horizon to maximize agility and rapid response, while others are extending their outlook for lasting growth and stability. There's no single right answer. The critical question: what forces are shaping approaches?

Most IT Decision Makers Plan 1 to 5 Years Ahead

Roughly 3 in 4 IT Decision Makers indicated their organization typically plans 1 to 2 years (34%) or 3 to 5 years (39%) in advance for strategic initiatives. Some plan 6 to 10 years (17%) or longer (4%), while only a few plan less than a year in advance (6%).



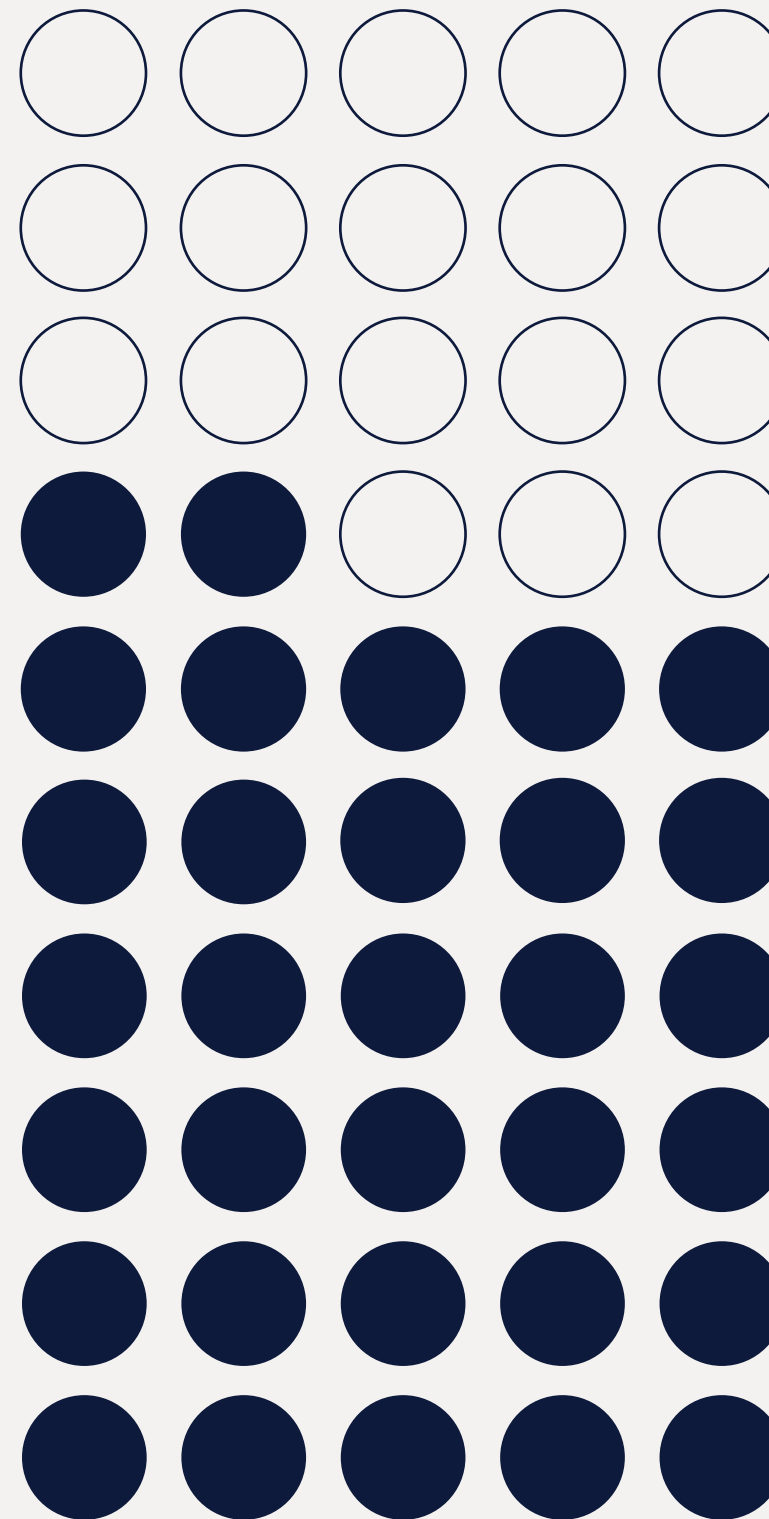
“The mid-market really is in a fascinating spot right now. AI and edge are driving the conversation, but it’s not just about chasing shiny new tech — it’s about how to modernize smartly, with real constraints around talent, cost, and security. What jumps out to me is that these leaders are thinking long-term again. They’re building five-year roadmaps, leaning on automation, and doubling down on upskilling to stay competitive. That mix of ambition and pragmatism is what’s going to separate the standouts from the strugglers heading into 2030.”

Evan Kirstel
B2B TechFluencer



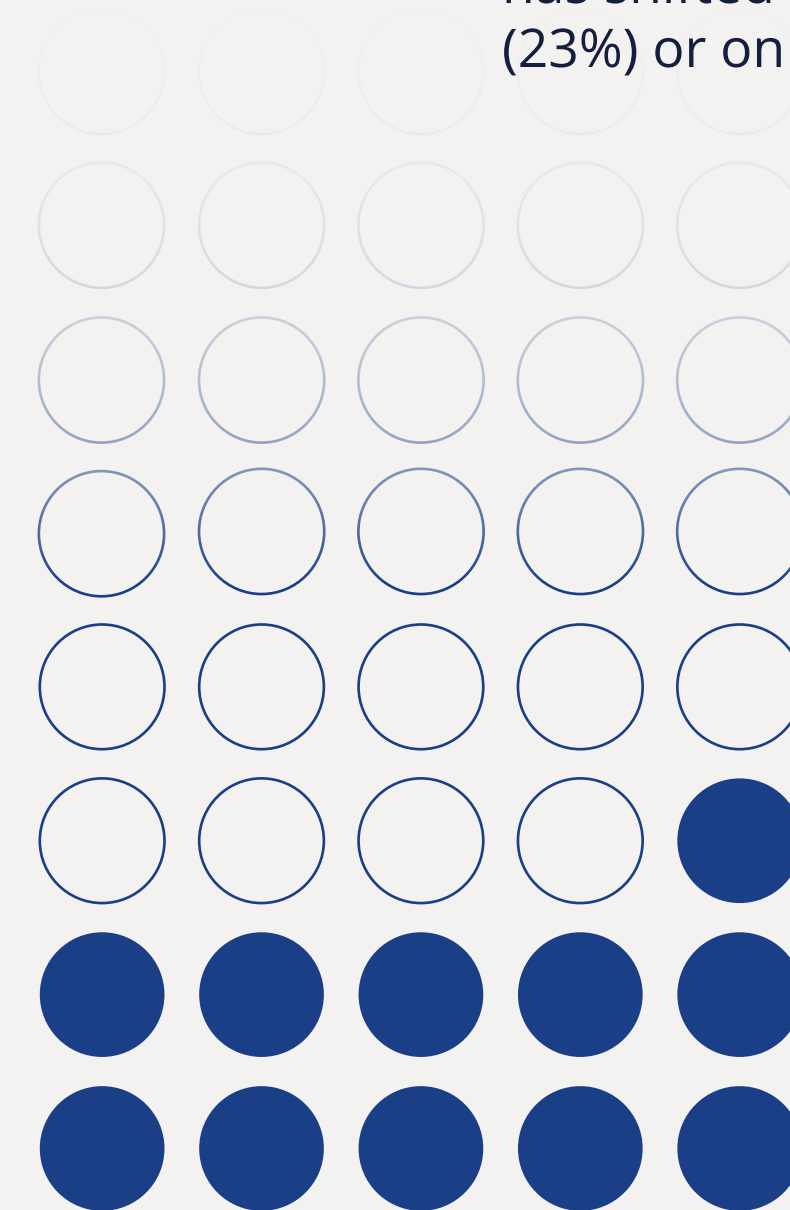
Organizations Maintain Strategic Planning Horizon

3 in 5 IT Decision Makers cited their organization's approach to strategic planning has maintained the same planning horizon in recent years (64%), while some said it has shifted to focus on planning further out (23%) or on shorter-term planning (13%).



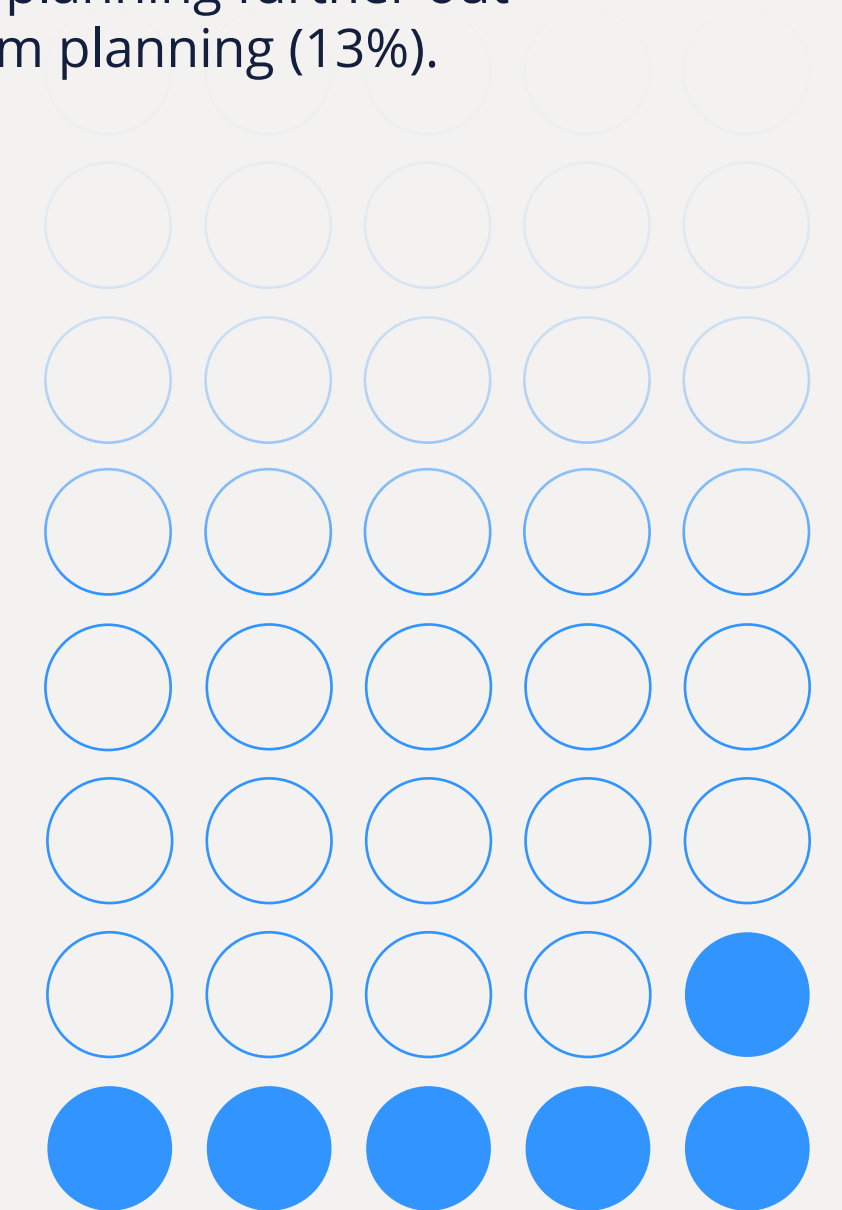
64%

Maintained the Same Planning



23%

Shifted to Focus on Planning Further Out



13%

Short-Term Planning

“Even with steady planning horizons, flexibility remains essential. Our role is helping IT teams commit to a clear roadmap, but also pivot intelligently as conditions evolve.”

Scott Kinka
Chief Strategy Officer
BridgePointe Technologies



Top Reasons for Short-Term Planning %

Agility and responsiveness in planning and strategy	50%
Market dynamics, opportunities, and trend observation	16%
Achieving business goals, overall success, and benefit focus	14%
Technology adoption, data analysis, and software/regulations	9%
Efficiency, quick results, and problem identification	6%
Revenue enhancement, profitability, and ROI	5%
Risk reduction, market stability, and loss minimization	5%
Cost reduction, implementation benefits, and ease of control	5%
Economic factors, asset enhancement, and financial planning	5%

Top Reasons for Planning Further Out %

Support growth and business development	56%
Market anticipation and adaptability	43%
Operational efficiency and effectiveness	27%
Increase competitiveness	18%
Other	3%

Short-Term Shift for Agility, Long-Term for Growth

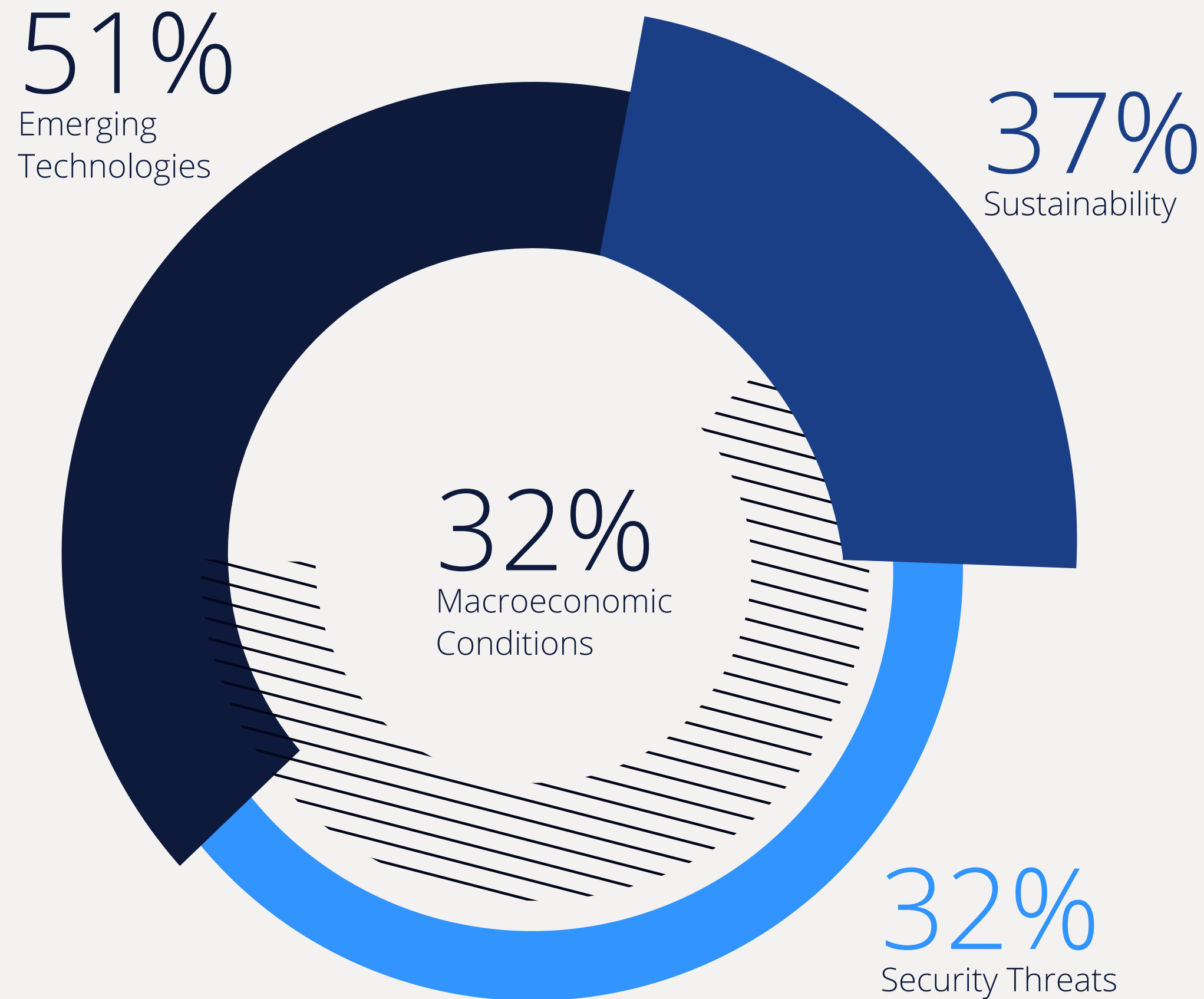
IT Decision Makers who indicated a shift towards short-term planning cited having more agility and responsiveness (50%) as the top reason for their organization's shift, while IT Decision Makers who have shifted towards planning further out expressed the need to support long-term growth and business development (56%).

(See the complete list of the coded reasons to the left)

Shorter-term Planning puts a premium on speed and responsiveness. CIOs focusing here want the ability to quickly react to market shifts, regulatory change, and new technology opportunities.

Longer-term Planning prioritizes sustained development and market leadership. This approach is about building foundational scale and anticipating future challenges before they arrive.

What's influencing these strategies? AI is front and center, but sustainability goals, security threats, and economic volatility remain strong drivers. Effective planning requires more than a tech roadmap, it's about preparing an organization for disruption in any form.



Emerging Tech and Sustainability Shape IT Planning Strategies

The most important factor influencing IT Decision Makers in their planning/strategy through 2030 is emerging technologies (AI, edge, etc.) (51%). Secondary factors include sustainability (37%), security threats (32%), and macroeconomic conditions/uncertainty (32%).

Owners and C-Suite officials were more likely to cite customer expectations as an important factor (41%).

“A decade ago, companies moved from managing their own infrastructure to partnering with service providers to simplify operations. Now, as IT leaders plan their security strategy, the same shift is unfolding in the security stack. With mounting privacy mandates and AI-driven threats, organizations need partners with the visibility and expertise to secure the whole ecosystem.”

Paul Mazucco
Chief Security Officer
TierPoint

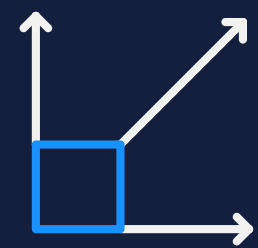


What This Means for CIOs



Balance Flexibility and Vision

Set ambitious goals for one to five years, but review and adjust plans quarterly to stay responsive to change.



Know the Key Driver

Clearly identify whether agility or growth is the main goal, and tailor planning approaches to fit that driver.



Plan for Disruption, Not Just Projects

Factor AI, sustainability, security, and volatility into every planning cycle, not just individual projects.



Make Planning Dynamic

Make planning an ongoing activity by revisiting and revising strategies in response to environmental shifts.



Anchor on Resilience

Design every plan to be resilient, ensuring it can handle shocks and setbacks while keeping transformation on track.



Conclusion

The future of IT in the mid-market is ambitious, pragmatic, and deeply human.

CIOs are investing in AI, automation, and modernization while balancing critical realities such as skill shortages, financial complexity, and persistent risk. Hybrid-by-design approaches signal a broader shift: technology leaders now seek the flexibility to optimize workloads while maintaining control over cost, compliance, and resilience.

This research highlights IT leaders in motion, revisiting cloud strategies, and embedding resilience into every decision. Success will favor those who align bold innovation with disciplined execution, ensuring people, processes, and technologies evolve together.

For mid-market organizations, the opportunity is unique. Absent the inertia of larger enterprises, these organizations can pivot faster, embrace modernization on their own terms, and lead the way in defining outcome-driven, resilient IT for the decade ahead.

The next five years will demand constant recalibration. CIOs must continually ask: Where is agility needed, and where is scale essential? The answers to these questions will determine whether modernization accelerates or stalls. The mid-market's advantage lies in speed, and that agility may well make these organizations the pacesetters of 2030.

“Technology transformation isn’t about chasing the next trend, it’s about building resilience that lasts. The most forward-looking CIOs are creating hybrid foundations that let them adapt as fast as their business changes. Cloud is part of that story, but the real power comes from the people and partners who help you use it wisely.”

Shashi Prabakhar

*Director, Solutions Architect
Amazon Web Services (AWS)*



Respondent Profile

All respondents indicated they worked full-time (100%) and influenced decisions or made purchases for their IT department (100%). All were the final decision-maker for the choice of IT provider(s) and solutions (80%), on the team that evaluates and selects provider(s) and solutions (15%), a key influencer on provider and solution decisions but not on the selection team (3%), or have some influence on decisions for provider(s) and solutions (2%).

All respondents indicated they were from the US, with most primarily working in California (17%), New York (8%), or Florida (7%).

Top Industries

Industry	%
Information Technology/ IT	19%
Banking/ Financial	12%
Manufacturing	11%
Retail/ Wholesale Trade	7%
Accounting	7%
Healthcare	7%



53%
\$50M-\$249M



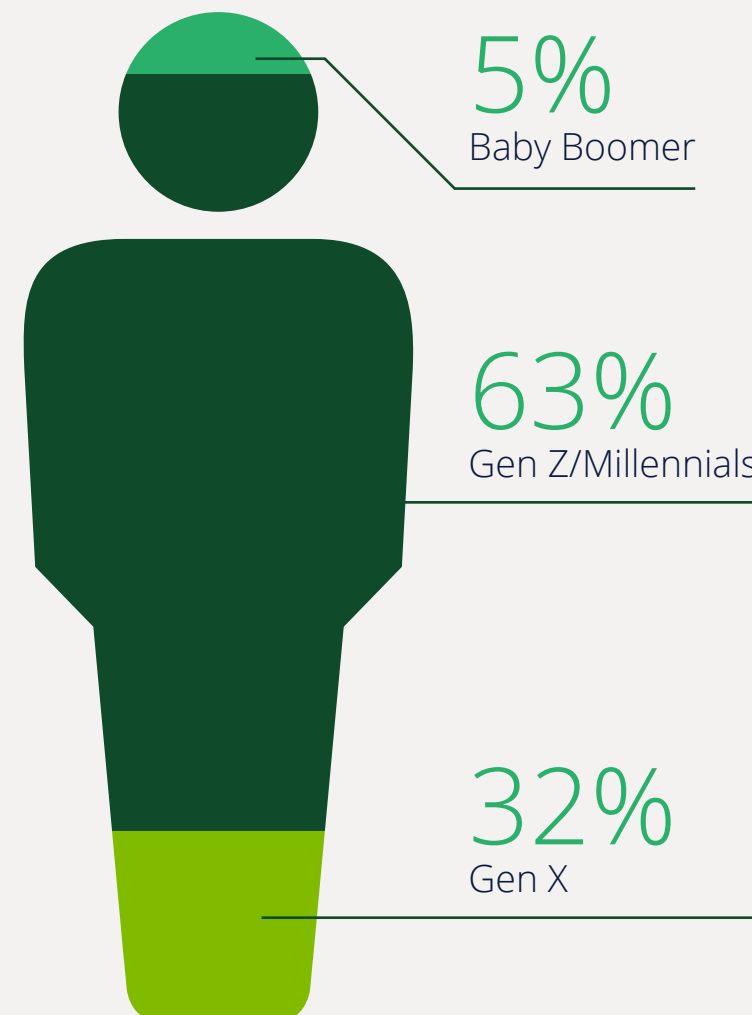
32%
\$250M-\$499M

Revenue

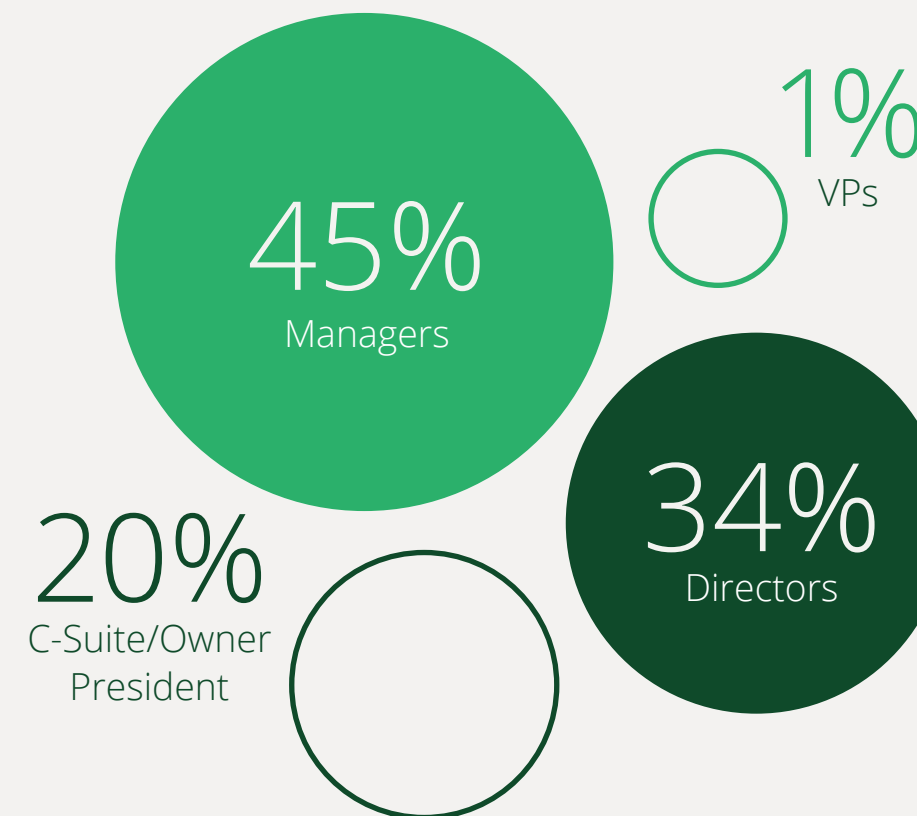


15%
\$500M-\$999M

Generation



Job Title



Number of Employees

