On the Radar: Amazon Web Services agentic AI solutions accelerate the global ambition of Chinese companies

市场追踪：亚马逊云科技代理式 AI 解决方案加速中国企业的全球化进程

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Omdia view
Omdia 观点

Summary

摘要

Gone are the days when China was a manufacturing hub with little value added. The technological savviness, commercial acumen, and innovation rate of Chinese enterprises have enabled them to launch unique and popular products and services, significantly altering customer perceptions. Today, many Chinese companies are becoming major global players. As these companies expand their international presence, they encounter varying market dynamics, regulatory frameworks, and operational requirements across regions. To maintain their competitive edge globally, Chinese enterprises are increasingly investing in advanced technologies, from cloud computing and data analytics to artificial intelligence (AI). Within this context of technological transformation, generative AI (GenAI) presents new possibilities for addressing challenges related to international expansion. Early adopters are exploring the integration of foundation model and agentic AI in functions such as sales and marketing, customer support, and supply chain operations to enhance market understanding, improve operational efficiency, and build differentiating advantages that support overseas expansion and sustained business growth.

中国已不再是昔日那个低附加值的制造中心。中国企业凭借技术敏锐性、商业洞察力和创新速度，推出了独具特色且广受欢迎的产品与服务，显著改变了客户的认知。如今，许多中国企业正成为全球市场的重要参与者。随着这些企业拓展国际业务，它们面临着各地区不同的市场动态、监管框架和运营要求。为保持全球竞争力，中国企业正持续加大从云计算、数据分析到人工智能（AI）等先进技术的投入。在这场技术变革中，生成式 AI（GenAI）为应对国际化扩张的挑战带来了全新可能。早期采用者正在探索将基础模型和代理式 AI（Agentic AI）整合到销售与营销、客户支持和供应链运营等职能中，以深化市场理解、提升运营效率并构建差异化优势，从而支持海外扩张和可持续的业务增长。

Omdia view   Omdia 观点

In recent years, China has become a global economic powerhouse. Its export-oriented economy and strong domestic consumption have enabled many Chinese enterprises to develop products and services that rival those of their overseas counterparts. After experiencing strong success in the domestic market, Chinese enterprises have begun to look to overseas markets to achieve greater growth.

近年来，中国已成为全球经济强国。其出口导向型经济和强劲的内需使众多中国企业开发出比肩国际同行的产品与服务。在国内市场取得巨大成功后，中国企业开始将目光投向海外市场以谋求更大发展。

Traditionally, Chinese enterprises' strengths have been in tangible products, such as clothing, furniture, and home appliances. But in recent years, both their high tech hardware and their digital products and services have experienced a rapid surge in popularity worldwide. The former includes

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electric vehicles, lithium-ion batteries, and photovoltaic equipment, while the latter encompasses social media platforms and e-commerce services.

传统上，中国企业的优势集中在服装、家具、家电等实体产品领域。但近年来，中国的高科技硬件和数字产品与服务也在迅速风靡全球——前者包括电动汽车、锂离子电池和光伏设备，后者则涵盖社交媒体平台和电子商务服务。

As their range of products and services becomes more diverse and reaches a broader set of global destinations, Chinese enterprises face increased complexity in navigating worldwide expansion and operations. These companies need assistance in understanding local markets through in-depth research, identifying unique market positioning, and creating targeted and localized sales and marketing campaigns to maintain relevance, while also respecting cultural norms and complying with local regulations. They also need to optimize their supply chain and production processes to maintain a profitable and sustainable business operation.

随着产品服务组合日趋多元化并进军更广阔的国际市场，中国企业在全球业务拓展与运营中面临的复杂性正与日俱增。这些企业亟需获得以下支持：通过深度市场洞察精准把握本地需求，确立独特市场定位，开展针对性本土化营销以保持市场竞争力，同时兼顾文化适应性与合规经营。此外，它们还需通过优化供应链与生产流程，确保盈利能力和业务的可持续性。

Omdia observes that forward-looking enterprises looking to better navigate these challenges have begun to explore the use of GenAI as a complement to their global expansion strategies. Early adoption is starting to emerge in areas such as market research, customer experience improvement, digital marketing localization, and supply chain optimization. Furthermore, many enterprises are trialing or testing agentic AI capability, introducing software systems with a high degree of autonomy to accelerate the transformation.

Omdia 观察到，前瞻性企业为更好地应对这些挑战，已开始探索将 GenAI 作为全球化战略的补充工具。早期应用主要集中在市场研究、客户体验优化、数字营销本土化和供应链优化等领域。此外，许多企业正在试点或测试代理式 AI 能力，通过引入具有高度自主性的软件系统来加速转型进程。

However, keeping up with all these innovations is challenging. Agentic AI introduces additional complexity around software integration, model training and fine-tuning, data security, and in many other areas. As such, companies are seeking partners that can provide not only leading technical capabilities but also a proven track record of supporting other Chinese enterprises in their global expansion plans.

然而，持续跟进所有这些创新并非易事。代理式 AI 在软件集成、模型训练与微调、数据安全等诸多领域带来了额外的复杂性。因此，企业正在寻找既能提供领先的技术能力，又具备助力其它中国企业全球化扩张成功经验的合作伙伴。

Why put Amazon Web Services on your radar?
为什么关注亚马逊云科技？

Amazon Web Services is well-positioned to help Chinese companies address the above challenges. As a global cloud service provider with a strong regional presence, Amazon Web Services has extensive experience navigating diverse markets. Technologically, the company boasts some of the most comprehensive and reliable public cloud GenAI infrastructure and services. It ranks highly in various Omdia cloud and GenAI market assessments. Over the past year, the company has invested

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heavily in agentic AI capabilities and services with enterprise-grade security and compliance. The company offers specific solutions targeting clients from various verticals and has a proven track record of serving Chinese enterprises that go overseas by leveraging its global solution footprint and robust partner network support.

亚马逊云科技具备独特优势，可助力中国企业应对上述挑战。作为拥有强大区域布局的全球云服务提供商，亚马逊云科技在应对多元化市场方面拥有丰富经验。从技术层面看，该公司拥有业界最全面可靠的公有云 GenAI 基础设施及服务，并在 Omdia 多项云服务与 GenAI 市场评估中名列前茅。过去一年间，亚马逊云科技重点投资了具备企业级安全合规标准的代理式 AI 能力与服务，同时针对各垂直领域客户提供定制化解决方案。其通过全球化的解决方案布局和强大的合作伙伴网络，在服务出海中国企业方面拥有成熟经验。

Market context
市场背景

Chinese enterprises embarking on international expansion face significant hurdles and multifaceted challenges that require careful consideration and strategic planning. They must navigate a labyrinth of technical, operational, and regulatory requirements varying significantly from their domestic market. All these challenges make it crucial for enterprises to evaluate their deployment strategies and prioritize their investments in different markets.

中国企业进行国际化扩张时面临着重大障碍和多方面的挑战，需要审慎考虑和战略规划。这些企业必须应对技术部署、运营管理及合规监管等错综复杂的要求，这些要求与国内市场存在显著差异。所有挑战因素都使得企业必须仔细评估不同市场的部署策略，并合理规划资源投入优先级。

Challenges abound without proper support   缺乏专业支持将导致挑战倍增

The main challenge lies in a limited understanding of local markets and regional nuances. The primary reason behind the knowledge gap is differences in cultural background. At the same time, operating in different territories within a country's borders means there is a knowledge gap in regional business practices, consumer behaviors, and market dynamics. Without a deep grasp of these local contexts, Chinese companies often struggle to effectively customize their solutions and market positioning to meet specific market needs. For example, when Chinese fashion brands first expanded overseas, they were heavily reliant on local designers, since they were not confident about the preferences of the local market. Nowadays, most fashion enterprises can rely on GenAI to capture data-driven insights based on consumer data from overseas markets, and designers at the domestic headquarters can complete their work remotely.

企业面临的主要挑战在于对当地市场和区域差异的理解有限。这种认知差距的根本原因在于文化背景的差异。同时，在一国境内不同地区开展业务时，企业往往对区域商业惯例、消费者行为和市场动态缺乏了解。若不能深刻把握这些本土化背景，中国企业通常难以有效调整其解决方案和市场定位以满足特定市场需求。例如，中国时尚品牌最初向海外扩张时，因对海外市场偏好缺乏把握，高度依赖当地设计师。而如今，多数时尚企业可借助 GenAI，基于海外市场的消费者数据获取数据驱动的洞察，国内总部的设计师可远程完成工作。

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Additionally, overseas expansion costs can be prohibitive. Expenses related to infrastructure development, system integration, talent acquisition, and ongoing maintenance are often amplified in international markets due to higher labor costs, the need for specialized expertise, and the requirement for robust security measures. At the same time, investments must be rigorously monitored to ensure a high level of operational efficiency and productivity. All repetitive processes must be automated and operations optimized to keep pace with rapidly changing market requirements.

此外，海外扩张成本可能令人望而却步。由于劳动力成本较高、需要专业知识以及严格的安全合规要求，基础设施开发、系统集成、人才招募和持续维护等费用在海外市场往往大幅增加。同时，企业必须严格监控投资，以确保高水平的运营效率和生产力。所有重复性流程需实现自动化，并优化运营以快速适应多变的市场需求。

Lastly, Chinese enterprises may struggle to convert their ideas from proof-of-concept (POC) into mature and scalable products. Without a cost-effective digital infrastructure, the cost of experimentation and innovation is high. Businesses may have superior ideas, but the consequences of failure are too burdensome for them to attempt innovation. Additionally, enterprises must continually ensure that their new products and services comply with various regional regulations.

最后，中国企业可能难以将概念验证（POC）转化为成熟且可扩展的产品。若缺乏高性价比的数字基础设施，试错与创新成本将居高不下。企业或许拥有卓越的创意，但失败的代价过于沉重，使其难以尝试创新。此外，企业还需持续确保新产品和服务符合各地区不同的监管要求。

Agentic AI as a catalyst for innovation and overseas growth
代理式 AI：创新与海外增长的催化剂

GenAI can significantly change how Chinese enterprises operate in an overseas environment. Foundation models have demonstrated their ability to understand complex, multimodal data and transform it into actionable insights. However, foundation models require manual prompting and human operators, which can create additional friction and latency.

GenAI 能彻底改变中国企业的海外运营模式。基础模型已展现出解析复杂多模态数据并将其转化为可执行洞察的能力，但其依赖人工提示与操作员干预的特性可能造成额外的摩擦与延迟。

Taking advantage of the core capabilities of foundation models, agentic AI integrates foundation models with existing IT and operational technology (OT) systems to create a single agent or multi-agent system with a high degree of autonomy and self-agency in task execution and resolution. The emergence of agentic AI has revolutionized how organizations handle repetitive processes, introducing unprecedented levels of automation and efficiency. This automation capability extends beyond simple task execution to sophisticated decision-making processes, document processing, and quality control measures. By analyzing patterns and learning from historical data, agentic AI systems can execute complex tasks consistently and precisely, significantly reducing the likelihood of human error while ensuring compliance with established standards and regulations.

借助基础模型的核心能力，代理式 AI 通过融合基础模型与现有 IT 和 OT（运营技术）系统，构建出具有高度自主性和自我执行任务与解决问题能力的单智能体或多智能体体系。代理式 AI 的出现重塑了企业处理重复性流程的方式，带来前所未有的自动化水平与效率提升。这种自动化能力不仅限于简单的任务执行，更延伸至复杂的决策制定流程、文档处理和质量控制措施。通过分析模式并从历史数据中学习，代理式 AI 系统能持续、精准地完成复杂任务，在显著降低人为错误的同时，确保符合既定标准与监管要求。

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Forward-looking enterprises are currently deploying agentic AI in various areas:

前瞻性企业目前正在多个领域部署代理式 AI：

- In customer service, Chinese enterprises can deploy intelligent chatbots and virtual assistants that offer 24/7 support, handle inquiries, and resolve issues promptly in local languages.

  在客户服务方面，中国企业可部署智能聊天机器人和虚拟助手，提供全天候支持，以本地语言处理咨询并快速解决问题。

- Agentic AI can assist the local sales and marketing team in crafting personalized campaign generation and intelligent lead-scoring systems. Through the analysis of local market data, such as social media postings, primary customer surveys, and supply chain information, Chinese enterprises can quickly build a solid understanding of regional trends and preferences.

  在销售与营销方面，代理式 AI 可协助本土团队实现个性化营销活动生成与智能化的潜在客户评分系统。通过分析本地市场数据（如社交媒体动态、客户一手调研及供应链信息），中国企业能快速掌握区域市场趋势与消费者偏好。

- Equipped with knowledge of existing designs and fresh technological breakthroughs, AI agents can generate new design ideas and frameworks that best suit the user requirements and intended applications, enabling product designers, engineers, system architects, and business managers to innovate more quickly.

  在掌握现有设计知识和最新技术突破的基础上，智能体能够生成最符合用户需求和应用场景的全新设计理念与框架，帮助产品设计师、工程师、系统架构师和业务经理加速创新。

- Software development has also been greatly accelerated by coding agents that can understand natural language instructions, learn from existing codebases, and perform ultra-fast code generation, code testing and review, and bug detection, automating the entire software engineering lifecycle.

  软件开发领域也因编码智能体的出现而大幅提速，这些智能体能够理解自然语言指令、从现有代码库中学习，并实现超高速的代码生成、测试与评审以及错误检测，从而自动化整个软件工程生命周期。

When paired with cloud technology, the cost of experimentation can be significantly reduced, allowing enterprises to be nimbler in finding the optimal solution that addresses local requirements.

与云技术结合后，实验成本可大幅降低，使企业能更灵活地找到满足本地需求的最佳解决方案。

Moreover, foundation models and AI agents can be tailored to specific industry needs and specialized use cases. For example, multimodal content generation capabilities are highly critical in e-commerce, since they enable the creation of personalized product descriptions, recommendations, and promotional videos, as well as supporting features such as beautification and real-time translation during live streaming commerce. In manufacturing, autonomous quality inspection and assurance systems can detect defects and predict failures with unprecedented accuracy. The gaming industry leverages coding agents to create dynamic content, generate realistic environments and conversations, and develop engaging player experiences. In pharmaceuticals, agentic AI helps researchers to discover new drugs and formulate personalized treatment regimes.

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此外，基础模型和智能体可根据特定行业需求与专业场景进行定制。例如，在电子商务领域，多模态内容生成能力至关重要，它能创建个性化产品描述、推荐和促销视频，同时支持直播电商中的美颜优化和实时翻译等功能。制造业则通过自主质量检测与保障系统，以前所未有的精度识别缺陷并预测故障。游戏产业利用编程智能体创造动态内容，生成逼真的环境与对话，打造沉浸式玩家体验。而在医药行业，代理式 AI 可协助研究人员加速新药研发并制定个性化治疗方案。

Methodical approach to agentic AI investment unlocks new potential
系统性布局代理式 AI 投资，开启全新增长潜能

While many Chinese enterprises appreciate the capabilities of agentic AI, others lack the proper foundation. Robust data foundation, a critical prerequisite, is often absent. Without properly structured data architectures, comprehensive data governance frameworks, and efficient data management systems, enterprises struggle to derive meaningful insights and value from their AI investments. Chinese enterprises must also adapt their approaches to align with diverse regional data protection regulations and AI sovereignty requirements.

尽管许多中国企业已认识到代理式 AI 的价值，但部分企业仍缺乏必要基础。作为关键前提的健全数据基础往往尚未建立。若缺乏合理的数据架构、完善的数据治理框架和高效的数据管理系统，企业将难以从 AI 投资中获取有效洞察与价值。中国企业还需调整策略，以适应各地区不同的数据保护法规和 AI 主权要求。

Enterprises also need to implement various security measures to harden their agentic AI systems and safeguard against all malicious activities. They can introduce firewalls to limit vulnerable points of attack, such as data engineering and prompt inputs. Model outputs must be placed within guardrails. When possible, models in agentic AI systems need to show a transparent reasoning and decision-making process.

企业还需实施多重安全措施，强化代理式 AI 系统，防范恶意行为。例如，可通过部署防火墙来减少数据工程和提示输入等易受攻击环节的风险，并为模型输出设置防护机制。在可行情况下，代理式 AI 系统中的模型应保持推理与决策过程的透明性。

Additionally, successful agentic AI implementation demands strong expertise in both IT and OT domains—a combination that many Chinese enterprises find challenging to develop or acquire, especially in overseas markets where talent pools with such specialized knowledge may be limited.

此外，成功部署代理式 AI 需要兼备 IT 与 OT 领域的深厚专业知识——这种复合型能力对许多中国企业而言颇具挑战，在海外市场尤其如此，因为同时具备这两类专长的人才储备往往较为有限。

Product/service overview
产品/服务概览

Amazon Web Services offers a broad and integrated portfolio of agentic AI solutions designed to help its customers unlock innovation and scale agentic AI across their organizations. For Chinese companies seeking to go global, Amazon Web Services provides a comprehensive technology stack, including foundational models, developer tools, scalable infrastructure, ready-to-use applications,

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and expert guidance. This enables them to build, deploy, and operate agentic AI tools and applications with a high degree of autonomy and efficiency.

亚马逊云科技提供一套全面且集成的代理式 AI 解决方案组合，旨在帮助客户实现创新，并在全组织范围内规模化部署代理式 AI。对于寻求全球化的中国企业，亚马逊云科技提供包括基础模型、开发者工具、可扩展基础设施、即用型应用和专家指导在内的完整技术栈，使其能够高效自主地构建、部署和运营代理式 AI 工具与应用。

Agentic AI application layer

代理式 AI 应用层

At the application layer, Amazon Web Services solutions seek to serve professionals who are looking to deploy agentic AI with minimal technical overhead. Customers currently have three options:

在应用层，亚马逊云科技的解决方案旨在服务那些希望以最小技术开销部署代理式 AI 的专业人士。目前客户可选择以下三种方案：

- Applications powered by Amazon Q: Amazon Q Business helps business users get insights and automate workflows, while Amazon Q Developer is a coding assistant that provides real-time code suggestions, command-line interactions, and code problem fixing.

  基于 Amazon Q 的应用：Amazon Q 企业版可帮助企业用户获取洞察并实现工作流程自动化，而 Amazon Q 开发者版则是一款编程助手，能够提供实时代码建议、命令行交互和代码问题修复功能。

- AI agent for enterprise modernization: Amazon Transform is an agentic AI service developed to accelerate the modernization of .NET, mainframe, and VMware workloads. It accelerates enterprise IT infrastructure modernization by automating complex tasks, such as assessments, code analysis, refactoring, decomposition, dependency mapping, validation, and transformation planning.

  企业现代化智能体：Amazon Transform 是一款专为加速.NET、大型机和 VMware 工作负载现代化而开发的代理式 AI 服务。它通过自动执行复杂任务，例如评估、代码分析、重构、分解、依赖关系映射、验证和转型规划，加速企业 IT 基础设施的现代化进程。

- Spec-specific development: Amazon Web Services offers Kiro to customers who want to create applications based on high level prompts. Kiro can autonomously generate working code, technical documentation, and tests.

  规范驱动开发：亚马逊云科技的 Kiro 服务面向希望基于宏观提示创建应用程序的客户。Kiro 能够自主生成可运行代码、技术文档和测试用例。

Customers looking for third-party tools can also rely on Amazon Web Services Marketplace to identify the right solutions for their use cases. The new API-based deployment method helps streamline integrations with other agents and tools that support the Model Context Protocol (MCP) and Agent2Agent protocol (A2A). The pre-built agents can run on trusted services provided by Amazon Web Services or in an Amazon Web Services environment.

寻求第三方工具的客户也可以通过亚马逊云科技 Marketplace 找到适合其使用场景的解决方案。基于 API 的新型部署方法可简化与支持模型上下文协议(MCP)和 Agent2Agent 协议(A2A)的其它智能体

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及工具的集成。这些预构建的智能体能够在可信的亚马逊云科技云服务或亚马逊云科技环境中运行。

Building custom agentic AI solutions

构建定制化代理式 AI 解决方案

Amazon Bedrock is a fully managed service that sits at the heart of the company's AI stack. It is a serverless offering that provides quick access to production-ready models with no infrastructure hassle. Amazon Bedrock provides access to leading foundation models and the tools needed to build production-ready applications. For organizations with existing AI investments, the custom model import capability lets customers bring their proprietary models into Bedrock while maintaining strong security controls.

Amazon Bedrock 是一项全托管服务，作为亚马逊 AI 技术栈的核心组件。该无服务器方案能够快速提供生产就绪的模型，无需担心基础设施管理问题。通过 Amazon Bedrock，用户可获取领先的基础模型及构建生产级应用所需的工具。对于已有 AI 投资的企业，其自定义模型导入功能支持客户在保持严格安全控制的前提下，将专有模型集成至 Bedrock 平台。

For the development teams building custom AI agents, Amazon Bedrock also includes AgentCore, a set of services to deploy and operate agents securely at scale. AgentCore services are composable and work with popular open source frameworks and any model.

针对开发定制化智能体的团队，Amazon Bedrock 还包含 AgentCore——一套用于安全大规模部署和运行智能体的服务集合。AgentCore 服务采用可组合架构，能够与主流开源框架及各类模型协同工作。

At the same time, Amazon Web Services also offers Strands Agents, an open source Python software development kit (SDK) for building agents using just a few lines of code. The tool is designed to be simple to use and eliminates the need for complex agent orchestration by leveraging the capabilities of state-of-the-art models to plan, chain thoughts, call tools, and reflect. Through native services integration of Amazon Web Services, observability, and powerful built-in tools, customers can innovate faster while maintaining control and flexibility.

与此同时，亚马逊云科技还推出了 Strands Agents——一个开源的 Python 软件开发工具包(SDK)，仅需几行代码即可构建智能体。该工具设计简洁易用，通过利用最先进模型的规划、思维链、工具调用和反思能力，消除了复杂智能体编排的需求。借助原生亚马逊云科技服务集成、可观测性和强大的内置工具，客户能够在保持控制力和灵活性的同时加速创新。

For customers seeking complete control over model training and customization, Amazon Web Services provides the necessary infrastructure through Amazon SageMaker AI, meeting the needs of data scientists and machine learning (ML) engineers. Amazon SageMaker AI provides customers with a managed environment for building, fine-tuning, evaluating, and deploying foundation models. With MLOps integration, customers can reduce training time, streamline experimentation, and manage agentic AI projects from end to end.

针对需要完全掌控模型训练与定制流程的客户，亚马逊云科技通过 Amazon SageMaker AI 提供必要的基础设施，满足数据科学家和机器学习(ML)工程师的需求。Amazon SageMaker AI 为客户提供管理式环境，支持基础模型的构建、精调、评估和部署全流程。通过集成 MLOps 能力，客户能够有效缩短训练周期、优化实验流程并实现代理式 AI 项目的端到端全生命周期管理。

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Meanwhile, Amazon Web Services continues to demonstrate its dedication to an open ecosystem by supporting multiple protocols that enable inter-agent communication, including the MCP, open-sourced by Anthropic in 2024, and the A2A protocol, introduced by Google this year.

与此同时，亚马逊云科技持续践行开放生态承诺，支持多种智能体间通信协议，包括 Anthropic 公司于 2024 年开源的 MCP 协议，以及谷歌今年最新推出的 A2A 协议。

Agentic AI infrastructure 代理式 AI 基础设施

Amazon Web Services' purpose-built infrastructure for agentic AI is designed to deliver high performance, cost efficiency, and enterprise-grade security. Amazon Web Services offers a flexible range of computing options to support everything from model training and fine-tuning to low-latency inference. The company collaborates with NVIDIA, Intel, Qualcomm, AMD, and others to offer customers a broad selection of AI accelerators while continuously innovating its in-house chip roadmap to deliver improved price-performance over time. Amazon Trainium helps reduce the cost and time of model training, while Amazon Inferentia enables high-throughput inference at a lower price.

亚马逊云科技专为代理式 AI 构建的基础设施旨在提供高性能、成本效益和企业级安全性。亚马逊云科技提供灵活的计算选项，支持从模型训练、微调到低时延推理的全流程需求。该公司与英伟达、英特尔、高通、AMD 等厂商合作，为客户提供多样化的 AI 加速器选择，同时持续创新自研芯片路线图以不断提升性价比。Amazon Trainium 有助于降低模型训练成本和时间，而 Amazon Inferentia 则以更低价格实现高吞吐量推理。

More importantly, all Amazon Web Services instances are powered by the Amazon Nitro System, which provides hardware-level isolation, security, and performance. This architecture protects proprietary data and intellectual property. Amazon Web Services infrastructure is available globally, enabling customers to maintain consistent performance and meet regional compliance requirements as they scale internationally.

更重要的是，所有亚马逊云科技实例均由 Amazon Nitro System 提供支持，该系统提供硬件级隔离、安全性和性能保障。这种架构能有效保护专有数据和知识产权。亚马逊云科技基础设施全球可用，使客户在向国际扩展时能够保持一致的性能表现并满足区域合规要求。

Agentic AI governance, safety, security, and compliance 代理式 AI 治理、安全性与合规性

Amazon Web Services builds security and compliance into every aspect of the service. It does not store customer inference or training data. This means it cannot leak, cannot be seen by model vendors, and cannot be used by Amazon Web Services for any other purpose. All customer APIs and model data, including prompts, responses, and fine-tuned models, are isolated per customer and remain in the Amazon Web Services Region. All communications to, from, and within Amazon Bedrock are encrypted in transit and require a minimum of Transport Layer Security (TLS) 1.2 for API connections. Customization training data and models in S3 can be encrypted with the customer's own Key Management Service (KMS) keys. Bedrock has achieved numerous compliance certifications, including a Federal Risk and Authorization Management Program (FedRAMP) authorization of Moderate/High, a Health Insurance Portability and Accountability Act Business Associate Agreement (HIPAA BAA), an International Organization for Standardization (ISO) certificate, and a Cloud Security

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Alliance Security, Trust, Assurance, and Risk (CSA STAR) Level 2 certification. It is also compliant with the General Data Protection Regulation (GDPR), making it suitable for a wide range of regulated industries.

亚马逊云科技将安全与合规性融入服务的每个环节。服务不会存储客户的推理或训练数据，这意味着数据既不会泄露，也不会被模型供应商查看，更不会被亚马逊云科技用于其它用途。所有客户 API 和模型数据（包括提示词、响应和微调模型）均按客户隔离，并始终保留在亚马逊云科技区域内。进出 Amazon Bedrock 及内部的所有通信均经过传输加密，API 连接至少需要传输层安全性 (TLS)1.2 协议。S3 中的定制训练数据和模型可使用客户自有的密钥管理服务 (KMS)密钥进行加密。Bedrock 已获得多项合规认证，包括联邦风险和授权管理计划 (FedRAMP)中/高级授权、《健康保险可携性和责任法案》商业伙伴协议(HIPAA BAA)、国际标准化组织 (ISO)认证以及云安全联盟安全、信任、保证和风险 (CSA STAR) 2 级认证。同时它还符合《通用数据保护条例 (GDPR)》要求，适用于各类受监管行业。

At the same time, Amazon Bedrock Guardrails is designed for agentic AI governance and safety. The solution is compatible with all foundation models and agents on Amazon Bedrock. Customers can configure thresholds to filter harmful content. Guardrails blocks up to 88% more unsafe content than native model protections, including multimodal toxicity and prompt attacks. Through natural language controls, customers can define topics to be avoided, aligning AI responses with your compliance standards. According to Amazon Web Services, its contextual grounding checks help reduce hallucinations by up to 75%. The upcoming Automated Reasoning checks are an industry-first capability that delivers very high verification accuracy, providing businesses with provable assurance in detecting AI hallucinations and identifying ambiguity. Finally, customers can also detect and filter personally identifiable information in both model inputs and responses. These capabilities reflect Amazon Web Services' commitment to safety, privacy, and security in AI applications.

与此同时，Amazon Bedrock Guardrails 专为代理式 AI 治理与安全设计。该解决方案兼容 Amazon Bedrock 上所有基础模型和智能体。客户可配置阈值来过滤有害内容，其拦截不安全内容的能力比原生模型防护高出 88%，包括多模态毒性内容和提示词攻击。通过自然语言控制，客户可定义需规避的话题，使 AI 响应符合合规标准。据亚马逊云科技称，其上下文基础检查可将幻觉减少高达 75%。即将推出的自动推理检查是业界首创功能，可提供极高的验证准确度，为企业检测 AI 幻觉和识别模糊性提供可验证的保证。最后，客户还能检测并过滤模型输入和响应中的个人身份信息。这些能力体现了亚马逊云科技在 AI 应用中对安全性、隐私和保护的承诺。

Culture of innovation and experimentation 创新与实验文化

As the leading cloud vendor in the market, Amazon Web Services understands the challenges of innovation. Many organizations like the idea of moving fast, but find it difficult to innovate within various internal constraints, such as legacy business, availability of skills, limited budget, and human resources. In response, the Amazon Web Services Generative AI Innovation Center team of strategists, data scientists, engineers, and solutions architects will work step-by-step with customers to build bespoke agentic AI solutions. Customers will work closely with technology experts from Amazon Web Services and the Amazon Web Services Partner Network to select the right models, define paths to navigate technical or business challenges, develop proofs of concept, and plan for launching solutions at scale. Amazon Web Services also enables its partners to collaborate and promote a culture of experimentation across various sectors. The company's robust global partner

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network can complement Amazon Web Services' capabilities and services. This is especially important for Chinese enterprises as they enter and operate in regional markets.

作为市场领先的云服务提供商，亚马逊云科技深刻理解创新面临的挑战。许多企业虽然认同快速行动的理念，但在实际创新过程中却受限于各种内部约束条件，包括传统业务负担、技术人才短缺、预算限制以及人力资源不足等问题。为此，亚马逊云科技生成式 AI 创新中心组建了由战略专家、数据科学家、工程师和解决方案架构师组成的专业团队，将逐步指导客户构建定制化的代理式 AI 解决方案。客户将与亚马逊云科技技术专家及亚马逊云科技合作伙伴网络成员紧密协作，共同完成模型选型、制定技术及业务挑战应对方案、开发概念验证，并规划规模化解决方案的落地。亚马逊云科技还积极推动合作伙伴之间的协作，推动跨行业实验文化的形成。该公司强大的全球合作伙伴网络能够有效补充亚马逊云科技自身的能力与服务，这对于中国企业开拓和运营区域市场尤为重要。

Company information
公司概况

Background
背景介绍

Amazon Web Services is a leading global cloud service provider. It has earned broad recognition among Chinese customers for its globally integrated infrastructure, extensive product and services portfolio, robust global community, comprehensive customer support, and enablement. For Chinese enterprises seeking to expand internationally, Amazon Web Services is often regarded as a strategic service provider, offering international capabilities and a trusted global brand to support their cloud demand.

亚马逊云科技是全球领先的云服务提供商。凭借其全球一体化的基础设施、丰富的产品与服务组合、强大的全球社区网络、全面的客户支持与赋能体系，亚马逊云科技在中国客户群体中赢得了广泛认可。对于寻求国际业务拓展的中国企业而言，亚马逊云科技凭借其国际化服务能力和值得信赖的全球品牌影响力，常被视为支持其云需求的重要战略服务提供商。

Current position
当前定位

Amazon Web Services launched a three-horizontal-one-vertical capability framework to support Chinese enterprises in unlocking the value of agentic AI and accelerating global expansion:

亚马逊云科技推出"三横一纵"能力框架，助力中国企业释放代理式 AI 价值并加速全球化布局：

- The first horizontal capability is global AI infrastructure, which enables agentic AI capabilities and provides end-to-end support from scenario identification and model selection to application development and user engagement.

  第一横是全球 AI 基础设施能力，赋能代理式 AI 技术实现，提供从场景识别、模型选择、应用构建再到用户触达的全流程支持。

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- The second horizontal capability is Amazon Web Services' professional security compliance framework and technical capabilities, which address the growing need for agentic AI security and governance. Amazon Web Services provides one-stop compliance solutions backed by a global team of security compliance experts with a deep understanding of regional and industry compliance standards. It has established rapid response mechanisms for emerging regulatory trends and compliance requirements.

第二横是亚马逊云科技专业的安全合规框架与技术能力，应对日益增长的代理式 AI 安全治理需求。亚马逊云科技配备深谙各地区各行业合规标准的全球安全合规专家团队，提供一站式合规解决方案，并针对最新监管动向和合规标准建立快速响应机制。

- The third horizontal involves the company's global partner network and Amazon's extensive global resources within its worldwide business. These provide powerful tools that enable overseas enterprises to accelerate integration into local industrial chains and effectively promote their products worldwide. Amazon Web Services collaborates with a network of experienced partners who bring deep industry knowledge and technical expertise to deliver tailored solutions. These partners help customers localize solutions, accelerate go-to-market execution, and deliver differentiated agentic AI experiences tailored to industry needs.

第三横涵盖亚马逊全球合作伙伴网络及全球业务资源，为出海企业提供在全球快速融入海外产业链、有效推广产品的利器。亚马逊云科技与具备深厚行业经验和技术专长的合作伙伴网络协同，共同提供定制化解决方案，帮助客户实现方案本地化，加速市场落地，并根据行业需求打造差异化的代理式 AI 体验。

- Finally, Amazon Web Services has developed solution roadmaps for key scenarios across multiple sectors to guide customers in quickly finding the optimal development paths. Amazon Web Services has created an Industry Solution Asset Library focused on seven key industries: automotive; life sciences and healthcare; media, entertainment, and advertising; retail and FMCG; gaming; manufacturing; and finance. It leverages cloud services and GenAI to help customers address challenges in specific application scenarios with global and local partners.

一纵是亚马逊云科技针对各行业关键场景打造解决方案路线图，指导客户快速找到最优发展路径。亚马逊云科技已建立聚焦七大重点行业的行业解决方案资产库，涵盖汽车、生命科学与大健康、媒体娱乐与广告、零售快消、游戏、制造以及金融行业，运用云服务和 GenAI 技术，携手全球及本地合作伙伴帮助客户应对具体应用场景中的挑战。

Future plans

未来计划

Amazon Web Services aims to capitalize on the growing demand for sophisticated AI tools and cloud infrastructure by further refining its offering to align with the evolving needs of Chinese customers seeking global expansion. From productivity enhancement with specialized pre-built products and workflow orchestration using fully managed Amazon Bedrock Agents, to custom solution creation with the open source Strands Agents SDK, Amazon Web Services gives customers the freedom to invent with AI agents in whatever way best suits their needs. Drawing on its extensive experience in supporting organizations across various industries, scales, and types, Amazon Web Services can

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effectively scale proven solutions and best practices across similar use cases and geographical regions. The company has more than 240 full-featured cloud services and infrastructure covering 245 countries and territories worldwide. By leveraging its global presence and deep understanding of both Chinese and international markets, Amazon Web Services can facilitate seamless cross-border operations while ensuring compliance with local regulations and technical standards. This positions Amazon Web Services as an ideal partner for Chinese enterprises seeking to establish and expand their digital presence globally while driving innovation and operational efficiency through agentic AI solutions.

亚马逊云科技将把握市场对先进 AI 工具和云基础设施日益增长的需求，持续完善服务体系以契合寻求全球化发展的中国客户需求的演进。从采用预构建专业产品提升生产力、通过全托管的 Amazon Bedrock Agents 实现工作流编排，到使用开源的 Strands Agents SDK 创建定制解决方案，亚马逊云科技为客户提供了自由创新的智能体构建能力。凭借服务多行业、多规模、多类型组织的丰富经验，亚马逊云科技能将成熟解决方案和最佳实践有效复用于相似用例和地理区域。该公司在全球 245 个国家和地区部署了 240 多项功能齐全的云服务和基础设施，依托全球化布局及对海内外市场的深刻理解，既能保障跨境业务无缝运营，又可确保符合当地法规与技术标准。这使得亚马逊云科技成为中国企业建立全球数字化布局、通过代理式 AI 解决方案推动创新与运营效率提升的理想合作伙伴。

Analyst comment
分析师观点

In the rapidly evolving global business landscape of the GenAI era, successful overseas expansion requires a holistic approach. Agentic AI can unlock the potential of Chinese enterprises, which need a reliable partner that understands the technology and can provide dependable and flexible infrastructure, as well as trusted expertise, to support their international growth. This partner should also offer full stack AI technology and services to help address the challenges they face.

在 GenAI 时代快速变化的全球商业格局中，成功的海外扩张需要采取整体方法。代理式 AI 能够释放中国企业的潜力，而这些企业需要一个既懂技术、又能提供可靠灵活的基础设施和可信赖专业知识的合作伙伴，以支持其国际业务增长。该合作伙伴还应提供全栈 AI 技术和服务，帮助应对企业面临的各项挑战。

Amazon Web Services stands at a pivotal moment as Chinese enterprises accelerate their global expansion across diverse industry sectors. This expansion presents unprecedented opportunities for Amazon Web Services' agentic AI to enable Chinese enterprises to leverage advanced AI capabilities without requiring extensive in-house expertise or infrastructure development, thereby allowing them to experiment, innovate quickly, and transform perceived limitations into competitive advantages. The company's robust ecosystem, characterized by its vast community of partners and developers as well as its strong local market presence across different regions, ensures that Chinese enterprises receive comprehensive support throughout their expansion journey.

随着中国企业在各行业加速全球化扩张，亚马逊云科技正迎来关键发展机遇。这种扩张为亚马逊云科技代理式 AI 创造了前所未有的机会，使中国企业无需大量内部专业知识或基础设施建设就能运用先进 AI 能力，从而快速进行实验创新，将潜在限制转化为竞争优势。亚马逊云科技强大的生态

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系统——包括庞大的合作伙伴与开发者社区，以及在不同区域的强劲本地市场布局——能够确保中国企业在全球化扩张过程中获得全方位支持。

Appendix

On the Radar

On the Radar is a series of research notes about vendors bringing innovative ideas, products, or business models to their markets. On the Radar vendors bear watching for their potential impact on markets as their approach, recent developments, or strategy could prove disruptive and of interest to tech buyers and users.

Further reading

Generative AI in China – 2025: The Year Agentic AI Proliferates (February 2025)

Generative AI in Asia & Oceania – 2025 - The Rise of Sovereign AI (February 2025)

Omdia Market Radar: GenAI Cloud Titans in Asia & Oceania 2025 (June 2025)

On the Radar: AWS ushers in a culture of experimentation in the AI era (January 2025)

Understanding Agentic AI: Attributes, Architecture, and the Ecosystem (May 2025)

Maximizing Agentic AI: Capturing Benefits, Addressing Challenges (May 2025)

Author

Lian Jye Su, Chief Analyst

askananalyst@omdia.com

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CONTACT US

omdia.com

askananalyst@omdia.com