The data and statistical information contained in this section and other sections of this Document are extracted from the Frost & Sullivan Report prepared at our request, as well as various official government publications and other publicly available sources. We commissioned Frost & Sullivan to prepare an independent industry report in connection with the [**REDACTED**]*, which is the Frost & Sullivan Report. The information from official government sources has not been independently verified by us, the Joint Sponsors,* [**REDACTED**]*, any of their respective directors or advisers, or any other persons or parties involved in the* [**REDACTED**]*, and no representation is made as to its accuracy.*

Data Sources and Reliability

This section contains information extracted from the Frost & Sullivan Report, which we engaged Frost & Sullivan to prepare, as we consider such information helpful for enhancing our understanding of the industry. Frost & Sullivan is a global consulting firm and an independent third party. Frost & Sullivan provides market research and other services across various industries. We have agreed to pay Frost & Sullivan a total fee of RMB500,000 for the commissioned services, which we believe is consistent with prevailing market rates. We believe that the payment of such fees does not compromise the fairness of the conclusions set out in the Frost & Sullivan Report. In preparing the Frost & Sullivan Report, Frost & Sullivan conducted both primary and secondary research. The primary research involved interviews with leading industry participants and experts, while the secondary research involved reviewing company reports, independent research reports, and data from Frost & Sullivan's research database. Frost & Sullivan also assumed that China's economy would likely maintain a stable growth during the forecast period and that China's social, economic, and political environment would likely remain stable throughout the forecast period.

OVERVIEW OF CHINA'S ENTERPRISE-GRADE AI SOLUTIONS MARKET

Definition of Enterprise-grade AI Solutions

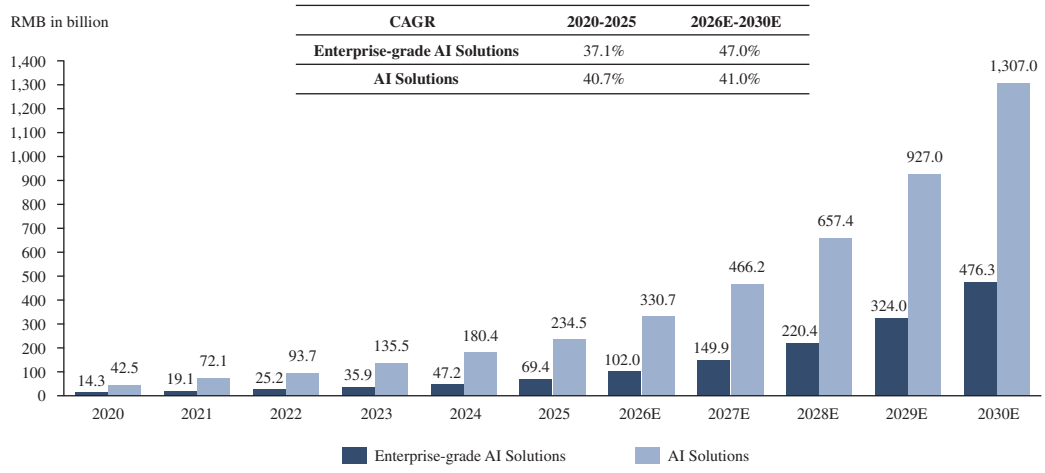
AI solutions refer to the application of AI technologies and methodologies to address specific problems or meet the needs of particular industries or application scenarios. This includes the use of machine learning, natural language processing, and other AI-based technologies to perform tasks such as task execution, decision-making, and content creation. Enterprise-grade AI solutions refer to AI systems designed specifically for large organizations such as government affairs and enterprises, which require high levels of security, scalability, and integration with complex business processes. Enterprises and the government affairs sector are key user groups for AI solutions. Enterprise-grade AI solutions primarily target business and government clients, and emphasize deep integration with business processes, management systems, and industry-specific applications. Their typical characteristics include complex application scenarios, diverse requirements, and high demands for data security, system stability, and compliance.

China's enterprise-grade AI solutions market has maintained rapid growth in recent years, driven by enterprises' intelligent upgrade, government digital transformation, and the continuous adoption of large AI models. Currently, enterprise-grade AI applications are gradually transitioning from single-point automation to comprehensive intelligence, with AI digital workers emerging as a key representative. AI digital workers integrate RPA, NLP, ASR, OCR, and LLM technologies and possess capabilities for cross-system operations, language understanding, knowledge reasoning, and task decision-making.

Market Size Analysis of China's Enterprise-grade AI Solutions

China's AI solutions market size continues to expand, with the enterprise-grade AI solutions market growing from RMB14.3 billion in 2020 to RMB69.4 billion in 2025, achieving a CAGR of 37.1% during this period. Driven by accelerated enterprise digital transformation and government intelligent construction, it is projected to grow at a CAGR of 47.0% from 2026 to 2030, reaching RMB476.3 billion by 2030.

Market Size of China's Enterprise-grade AI Solutions by Revenue, 2020-2030E



Source: Frost & Sullivan, Expert Interview

Development Trends of China's Enterprise-grade AI Solutions

Systematic Integration of Full-Chain AI Capabilities

Previously, AI solutions often focused on improving efficiency in single aspects, such as document recognition, voice interaction, or process automation. As enterprise digital transformation deepens, market demand is gradually shifting towards full-chain intelligence covering "perception-analysis-decision-execution," driving the evolution of AI solutions from tool-based products to systematic platforms. This trend not only enhances the scalability of solutions but also strengthens their adaptability in complex business processes.

LLM-Driven Generalization and Industry-Specific Application in Parallel

The emergence of generative AI and LLMs has significantly broadened the boundaries of AI solutions, equipping them with stronger language understanding and content generation capabilities. At the application level, LLMs have driven the generalization of AI solutions, while also accelerating their industry-specific implementation through training with industry data and knowledge. Looking ahead, a combination of general capabilities and industry-specific customization will become the mainstream approach, so as to balance cross-scenario flexibility with deep adaptation to industry scenarios.

Evolution from Decision Support to AI Agents

In the future, AI solutions will gradually evolve from their assistive role in "human-machine collaboration" into AI agents capable of autonomous decision-making and execution. By integrating technologies such as multimodal learning, reinforcement learning, RPA, and APA can achieve dynamic responses and closed-loop execution in more complex scenarios. This trend will drive the rapid popularization of new forms such as "AI digital workers" and "AI agents," and their large-scale application will first be realized in the enterprise-grade market.

Analysis of the Driving Factors in China's Enterprise-grade AI Solutions Market

Market-Driven Factors. As industrial competition intensifies and labor costs rise, enterprises generally seek to enhance operational efficiency, reduce costs, and strengthen compliance control capabilities through intelligent means. AI solutions can provide support in areas such as process automation, intelligent decision-making, and risk control, aligning with enterprises' core demands for cost reduction, efficiency improvement, and enhanced competitiveness, thereby driving rapid market development.

Technology-Driven Factors. Breakthroughs in technologies such as large AI models, natural language processing, and multimodal learning have significantly expanded the capability boundaries of AI solutions, enabling them to evolve from single-point tools into systematic platforms. Concurrently, application scenarios have expanded from traditional customer service and finance to more complex areas such as supply chain management, R&D, and public governance, further boosting the penetration rate of enterprise-grade AI solutions.

Policy-Driven Factors. In recent years, China has continuously promoted strategies such as "Digital China," "Smart Governance," and "New Industrialization," prompting government departments and large enterprises to accelerate their digital transformation processes. Complementing these broader initiatives, the government has issued targeted AI policies, including the "Artificial Intelligence+" Action Plan, sector-specific guidelines for finance, manufacturing, healthcare, consumer goods, and measures to strengthen data infrastructure, computing capabilities, and industry innovation platforms. These policy measures create both a regulatory framework and practical incentives that facilitate the adoption of AI solutions, encourage demonstration projects, and support replicable applications across different industries. As a result, enterprise-grade clients are increasingly receptive to AI technologies, particularly in areas such as government approval, public services, smart manufacturing, and energy management, effectively expanding the market space for AI digital workers and enterprise-focused AI solutions.

Analysis of Opportunities and Challenges in China's Enterprise-grade AI Solutions Market

Market Opportunities. China's digital strategy and AI development policies continue to be implemented, creating a stable policy environment and application space for enterprise-grade AI solutions. Key development directions such as smart governance, smart cities, and new industrialization will bring a large number of replicable application scenarios.

Market Challenges. Enterprise-grade AI solutions generally have high requirements for data security and compliance, especially where applications involve personal privacy, industry-sensitive information, and public governance. At the same time, some solutions have high technical complexity and require customized development, leading to long project cycles and high costs, which limits short-term adoption by small and medium-sized enterprises and grassroots government units. As industry competition intensifies, market participants need differentiated advantages in algorithmic capabilities, industry understanding, and delivery expertise to avoid homogeneous competition.

OVERVIEW OF CHINA'S ENTERPRISE-GRADE AGENT SOLUTIONS MARKET

Overview of Enterprise-grade Agent Solutions

AI agents represent the next stage of artificial intelligence, capable of forming a closed loop across perception, understanding, reasoning, and execution. Enterprise-grade agent solutions reflect the evolution of public-sector and enterprise AI toward intelligent, collaborative decision-making. With end-to-end capabilities, agents can operate in complex environments through task decomposition, tool coordination, and self-learning to enable dynamic decision-making and continuous optimisation.

Unlike traditional rule-based automation, enterprise-grade agents are built on LLMs and integrate knowledge bases, IDP, RPA, and task-specific models to form adaptive intelligent systems. They function as extensible platforms capable of invoking external tools, systems, and data to support collaboration across business modules.

In enterprise and public-sector scenarios, agents are replacing fragmented automation solutions to become a unified entry point for intelligent operations, and are expected to become a core form of future enterprise-grade AI solutions.

Enterprise-grade agent solutions typically feature stronger autonomy in task execution and adjustment, higher generalization across scenarios, continuous evolution through feedback and learning, and strong collaborative capability in orchestrating tools and completing complex workflows.

Market Size Analysis of China Enterprise-grade Agent Solutions

From early 2026, China's AI Agent market has moved from experimental demos to initial commercial deployment, accelerated by frameworks such as OpenClaw. Enterprise adoption has begun ahead of previous forecasts, with the market estimated at RMB18.0 billion in 2026 and expected to surge to RMB155.3 billion by 2030, achieving a CAGR of 37.1% during this period. This growth is driven by multi-agent collaboration, standardized integration protocols, and accessible reasoning and development tools, enabling AI Agents to orchestrate complex workflows across financial services, manufacturing, public services, and consumer applications. These trends indicate that 2026 marks the first year of large-scale commercial deployment in China, setting the stage for rapid market expansion by 2028.

OVERVIEW OF CHINA'S AI DIGITAL WORKER SOLUTIONS MARKET

Definition of AI Digital Workers

AI digital workers represent an important application form of enterprise-grade AI solutions at the execution level. They refer to a virtual workforce integrated with RPA and AI technologies such as OCR, ASR, NLP and LLMs, capable of replacing humans in performing rule-based, repetitive and cross-system operational tasks within enterprises and government agencies. Their core characteristic is the ability to process both structured and unstructured data, combined with semantic understanding and human-computer interaction capabilities.

Compared with traditional automation tools, AI digital workers can not only execute preset processes but also perform information extraction and judgment based on semantic understanding, thereby improving business process automation and standardization. Through large-scale deployment, AI digital workers help government and enterprise clients automate processes, reduce labor costs and improve processing accuracy. They have become one of the most mature forms of enterprise-grade AI solutions. With the introduction of LLM agent technology, knowledge bases and multimodal perception technologies, AI digital workers are evolving from automated execution to intelligent collaboration, with expanding functional boundaries. Overall, AI digital workers assist government and enterprise clients in accelerating intelligent transformation.

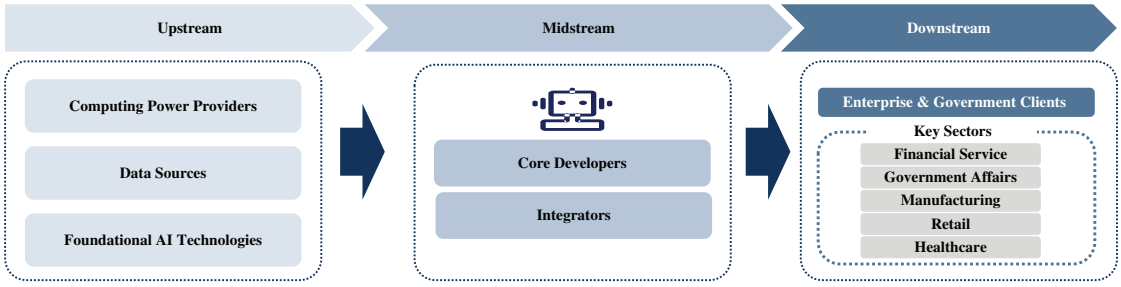
Development History of AI Digital Workers

The development of AI digital workers has progressed from initial applications based on process automation, gradually evolving towards intelligent and collaborative upgrading. Early digital workers, building upon software robots, continuously integrated AI capabilities such as

OCR, NLP, and ASR, forming an "RPA+AI" technology combination. This enabled them to function as a virtual workforce, processing unstructured data and supporting basic human-computer interaction. With the rise of LLMs and AI agents, AI digital workers have further gained the ability to decompose tasks and autonomously coordinate multiple tools. They can simulate human behavior and decision-making, achieving intelligent execution across systems and processes in more complex scenarios. In this manner, they have gradually evolved into a highly flexible and autonomous virtual workforce.

Value Chain Analysis of the AI Digital Worker Solutions Industry

The following diagram illustrates the value chain of AI digital worker solutions industry:



Source: Frost & Sullivan

Analysis of Target Markets and Downstream Application Scenarios in the AI Digital Worker Solutions Industry

Financial Services

Financial institutions have complex business processes and strict compliance requirements, and downstream clients mainly include banks, securities firms, insurance companies, and fund companies. Typical application scenarios cover high-frequency operations such as invoice processing, customer information verification, transaction monitoring, and compliance reporting. AI digital workers can achieve automated entry and review of invoices and contracts through OCR and NLP, improving business processing efficiency and reducing human error rates, while also providing auxiliary support in risk monitoring and anti-money laundering processes.

Government Affairs

The government affairs sector primarily covers government departments, public institutions, and social security agencies, with application demands concentrated in administrative approvals, archives management, tax declarations, social security operations, customs clearance, and judicial affairs. AI digital workers can automatically perform material review, form entry, and cross-system data flow, enhancing the efficiency and standardization of government services, and are especially widely applied in social security systems.

Manufacturing

Manufacturing applications are primarily concentrated in sub-sectors such as equipment manufacturing, electronics manufacturing, and the automotive industry chain. AI digital workers can be applied in processes such as purchase order entry, production plan reconciliation, supply chain tracking, and quality management, improving the accuracy and timeliness of data transfer.

Retail

The retail industry covers department store chains, e-commerce platforms, and new retail enterprises, characterized by large business volumes and extensive customer touchpoints. AI digital workers automate tasks in areas such as order processing, inventory management, customer service inquiries, and member operations, and help enterprises improve transaction processing efficiency and customer response speed.

Others

The others sector covers a diverse range of industries, such as energy and education. In the energy sector, application demands are concentrated in equipment operation and maintenance, safety monitoring, and dispatch support, where AI digital workers assist in inspection scheduling, fault diagnosis, and data analysis to enhance operational efficiency and safety. In the education sector, demand is focused on training, teaching, and learning management systems, where AI digital workers can support administrative management and content generation, improving service efficiency and user experience.

Market Size Analysis of China's AI Digital Worker Solutions

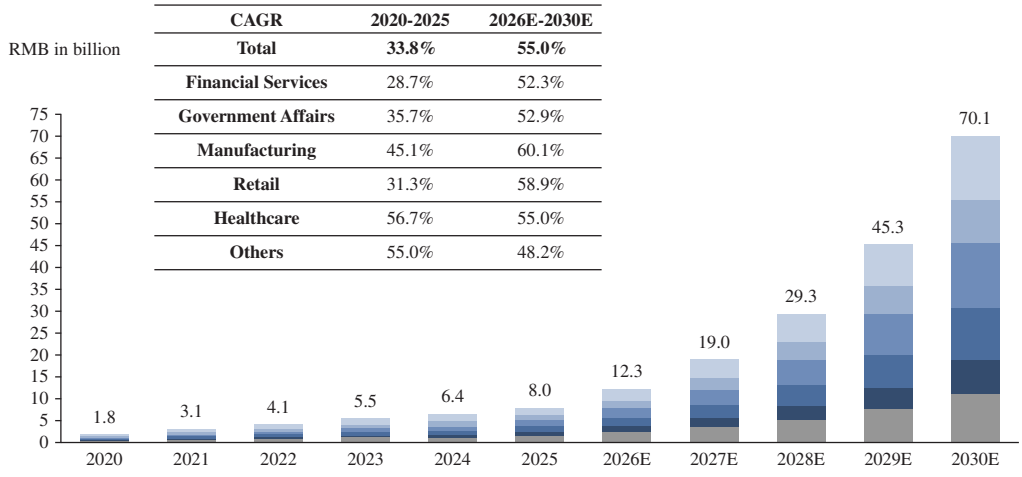
China's AI digital worker solutions can be primarily categorized into financial services, government affairs, manufacturing, retail, healthcare, and other scenarios. Among these, the financial services industry is the earliest application sector to achieve large-scale implementation, with its market size growing from RMB0.5 billion in 2020 to RMB1.8 billion in 2025, at a CAGR of 28.7%. As AI-driven advancements in intelligent customer service, risk control review, and report generation progress, it is projected to grow at a CAGR of 52.3% from 2026 to 2030, reaching RMB14.7 billion by 2030. The government affairs sector has become one of the fastest-growing areas for AI digital workers deployment in recent years. Its market size increased from RMB0.3 billion in 2020 to RMB1.2 billion in 2025, with a CAGR of 35.7%. It is projected to grow at a CAGR of 52.9% from 2026 to 2030, reaching RMB9.8 billion. In this area, AI digital workers are primarily applied in government approvals, information archiving, public services, and assisted decision-making.

Within the government affairs sector, customs and courts represent key sub-segments. The market size of AI digital workers in the courts sector increased from RMB0.02 billion in 2020 to RMB0.11 billion in 2025, representing a CAGR of 43.7%, and is expected to reach RMB0.98 billion by 2030, with a CAGR of 55.0% from 2026 to 2030. The enterprise-grade AI agent solutions market in the courts sector is expected to grow at a CAGR of approximately 52.0% from 2026 to 2030. Growth is driven by policy support under the 14th Five-Year Plan and increasing demand for intelligent applications in judicial processes. The market size of AI digital workers in the customs sector increased from RMB0.02 billion in 2020 to RMB0.14 billion in 2025, representing a CAGR of 51.1%, and is expected to reach RMB1.2 billion by 2030, with a CAGR of 53.5% from 2026 to 2030. The enterprise-grade AI agent solutions market in the customs sector is expected to grow at a CAGR of approximately 50.0% from 2026 to 2030. Growth is driven by "smart customs" initiatives and rising complexity in cross-border trade, with further acceleration expected from e-commerce expansion and AI technology upgrades.

Within the others sector, energy and education represent key sub-segments. The market size of AI digital workers in the energy sector increased from RMB0.12 billion in 2020 to RMB0.47 billion in 2025, representing a CAGR of 31.2%, and is expected to reach RMB3.3 billion by 2030, with a CAGR of 48.0% from 2026 to 2030. The enterprise-grade AI agent solutions market in the energy sector is expected to grow at a CAGR of approximately 56.0%

from 2026 to 2030. Growth is driven by digital transformation and demand for intelligent operation and safety management. The market size of AI digital workers in the education sector increased from RMB0.05 billion in 2020 to RMB0.23 billion in 2025, representing a CAGR of 33.4%, and is expected to reach RMB1.69 billion by 2030, with a CAGR of 49.4% from 2026 to 2030. The enterprise-grade AI agent solutions market in the education sector is expected to grow at a CAGR of approximately 58.0% from 2026 to 2030. Growth is supported by demand for intelligent teaching and management solutions and scalable deployment across institutions.

Market Size of China's AI Digital Worker Solutions by Downstream Application Scenarios, 2020-2030E



	2020	2021	2022	2023	2024	2025	2026E	2027E	2028E	2029E	2030E
Financial Services	0.5	0.8	1.1	1.4	1.7	1.8	2.7	4.2	6.3	9.7	14.7
Government Affairs	0.3	0.5	0.7	0.9	1.2	1.2	1.8	2.7	4.2	6.4	9.8
Manufacturing	0.2	0.4	0.5	0.7	0.9	1.4	2.3	3.6	5.8	9.2	14.8
Retails	0.3	0.5	0.7	0.9	1.1	1.2	1.9	3.0	4.7	7.5	11.9
Healthcare	0.1	0.2	0.3	0.4	0.5	0.9	1.3	2.1	3.2	5.0	7.7
Others	0.4	0.7	0.8	1.2	1.1	1.6	2.3	3.4	5.1	7.5	11.2

Source: Frost & Sullivan, Expert Interview

Cost and Price Analysis of Major AI Digital Worker Solutions in China

From 2020 to 2023, the market price of AI digital worker solutions generally remained stable, showing only a slight downward trend. On project basis, the product is priced at approximately RMB100,000 to RMB500,000. In 2024, with the introduction of new technologies such as generative LLMs, solutions functionalities and application value significantly improved, leading to a notable increase in overall pricing. From 2025 to 2027, as application scenarios accelerate expansion and functionalities continuously enhance, price levels are expected to maintain a relatively fast growth momentum. Starting from 2028, with intensified market competition and gradual solutions standardization, price growth is anticipated to slow down, and the overall trend is expected to stabilize.

The costs of AI digital worker solutions primarily include R&D, sales, and delivery. R&D covers model development, product iteration, and computing power; sales includes marketing, channel development, and pre-sales support; and delivery involves system deployment, customization, and maintenance. From 2020 to 2022, the cost structure remained stable, with R&D accounting for approximately 40%, and sales and delivery about 25% and 35%,

respectively. Going forward, with deeper adoption of generative LLMs, R&D investment is expected to increase, while sales costs may decline as market education and channels mature. Delivery costs are expected to remain relatively stable due to ongoing deployment and support needs.

Development Trends of China's AI Digital Worker Solutions Market

From Rule-Based Execution to Intelligent Upgrade

China's AI digital workers are evolving from rule-based process automation to an intelligent stage integrating technologies such as OCR, ASR, NLP, and knowledge graphs. With the introduction of LLMs, their capabilities in processing unstructured data, semantic understanding, and interaction have been enhanced, enabling them to handle more complex business scenarios.

Evolving from Process Automation to Autonomous Intelligence

AI digital workers are evolving from rule-based process tools into AI agents with capabilities spanning perception, understanding, reasoning, and execution. They are expanding from pilot scenarios such as customer service and marketing to more complex areas including financial risk control, government approval, manufacturing quality inspection, and healthcare operations. By incorporating semantic understanding, knowledge reasoning, and cross-system collaboration, AI agents can autonomously plan and dynamically adapt to tasks, improving the intelligence level of government and enterprise processes.

Developing Towards Ecosystem Platforms and Multi-AI-Agent Collaboration

As the intelligent transformation of government and enterprises deepens, AI digital workers are evolving into AI agents with perception, reasoning, and collaboration capabilities. In the future, AI agents are expected to become key components of enterprise digital platforms, forming intelligent workforce networks. Through multi-agent collaboration, agents with different functions can achieve task division, process handoff, and knowledge sharing within business workflows.

Opportunities and Challenges in China's AI Digital Worker Solutions Market

Market Opportunities. The emergence of AI agents reflects the evolution of AI digital workers to a higher level. Through a closed loop of perception, understanding, reasoning, and execution, AI agents enable AI solutions to achieve stronger adaptability and broader application scenarios. With the advancement of core AI technologies and the improvement of the application ecosystem, AI agents are expected to become an important driver for the continued development of AI digital workers, with their market potential gradually emerging.

Market Challenges. The application of AI agents is still at an early stage, facing challenges such as high computational costs that limit large-scale adoption in the short term. Their autonomy and decision complexity also introduce risks related to security, controllability, and trustworthiness, particularly in government and enterprise scenarios. In addition, the industry ecosystem remains immature, lacking unified technical standards and governance frameworks. These factors may constrain large-scale deployment and limit the full realization of AI agents' potential value.

MARKET COMPETITION ANALYSIS

Competitive Landscape of China's AI Digital Worker Solutions Market

China's AI digital workers market is currently in a phase of rapid growth coexisting with market differentiation, with overall concentration being relatively limited. In 2025, the combined market share of the top five vendors was less than 20%, and a clear monopolistic structure has not yet formed. Market participants primarily include former RPA vendors, AI automation solution providers, and others, with different types of enterprises competing in various fields based on their respective technological advantages and customer resources.

Ranking of AI Digital Worker Solutions Companies in China by Revenue, 2025

The enterprise-grade AI solutions market in China expanded from RMB14.3 billion in 2020 to RMB69.4 billion in 2025, representing a CAGR of 37.1% over the same period. Within China's enterprise-grade AI solutions market, AI digital worker solutions accounted for approximately 11.2% of the total market in 2025. By revenue, we ranked first among China's AI digital worker solutions market in 2025. The top-ranking companies are as follows:

Ranking	Company	Revenue (RMB in Million)	Market Share %
1	**Our Company**	**256.1**	**3.3%**
2	Company A	230.0	2.9%
3	Company B	162.0	2.1%
4	Company C	135.0	1.7%
5	Company D	105.0	1.3%
Total		**7,810.0**	**100%**

Ranking of China's AI Digital Worker Solutions in the Financial Services Sector by Revenue, 2025

Within China's AI digital worker solutions market, China's AI digital worker solutions in the financial services sector accounted for 23.0% of the total market in 2025. We ranked No. 1 in terms of revenue among China's AI digital worker solutions companies in the financial services sector. The top-ranking companies are as follows:

Ranking	Company	Revenue (RMB in Million)	Market Share %
1	**Our Company**	**177.9**	**9.9%**
2	Company D	35.0	2.0%
3	Company C	30.1	1.7%
Total		**1,794.0**	**100%**

**Note:*

Company A: Founded in Hangzhou, focuses on providing RPA and AI digital worker solutions for clients across various industries, enabling end-to-end automation of applications on both PC and mobile platforms, with broad applications in manufacturing, e-commerce, and enterprise operations.

Company B: Founded in Beijing, is a company focus on intelligent automation and AI digital worker solutions, offering an integrated product suite that includes RPA, IDP, and Conversational AI. Its solutions are widely adopted across government agencies, financial institutions, retail, manufacturing, and service industries.

Company C: Founded in Zhejiang, is an AI technology company specializing in the development and application of AI digital worker solutions and Agentic intelligence, with core products including AI Agents, RPA, and IDP systems. The company serves clients in manufacturing, energy, transportation, telecommunications, financial services, and government affairs sector.

Company D: Founded in Shanghai, is a high-tech enterprise specializing in hyper automation and AI digital worker solutions, providing RPA and intelligent process automation solutions that are extensively applied in energy, manufacturing, financial services, and government affairs sector.

Entry Barriers to the AI Digital Worker Solutions Industry

Technology Barrier. AI digital workers rely on the integration of multiple AI technologies and RPA, require deep and wide compatibility with enterprise application systems. The technical challenge lies not only in achieving breakthroughs in individual areas, but more importantly in ensuring synergy and stability across multiple technologies.

R&D Barrier. Products require long-term R&D accumulation and scenario-based optimization, involving both algorithm refinement and reliance on feedback from large-scale enterprise applications. The R&D process often demands interdisciplinary team collaboration, encompassing AI, automation processes, industry knowledge, and system integration. Even if new entrants possess some technologies, they still require a long time for validation and iteration, making it difficult to rapidly achieve commercialization.

Capital Barrier. The R&D and promotion of AI digital workers require continuous capital investment in computing infrastructure, LLM training, data annotation, and ongoing maintenance and upgrades. New entrants often lack sufficient capital to build R&D and delivery capabilities, while existing players benefit from continuous financing and first-mover advantages, increasing barriers to entry.