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Laying the Groundwork for Enterprise Digital-Intelligent Transformation and Unlocking Innovation-Driven Industrial Growth Potential

——A White Paper on Cloud Marketplace Trends

CONTENTS

IDC Opinion

Cloud marketplaces serve as critical enablers in the rapid shift of enterprise IT services from traditional to cloud-native architectures, emerging as a key driver of global digital transformation (DX) across industries. Acting as a central hub that connects cloud service providers (SPs), technology partners, and end users, cloud marketplaces continuously promote the synergistic development of the global cloud computing industry by fostering a mutually beneficial value network. Driven by the dual engines of DX and intelligent transformation, China's cloud marketplaces are showing even stronger growth momentum.

Through technological innovation and ecosystem collaboration, cloud marketplaces deliver value to developers, partners, and end users. On the technology front, cloud SPs build powerful, layered, and decoupled platform systems to support ecosystem partner innovation, achieving synergy between partner enablement and user experience optimization. From an ecosystem perspective, cloud marketplaces foster synergy between partner and user ecosystems, accelerating end-to-end value realization of cloud technologies. As the central hubs connecting enterprise customers and ecosystem service partners, cloud marketplaces are reshaping the core logic of enterprise digital-intelligent transformation by introducing two key drivers of the value chain: digital-intelligent enterprises and digital-intelligent partners.

Globally and in China, cloud marketplaces typically operate under two models: a product-based (application-centric) model and a service-based model. Global cloud marketplaces offer more SaaS-based general-purpose and industry-specific products. By contrast, customers in the Chinese market expect more customized services provided by software SPs during the pre-sales process. This has led to the marketplace service model, where cloud SPs collaborate with regional or industry authorities to build tailored platforms that address region- and industry-specific demands.

The successful development and implementation of cloud marketplaces depends on four key pillars: technology, ecosystem, business model, and quality. The growth of cloud marketplaces in China is influenced by multiple factors—such as market dynamics, technology ecosystems, and business models—necessitating coordinated stakeholder collaboration to break through bottlenecks and achieve sustainable expansion. In the development of cloud marketplace-related industries, enterprises, ecosystem partners, and local/industry governors need to focus on the dynamics of the industries and maximize the value of empowerment and innovation of cloud marketplaces through rational development paths and solid, effective market-oriented practices.

Looking ahead, in response to the global wave of GenAI, cloud marketplaces are evolving from software trading platforms into intelligent ecosystem aggregation platforms. Cloud marketplaces will be deeply integrated with AI, hybrid cloud, cloud native, and other technologies to further optimize computing power scheduling, cross-cloud collaboration, and security compliance capabilities, and continuously improve the penetration rate in vertical sectors such as government, manufacturing, and healthcare through innovative business models, attracting more participants and creating diversified use case solutions.

Chapter 1

The Rise and Current Landscape of Cloud Marketplaces

In today's thriving digital economy, enterprise IT services are rapidly evolving from traditional architectures to cloud-native frameworks. Cloud marketplaces, as key enablers of this transition, are emerging as critical drivers of DX for enterprises worldwide. They aggregate full-stack cloud services from cloud SPs, cloud applications from third-party developers, and business innovation demands from enterprise users. Through standardized and online approaches, they transform the traditional processes of software procurement, deployment, and operations and maintenance (O&M) into efficient and agile online digital delivery capabilities.

Cloud marketplaces offer new opportunities for collaborative development among all parties involved in cloud services: cloud vendors can expand their service boundaries and drive market growth; ecosystem developers gain more technological empowerment and global distribution channels; and enterprises can enjoy a wealth of innovative cloud services more quickly and at a lower cost.

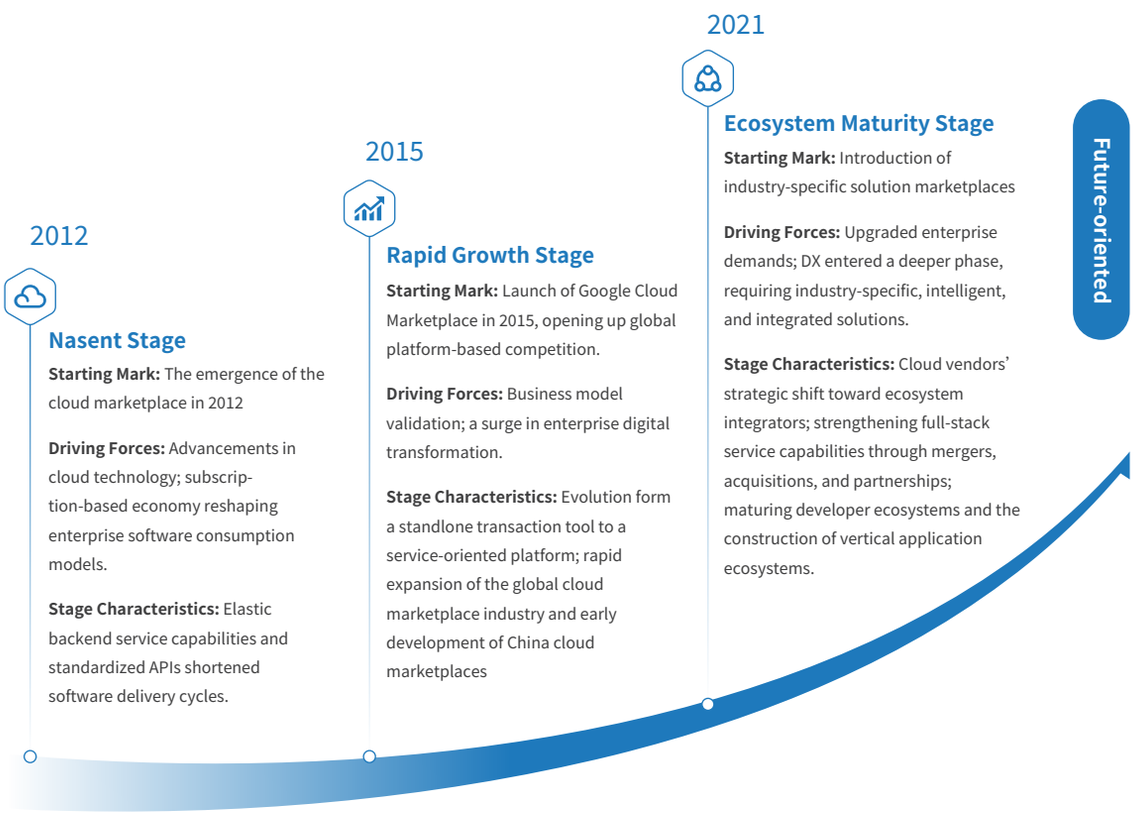
With the deep integration of technologies such as AI and edge computing, cloud marketplaces are evolving into central value hubs for ecosystem innovation, driving the co-creation of a thriving market in enterprise digital-intelligent transformation.

1.1 Definition and Evolution: From Trading Platforms to Ecosystem Hubs

According to IDC, cloud marketplaces are one-stop transactions and service platforms built on cloud service capabilities, catering to enterprises (and individual users), and bringing together a large amount of third-party software, data, solutions, and related integration and value-added services. Leveraging thriving cloud software ecosystems, cloud marketplaces enable seamless connections between software providers and enterprise users. Through cloud marketplaces, users can efficiently discover, compare, procure, and manage approved third-party cloud applications and services. These offerings can be easily integrated with the infrastructure and platform services of cloud SPs, enabling access to cutting-edge software innovations in a more cost-effective manner.

According to IDC research, cloud marketplaces have undergone key stages—rapid expansion, and ecosystem maturity—reflecting the full evolution from a transactional tool to a robust digital ecosystem.

Figure 1 Stages of Cloud Marketplace Growth and Their Defining Features



Source: IDC, 2025

Nascent Stage: Cloud Technology Maturity Reshaped Enterprise Software Consumption Models

In the early 21st century, with the advent of cloud computing services, cloud technologies, products, and operational levels advanced rapidly in a period. Following years of advancement, enterprises widely adopted this service-based IT infrastructure featuring pay-as-you-go pricing, resiliency, and high availability and reliability. The maturity of cloud computing services led to the emergence of cloud marketplaces, which are not only the inevitable result of technological evolution, but also a direct reflection of enterprises' demand for DX.

- **Cloud computing stimulated enterprise IT demands:** Cloud adoption further stimulated IT needs across enterprises, continually unlocking the potential of data and enabling a wider range of use cases powered by cloud services.
- **Leading cloud SPs were expected to launch more innovative, cloud-enabled applications:** In response to the growing enterprise demand for rapid application innovation and enablement, these providers explored ways to deliver richer SaaS-based solutions more efficiently.
- **Third-party software services became an important cornerstone of a thriving market:** Numerous third-party software vendors leveraged their deep industry expertise and the advanced capabilities of cloud platforms to meet the diverse IT demands of enterprise enterprises.
- **Emergence of cloud marketplaces:** In 2012, driven by rapid development in cloud infrastructure technology, AWS launched AWS Marketplace globally. This unified transaction and service platform offered a wide range of third-party software and solutions built on AWS. By enabling enterprises to access resilient backend services and standardized APIs, it significantly improved IT delivery efficiency while reducing technical and financial risks.

Rapid Expansion Stage: Platform-Based Services Driving Industry Scaling

Following the market validation of the AWS Marketplace model, major cloud SPs quickly followed suit, led by Microsoft Azure and Google Cloud, which launched their own cloud marketplaces. Amidst open market competition, the cloud marketplace industry scaled rapidly. Meanwhile, the wave of digital transformation gained momentum across industries, with surging demand for software services, particularly among the vast number of small and medium-sized enterprises (SMEs).

- **Rapid growth in software volume and scale:** Driven by enterprise innovation needs, the number of third-party software providers and their transaction volumes on cloud platforms soared. In this open and transparent market environment, software vendors delivered a wide range of innovative products for industries.

- **Emergence of value-added services:** In addition to offering software products, cloud marketplaces provided value-added services such as technical consulting, data services, application integration, and after-sales support. This substantially reduced the cost of procurement, integration, testing, and O&M, while better addressing enterprise needs for security and compliance.
- **Technological advancements driving platform growth:** During this period, powerful full-stack cloud capabilities, exemplified by cloud-native technologies, played a key role. More software providers began developing applications based on containerization and microservices architectures and adopted DevOps toolchains and automated deployment platforms. This made the delivery and iteration processes more agile and further drove cloud marketplaces development from the supply side.
- **Launch of Chinese cloud marketplaces:** With the rapid growth of China's cloud computing market, Chinese hyperscalers such as Alibaba Cloud (2013), Tencent Cloud (2015), and Huawei Cloud (2017) launched their own cloud marketplaces. These providers aimed to capitalize on enterprise customer bases to promote cloud application development and drive consumption of foundational cloud services. At the same time, global cloud vendors began entering the Chinese market: AWS Marketplace was launched in China in December 2018, followed by its application ecosystem expansion in 2019. However, due to regulatory constraints, global players were required to partner with local firms for product listings and operations.

Ecosystem Maturity Stage: A Scalable Cloud Software Ecosystem Gradually Took Shape

As cloud marketplaces reached a scaled competitive state, enterprise users raised their expectations for cloud-driven innovation, seeking to continuously advance their DX and intelligent transformation by leveraging innovations emerging from the marketplaces. Therefore, cloud SPs focused more on the service experience of enterprise users and continuously strengthened the integration of full-stack cloud services and one-stop software integration capabilities.

- **Enterprise demands changed:** Enterprise DX entered a deeper phase. Enterprise users no longer sought only basic infrastructure services, but required integrated solutions that could address industrial-specific and intelligent needs, such as integrating AI, data intelligence, and industry SaaS services into business systems to enable systematic progress.

- **Cloud vendors shifted to ecosystem strategies:** Hyperscalers further recognized the strong driving force of ecosystem aggregation. To better attract innovators and promote collaborative development, cloud marketplaces began shifting their core focus from platform-level service features to the leadership in ecosystem co-creation.

- **Mutual enablement of platforms and ecosystems:** With the rise of full-stack integration services on cloud marketplaces, users focused on aligning products with business needs, rather than selecting and optimizing the platforms and underlying technologies. On the other hand, technologies such as big data and blockchain were introduced to enhance governance, search, recommendation, and transaction security. In addition, cloud marketplaces launched various partner programs and growth initiatives to attract more software developers and system integrators to the ecosystem.

Looking ahead, advanced AI technologies, such as GenAI and large models, are beginning to reshape cloud marketplaces, with the potential to drive them into a new phase of intelligent transformation within the next two years. The core logic of this change is that applications, as the key vehicle for the implementation of AI technologies, are accelerating the integration with intelligent capabilities such as machine learning and natural language processing to form a new generation of "AI + application" product suites. As global hubs for application distribution, cloud marketplaces are evolving from traditional application transaction platforms into intelligent capability exchange centers. On one side, it connects developers' algorithmic models with real-world business use cases; on the other side, it enables behavioral data feedback to support iterative optimization of AI models. This bidirectional enablement will spark a paradigm shift, transforming cloud marketplaces from functional application depots into self-evolving intelligent ecosystem hubs, and ultimately realizing the leap from application-as-a-service to intelligence-as-a-service. In this process, leading cloud marketplace platforms are expected to

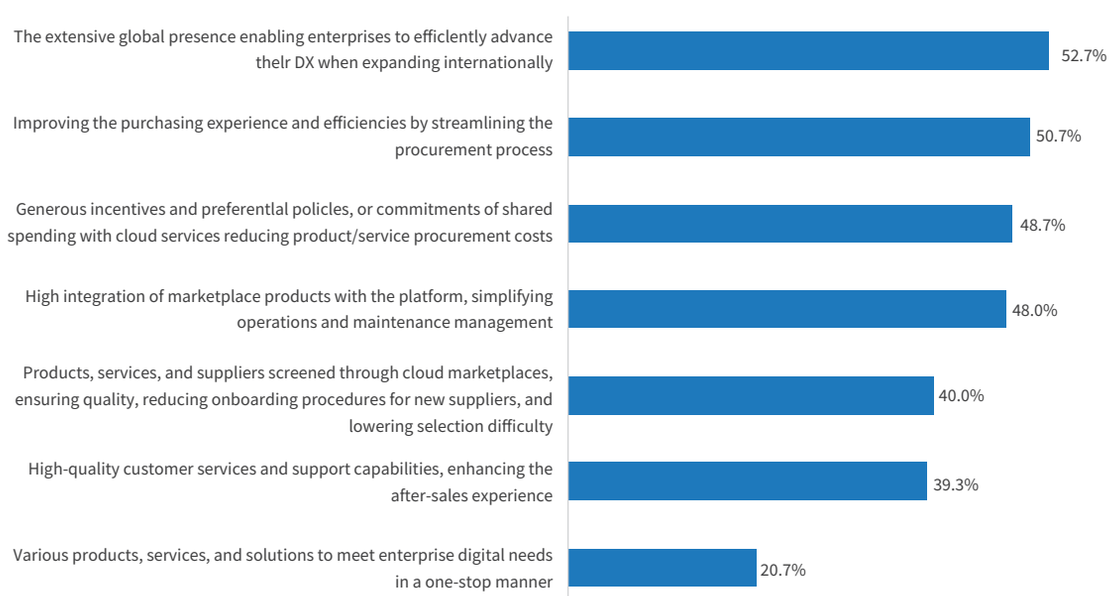
establish a full-lifecycle intelligent service system covering development, transactions, and operations by building AI model marketplaces, automated deployment toolchains, and dynamic pricing systems.

1.2 The Core Value of Cloud Marketplaces: A Super Hub Connecting Supply and Demand Across the Cloud Ecosystem

With the innovative model of **"platform + ecosystem",** cloud marketplaces are demonstrating their strong resource integration capabilities in the global digital economy. As the core hub connecting cloud SPs, technology partners, and end users, cloud marketplaces are continuously driving the coordinated development of the global cloud computing sector by building an all-win value network.

In China market, driven by the two engines of DX and intelligent transformation, the local cloud marketplaces have strong development momentum. According to IDC's 2025 annual survey data, China's cloud marketplaces are creating significant value for all stakeholders: providing a standardized and centralized digital service portals for industry users, building a sustainable business environment for ecosystem partners, and fostering a more competitive service ecosystem for cloud vendors.

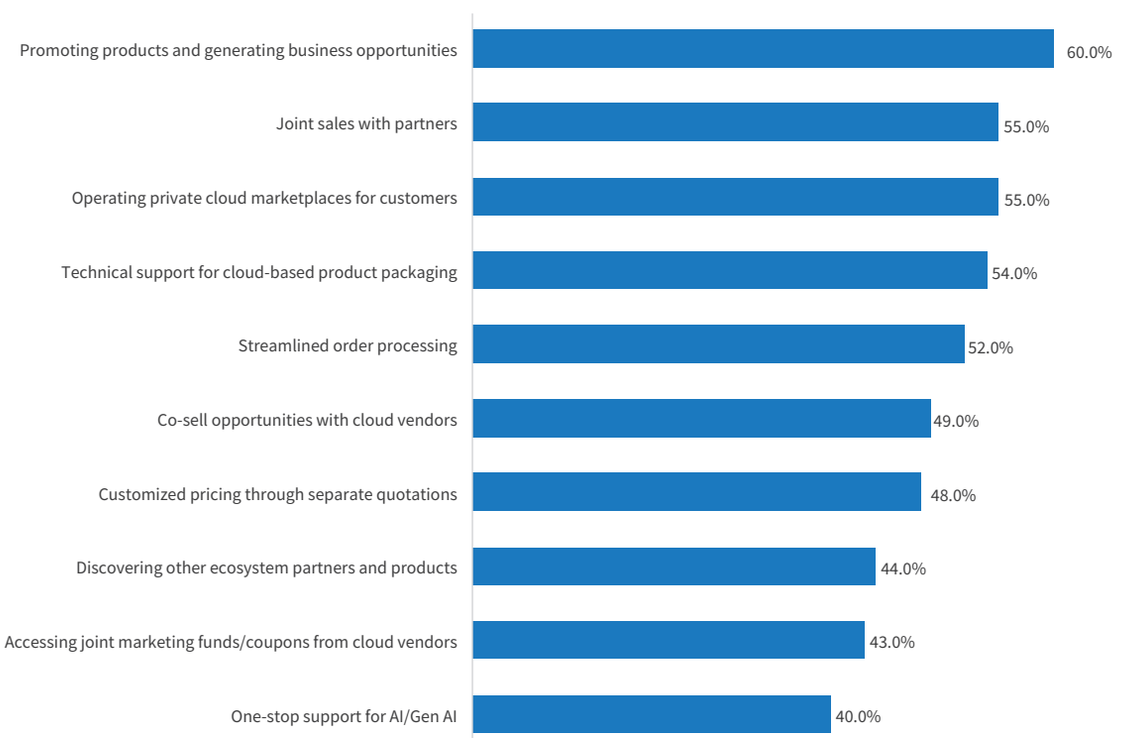
Figure 2 The Core Value of Cloud Marketplaces to Industry Users



Source: IDC, 2025

- **For industry users, cloud marketplaces,** through their standardized and platform-based service model, can significantly optimize enterprises' global IT support capabilities, enabling centralized management of procurement processes and continuous optimization of cost structures. Concurrently, based on a platform-level O&M support system, cloud marketplaces can effectively reduce the complexity of enterprise IT operations. Particularly, the platform's stringent vetting mechanism consistently ensures the quality of procured products and services. Furthermore, comprehensive after-sales support mechanisms can ensure users' business continuity. This value closed-loop has become an indispensable infrastructure support for enterprise DX.

Figure 3 The Core Value of Cloud Marketplaces to Ecosystem Partners



Source: IDC, 2025

- **For ecosystem partners,** the core value of cloud marketplace platforms is mainly reflected in the following dimensions: Firstly, they facilitate high-quality business lead conversion through platform-level promotion and joint sales mechanisms. Secondly, partners can leverage the platform to provide richer services to customers, including bundled technical support, and even assist customers in building and operating private cloud marketplaces, thereby fulfilling customized deployment needs through private cloud marketplace solutions. Thirdly, they effectively improve transaction and order management efficiency, making the entire transaction process more convenient and standardized, while also achieving a more competitive pricing system based on the advantages of scaled procurement. Fourthly, they continuously expand service boundaries based on the ecosystem to build differentiated competitive advantages. These value elements collectively form the multi-dimensional empowerment framework that cloud marketplaces provide for ecosystem partners.

- **For cloud vendors,** cloud marketplaces serve not only as strategic platforms for ecosystem development but also as critical tools for strengthening the competitiveness of their own cloud services. The maturity of a cloud marketplace directly influences customer purchasing decisions, as it determines whether enterprises can conveniently access all necessary value-added services—such as AI models, SaaS applications, and industry solutions—from a single source. Leading cloud vendors need to position their cloud marketplaces as strategic strongholds, attracting more independent software vendors (ISVs) and developers by offering open APIs, optimizing revenue-sharing mechanisms, and providing AI deployment tools, thereby forming a complete closed-loop of "infrastructure + platform capabilities + application ecosystem." In the future, with the explosion of AI-driven intelligent applications, the value of cloud marketplaces will be further highlighted. These platforms will not only reduce the cost for enterprises to procure and manage third-party services but also help customers quickly build end-to-end digital solutions with functions like intelligent recommendations and automated integration, ultimately providing key competitive barriers for cloud vendors.

1.3 Global and China Cloud Marketplaces: Status Quo and Future Trends

Global Cloud Marketplace Development

- **Overall maturity and leadership:** After years of development, cloud marketplaces, represented by AWS and Azure, have built a comprehensive ecosystem framework. They boast a large number of ecosystem partners, a diverse portfolio of software and services, and strong influence among global users. Many enterprises have already established routine procurement mechanisms on cloud marketplaces.

- **Flexible operating models:** Overseas cloud marketplaces have established highly flexible pricing and billing models. In addition to the common pay-as-you-go model, cloud marketplaces support various billing methods, including subscription-based and per-license billing.

- **Standardized service mechanisms:** Over years of operation, overseas cloud marketplaces have developed mature technical support and user feedback systems, primarily driven by standardized online processes. These ensure timely responses to user service needs. Moreover, a series of international service standards enables partners to swiftly enter global markets, streamline product listing, and reduce disputes and complaints.

- **Security and compliance:** Overseas cloud marketplaces impose stringent requirements on data and software security, in full compliance with international standards and regional regulations, such as the General Data Protection Regulation (GDPR). Vendor product listings undergo rigorous testing and review procedures to ensure compliance.

China Cloud Marketplace Development

- **Overall rapid growth:** China cloud marketplace industry is currently experiencing a phase of rapid expansion, marked by growing market size and a gradually maturing ecosystem. Leading cloud vendors are actively developing their own marketplace

platforms to deliver full-stack services across IaaS, PaaS, and SaaS, aiming to build differentiated competitive advantages through industry-specific solutions.

- **Relatively simple operational model:** Compared to international markets, China's cloud marketplaces still lag in product diversity and ecosystem vitality. This is largely due to the domestic business environment and procurement habits—many enterprises still rely on traditional procurement channels and perceive cloud marketplaces merely as basic product catalogues, without fully understanding their strategic value. In addition, many cloud vendors have not yet developed mature marketplace operations, and common issues persist, such as unclear product categorization, infrequent updates, and the absence of win–win mechanisms between platforms and vendors.

- **Broad development potential:** As cloud adoption accelerates among Chinese enterprises, there is rising demand for external innovation to support business transformation—particularly in the context of the GenAI-driven wave of intelligent digitalization. In response to intensifying competition in China's cloud services market, major providers are investing in building and operating their own cloud marketplaces to establish a strong competitive moat through ecosystem development. At the same time, software development companies are increasingly viewing cloud marketplaces as a channel to focus on innovation while improving cost-efficiency and operational agility.

IDC believes that, supported by favorable policies and surging enterprise DX demand, China's cloud marketplaces are poised for accelerated, multi-faceted growth.

Policy-Driven Growth

- **From a top-level policy perspective,** Chapter Five of the *Outline of the 14th Five-Year Plan for Economic and Social Development and Long-Range Objectives through the Year 2035 of the People's Republic of China Plan (referred to as the "14th Five-Year Plan")* explicitly puts forward the general requirement of "accelerating digital development and building a digital China." It also outlines measures to advance digital industrialization and support the healthy development of platform and sharing economies. After years of development, cloud computing has become an important enterprise IT infrastructure and an important support for industrial digitization transformation.

Many enterprise digital innovation projects are flourishing in the cloud. As a B2B-focused platform economy model, cloud marketplaces are expected to become vital infrastructure for China's digital future and broader digital economy. As enterprise cloud infrastructure continues to mature, large volumes of data centers must improve cloud operational efficiency and develop industry-specific applications to expand use cases for cloud computing power. In this process, the development of PaaS and SaaS can continuously drive the improvement and optimization of cloud infrastructure.

- **From the perspective of the digital economy industry,** the 14th Five-Year Plan proposes the "Migrating to Cloud, Using Digital Tools and Enabling Intelligence,"aiming to promote data-driven transformation across entire value chains. It also supports the development of internationally competitive industrial internet platforms and DX hubs in key sectors and regions. The 14th Five-Year Plan for the Development of Digital Economy outlines a series of detailed policy guidelines to vigorously promote industrial digital transformation, covering Internet platforms, leading enterprises in key sectors, industrial parks, and industrial clusters. Regarding industry digitalization, the plan specifically highlights the need to "foster a supportive service ecosystem for transformation." It calls for "the cultivation and promotion of a range of digital solutions tailored to the transformation needs of key industries and enterprises. It also emphasizes the development of third-party specialized SPs in areas such as transformation consulting, standards development, and testing and evaluation, to expand and energize the market for DX services." In this policy and market environment, cloud marketplaces serve as both a strategic enabler of industrial digitalization and a central platform for uniting diverse ecosystem partners. This, in turn, facilitates the emergence of a new digital services ecosystem and plays a pivotal role in propelling regional digital industrialization.

- **On the AI-related development front,** the Chinese government has been steadily increasing policy support for AI in recent years. The Guiding Opinions on Accelerating Scenario Innovation and Advancing High-quality Economic Development through High-level Application of Artificial Intelligence clearly outline new channels for

io-based cooperation and innovation in AI. These include "encouraging local governments, state-owned enterprises, and industry leaders to promote scenario-based cooperation between supply and demand sides through mechanisms such as competitive project selection, joint innovation, and excellent scenario showcases," as well as "exploring new market-oriented cooperation models tailored to specific scenarios in areas such as business models, project procurement, and funding partnerships." Against this backdrop of accelerating AI scenario deployment, cloud marketplaces are well-positioned to become vital coordination platforms, facilitating the integration of cloud and next-generation AI technologies and enabling rapid expansion into deeply specialized industry domains.

- **From the standpoint of enterprise globalization and growth in emerging niche markets,** *the Notice from the General Office of the Ministry of Industry and Information Technology on Launching a Special Action to Support SMEs in Going Global explicitly states*: Cloud SPs are encouraged to offer high-quality cloud support for SMEs going abroad. Internet platforms, new media, and others are encouraged to leverage their strengths in branding, marketing, channels, technology, and computing power to help SMEs explore overseas markets and expand brand influence. The advantages of China Hong Kong and Macao's international service institutions should be leveraged to help SMEs expand global presence. In practice, thanks to the global infrastructure footprints of cloud computing companies, cloud marketplaces naturally serve as enabling platforms that can rapidly establish localized ecosystems in overseas markets. They help outstanding Chinese digital enterprises quickly adapt to the security and compliance requirements of targeted countries, which is critical for businesses that lack local sales or operations teams abroad.

Drivers of Enterprise Digitalization

- **For enterprises, digitalization demands, and AI trends are key drivers of cloud marketplaces growth.** Enterprise digitalization is shifting from "cloud migration" to "cloud utilization", while the AI pivot has further expanded the demands for standardized and modular cloud services. With the advantages in ecosystem integration and agile delivery, cloud marketplaces have become the core channel for enterprises to

scenarimplement digitalization. The rigid demand for enterprise digitalization lies in improved operational efficiency and cost reduction. DX drives the migration of enterprises from traditional IT architectures to cloud-native models, and cloud marketplaces provide ready-to-deploy solutions that significantly reduce self-development costs and deployment cycles. The popularization of AI technology has accelerated the dependence on the cloud ecosystem. The implementation of large models and GenAI requires the collaboration of computing power, toolchains, and data. Cloud marketplaces can provide AI infrastructure, pre-trained models, and AI application development tools in a one-stop manner. In addition, the rise of hybrid cloud and industrial solutions has also promoted the growth of cloud marketplaces. Regulated sectors such as financial and government often prefer hybrid deployments. Cloud marketplaces provide on-premises compliance solutions tailored to the unique requirements of these industries.

- **IDC research signals strong enterprise demand for purchasing cloud marketplace.** Globally, IDC data shows that 30% of enterprise cloud-related products and services spending in 2024 occurred on cloud marketplaces, significantly increased by 16.4% compared to 2023. By 2025, this spending is projected to increase by 4.97%. Regional analysis shows that North America leads with a share of 34.26%, followed by Europe at 29.11%. While Asia-Pacific currently has a lower penetration rate, it is projected to lead global growth in 2025 with a 5.14% year-on-year increase, second only to Europe.

Figure 4 Global Enterprise Cloud Marketplace Spending as a Percentage ofTotal Cloud Service Spending in 2024 and Its Increase in 2025

	Worldwide	North America	Western Europe	Asia Pacific
% of Average Spending in 2024	29.84%	34.26%	29.11%	23.90%
76-100%	5.4%	9.2%	3.8%	1.3%
51-75%	13.6%	15.3%	12.7%	11.7%
26-50%	26.0%	31.1%	23.7%	20.7%
11-25%	27.2%	21.2%	32.3%	31.3%
1-10%	20.8%	12.3%	19.2%	35.1%
0%	5.0%	10.4%	2.0%	0.0%
% Average increase in the share of spending in 2025	+4.97%	+4.51%	+5.52%	+5.14%

Source: IDC, 2025

IDC's China-specific research shows that the average share of cloud marketplace spending among Chinese enterprises is 17.02% of total cloud service expenditures, with spending highly concentrated: 71.3% of enterprises fall within the 11%–20% range. Although cloud marketplace penetration in China is lower than the global average (29.8%), growth momentum is strong: 96.7% of surveyed enterprises plan to maintain or increase their spending, with an average projected increase of 12.5%.

Figure 5 China Enterprise Cloud Marketplace Spending as a Percentage of Total Cloud Service Spending in 2024 and Its Increase in 2025

	China
% of Average Spending in 2024	17.02%
51-60%	0.7%
41-50%	0.7%
31-40%	2.7%
21-30%	14.7%
11-20%	71.3%
1-10%	10.0%
% Average increase in the share of spending in 2025	+12.5%

Source: IDC, 2025

Chapter 2

Technology Architecture and Ecosystem Logic of Cloud Marketplaces

2.1 Cloud Marketplace Technology and Ecosystem Architectures

2.2 Modes of Cloud Marketplaces

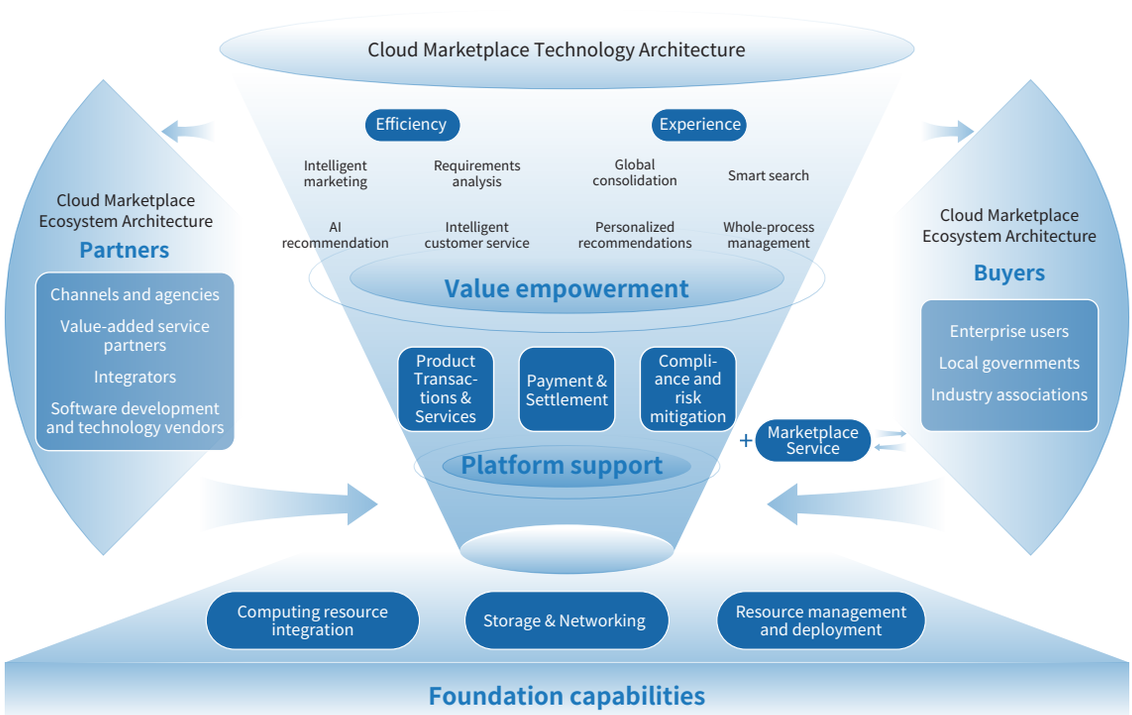
2.3 Path to Shared Value Creation

The prosperity of cloud marketplaces depends not only on business model innovation, but also on solid technological architecture support and healthy ecosystem collaboration. Through technological innovation and ecosystem collaboration, cloud marketplaces can create value for developers, partners and end users.

At the technological architecture level, cloud marketplaces ensure that related software and services can quickly reach global customers through full-stack cloud infrastructure, platform-based transaction services, and rich functional experience for customers and ecosystem partners. This ensures that software and services can quickly reach global users. At the ecosystem architecture level, cloud marketplaces build an all-win collaboration network for multiple parties, forming a sustainable platform for technological and business innovation. This dual approach enables both the scaling of ecosystem participants and the in-depth exploration of industry-specific needs, resulting in a continuous feedback loop and virtuous growth cycle.

2.1 Cloud Marketplace Technology and Ecosystem Architectures

Figure 6 Cloud Marketplace Technology and Ecosystem Architectures



Source: IDC, 2025

The Technological Architecture of Cloud Marketplaces

By adopting a layered and decoupled design, cloud marketplaces enable capabilities at each layer to be reused in a standard way and iterated rapidly. They support ecosystem partner innovation and collaborative optimization of partner enablement and user experience, fostering an efficient and intelligent operational ecosystem.

Infrastructure Layer: Building Unified Foundational Capabilities for Cloud Marketplace Products

This layer provides basic technology support and diversified resource packaging capabilities for cloud marketplace products, as well as reusable, standardized cloud components. The key functions include:

- **Computing resource integration services:** For example, this layer integrates services such as virtual machines, containers, and serverless services to support lightweight deployment, resilient scaling, and consumption-based billing, to meet the needs of various business use cases.
- **Storage and network services:** It packages object storage, block storage, file storage, and virtual private cloud (VPC) to enable high-availability, low-latency data access and network segmentation.
- **Resource management and deployment services:** The unified cloud resource management supports resource orchestration, rapid deployment, and dynamic scaling of cloud products. Modular, scalable infrastructure is leveraged to provide a stable technology foundation for applications.

Platform Layer: Supporting Transactions and Operations

A one-stop platform supports the diversified transaction processes and the long-term and sustainable operation of cloud marketplaces, ensuring efficient collaboration between supply and demand sides. Its key features include:

- **Product and service transactions:** This layer provides product listing, contract management, order management and other functions the whole process required, supporting multiple transaction modes such as subscriptions and pay-as-you-go.
- **Payment and settlement:** It provides automated online billing which can generate bills in real time/near real time. It supports integration with multiple channels, revenue sharing, and invoice management.
- **Compliance and risk mitigation:** It provides data security auditing, permission management, and basic transaction dispute resolution mechanisms to ensure the compliant platform operation and stable execution of cloud marketplaces' business logic.

Value Layer:Enhancing Partner Efficiency and User Experience

Partner efficiency enhancement: Various tools are used to help ecosystem partners accurately acquire customers and optimize development and operation behaviors, while further strengthening ecosystem collaboration. Core functions include:

- **Intelligent marketing tools:** Various marketing tools are available to enhance product exposure, auto-generate marketing content, and deliver targeted ads, ensuring efficient management of marketing activities.
- **User demand analysis and insights:** User behavior and market data is analyzed to efficiently identify user needs, offering insights analysis on trend prediction and customer portraits.
- **AI recommendation:** AI is used to analyze users' search content and recommend highly matched products and associated products, aiming to boost the conversion rate and the average order value.
- **Intelligent customer service:** Service levels are improved through intelligent tools like AI assistants and knowledge bases driven by retrieval-augmented generation (RAG), reducing pre-sales and post-sales support costs for ecosystem partners.

User experience refinement: This layer enables users to continuously leverage cloud capabilities to empower enterprise innovation. A one-stop service experience will be delivered, improving satisfaction through interactive access and personalized service recommendations. Kay features include:

- **Holistic integration:** It provides integrated architectural references from the perspective of enterprise leaders (CPO, CTO/CIO, CEO), aligned with industry trends to guide business innovation efforts.
- **Intelligent search and filtering:** For example, it enables interactive, multi-dimensional product filtering through natural language queries for rapid identification of target offerings.
- **Personalized recommendations:** It delivers tailored solutions based on users' historical behavior and preferences, with strong support for ongoing engagement throughout the sales process.
- **End-to-end management:** It offers capabilities for process monitoring, configuration, and service management across the sales lifecycle. This feature simplifies operations, ensures timely response to user needs, and lowers usage barriers.

The Ecosystem Architecture of Cloud Marketplaces

The ecosystem architecture of cloud marketplaces involves two-way collaboration between the partner ecosystem and the user ecosystem. The partner ecosystem primarily contributes technical and service value, leveraging specialized capabilities to integrate cloud resources and meet the digital-intelligent transformation needs of industry-specific scenarios. The user ecosystem, composed mainly of enterprise business and IT teams, focuses on industry trends, customized solutions, and enhanced intelligent experiences, with strong expectations for efficient integration of platform tools and cloud resources. Through cloud marketplaces, these two ecosystems can coordinate and interact, effectively unlocking the full-stack value of cloud services.

Partner Ecosystem: Technology Collaboration and Business Co-Prosperity

The partner ecosystem of cloud marketplaces mainly includes:

- **Software development and technology vendors:** As the primary participants in cloud marketplaces, they mainly provide full-stack software products based on SaaS and some hardware products. Some suppliers also offer integrated industry-specific solutions.
- **Value-added service partners:** They can provide services tailored to enterprise needs, such as consulting, design, delivery, training, certification, O&M, and migration.
- **Integrators:** They cater to the large-scale system integration needs of mid- and large-sized enterprises and complete the customized integration of enterprise business systems.
- **Channels and agents:** Continuously expand customer bases in regional and vertical markets, particularly helping a large number of SMEs solve early-stage technical and market challenges during cloud adoption, thereby increasing cloud vendors' market share.

The partner ecosystem plays a strategically vital role in the prosperity of cloud marketplaces. With broad industry coverage and accumulated expertise, these partners can co-create joint solutions with cloud vendors and integrate with cloud marketplaces in various forms, encouraging enterprise customers to actively participate in cloud marketplaces. More importantly, partners and platforms can mutually reinforce each other in areas such as customer outreach, brand building, and joint marketing, driving sustained commercial prosperity of cloud marketplaces.

Buyer Ecosystem: Deep Business Integration and Co-Creation of Use cases

Cloud marketplaces' user ecosystem consists primarily of enterprise users with highly diverse needs. Medium and large enterprises typically have sizable and experienced business and IT teams. They often require hybrid cloud solutions for large-scale IT projects

and focus on platform-level and systematic support capabilities. Decision-makers and managers at various levels hope to leverage cloud construction to drive innovation and generate new growth. SMEs, on the other hand, focus more on standardized, low-cost, and fast cloud adoption to build efficient operations tailored to their needs.

- **Driving effect of leading enterprises:** The user ecosystem is often led by regional and industry authorities and leading enterprises. Those enterprises seek industrial and supply chain cooperation through ecosystem alliances, potentially resulting in procurement behaviors within cloud marketplaces.
- **Stimulation of collaboration demand:** Based on industry chain collaboration requirements, enterprises choose cloud products and services tailored to specific business scenarios and may even use cloud marketplaces to promote digital collaboration across the value chain.
- **Co-creation of industry scenarios:** Through platform-based communication and collaboration mechanisms, users can submit demands, share use cases, and promote the design and listing of cloud products for professional, industry-specific scenarios.

In addition, driven by needs from the user ecosystem, cloud marketplace services are emerging as a new service model. Cloud vendors cooperate with regional and industry leaders to build regional and industry-specific cloud marketplaces that are connected with general cloud marketplaces. These specialized cloud marketplaces help drive industrial clustering, shape distinctive digital economy value chains, and foster a more specialized ecosystem of software services.

2.2 Modes of Cloud Marketplaces

Globally and in China, cloud marketplaces typically operate under two models: a product-based (application-centric) model and a service-based model.

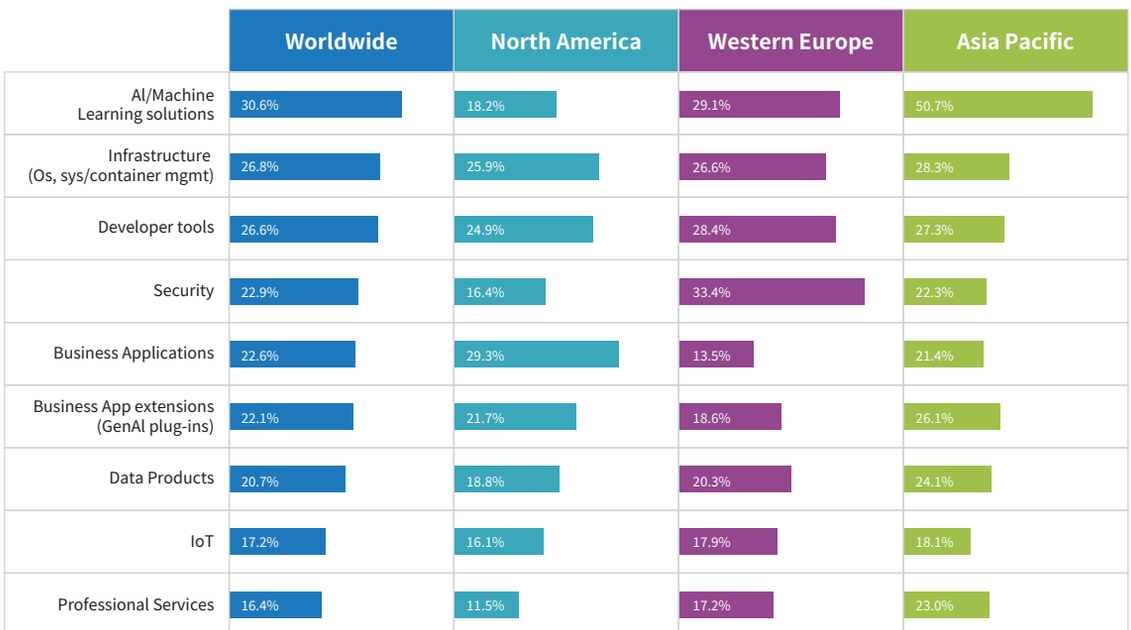
Global—SaaS-based products and standardized services: According to IDC research, global cloud marketplaces primarily feature a wide range of SaaS-based general-purpose

and industry-specific products, including foundational products, general tools, security solutions, and business intelligence. These platforms operate with mature systems, with a platform-centric ecosystem. By integrating cloud infrastructure with third-party software and services, they provide one-stop B2B digital solutions for enterprises. In serving enterprise users, global cloud marketplaces effectively aggregate IaaS and PaaS resources along with SaaS applications, AI models, and industry solutions, forming standardized service catalogs. This allows users to purchase and use services either on a pay-as-you-go or subscription basis.

China—diversified product delivery and more customized services: Due to factors such as related procurement processes and habits, customers in the Chinese market prefer face-to-face communication and expect software SPs to accommodate more customized needs during professional pre-sales services. The reason is mainly:

- **Procurement compliance requirements:** In China, one-time purchase (buyout) models are still dominant in cloud software procurement. This is largely due to project management practices, auditing needs, and security/compliance constraints on the customer side.
- **Preferred on-premises deployment:** Customers' perception of software assets makes them more inclined toward private deployment. As a result, software delivery methods in China are diverse, and enterprise requirements are significantly complex. Compared to global markets, standardized SaaS offerings face greater barriers to adoption. The "offline delivery + customized services" model remains mainstream in China.

Figure 7 Major Types of Applications/Products/Services Purchased by Global Enterprise Users via Cloud Marketplaces



Source: IDC, 2025

IDC research data shows that 16.4% of global respondents have purchased professional services on cloud marketplaces, while in Asia, the figure rises to 23%, highlighting stronger service reliance among Asian.

It is worth mentioning that as China's digital economy accelerates, cloud marketplaces not only offer general and customized services but has developed a unique service model called Marketplace Service, enabled by the platform's expanding capabilities.

- **Background of marketplace services:** In China's enterprise DX journey, the transaction layer between capability supply and demand is critical. There is an urgent need for a professional, open, and compliant matchmaking platform, which creates the necessary conditions for the value extension of cloud marketplaces.
- **Forms of marketplace services:** In response to local and industry development demands, cloud SPs jointly build regional or industry-specific marketplaces with regional and industry authorities based on cloud marketplaces. These marketplaces integrate representative software developers, systems integrators, and consulting SPs

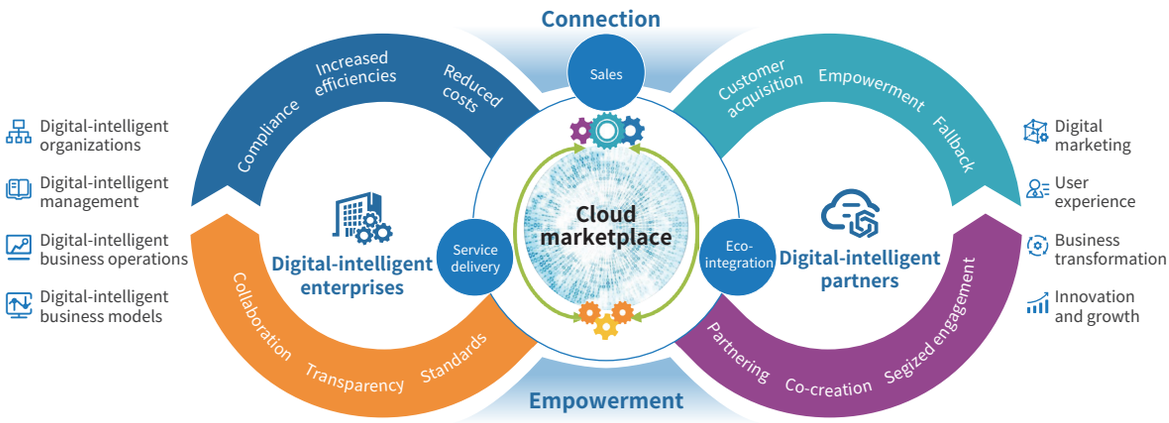
in relevant regions and domains to make cloud services better match the needs of specific fields, while still sharing the resources in the global ecosystem.

- **Core features of marketplace services:** Marketplace services are highly open and designed around enterprise procurement workflows. They address information asymmetry between suppliers and buyers and enhance transactional convenience. These platforms reflect the pipeline value of B2B operations by offering timely access to the latest digital resources and expanding software vendors' influence, thereby helping industry users make more accurate solution choices. Additionally, Marketplace services demonstrate sufficient professionalism in managing the complexities of enterprise software transactions, such as corporate payment processing, billing management, and contract administration. They help enterprises to integrate procurement, management, and utilization and have become an important pillar for regional industrial development.

2.3 Path to Shared Value Creation

At present, enterprises are entering a deep stage of digital-intelligent transformation. As the central hubs connecting enterprise customers and ecosystem service partners, cloud marketplaces are reshaping the core logic of enterprise digital-intelligent transformation by introducing two key drivers of the value chain: digital-intelligent enterprises and digital-intelligent partners.

Figure 8 Dual Engines of the Cloud Marketplace Value Chain



Source：IDC，2025

Cloud marketplaces are not only product trading platforms but also acceleration engines to empower ecosystems. Through resource integration and value co-creation, it enables ecosystem partners and customers to collaboratively evolve around shared innovation goals. Therefore, the dual engines of the cloud marketplace value chain not merely serve as a means of connecting resources but generate a flywheel effect through data-driven operations, shared capabilities, and co-created value. This contributes to a large-scale cloud software ecosystem and serves as a core platform for enterprise digital innovation.

Serving Digital-intelligent Enterprises: From Cost Reduction and Efficiency Gains to Innovation-Driven Growth

The key value of cloud marketplaces to customers lies in helping enterprises optimize their enterprise structures, management processes, and business operations through its three-fold approach of cost reduction, efficiency improvement, and compliance assurance. Cloud marketplaces have built a new model for intelligent procurement, delivering revolutionary experience in enterprise cloud software procurement through three key actions: cost optimization, process efficiency enhancement, and process compliance.

- **Cost optimization:** Aggregates a vast array of supplier resources, helping customers reduce procurement costs through centralized purchasing and bidding mechanisms.
- **Process efficiency enhancement:** Provides end-to-end automation tools covering selection, price comparison, contract signing, and deployment, shortening procurement cycles from months to just days.
- **Process compliance:** Features a comprehensive supplier onboarding and product certification system to ensure all listed products comply with national, regional, and enterprise regulations.

These actions create a transparent and controllable cloud software product procurement and service process for customers, continuously enhancing the cloud marketplaces' comprehensive service quality, and delivering the following expected results:

- **Transaction standardization:** Achieves standardized procurement processes and continuously improves service standards, including but not limited to clarifying key indicators such as delivery processes, SLAs, failure response times, and recovery point objectives.
- **Process transparency:** Ensures full visibility and traceability across the procurement chain, with key stages monitored by multiple stakeholders.
- **Service collaboration:** All parties involved in the procurement and service behaviors can obtain optimal workflows through the cloud marketplaces' "AI + collaboration mechanism", especially improving efficiency and experience in complex multi-vendor, multi-product scenarios.

Through all-win cooperation, cloud marketplaces can drive customers to achieve transformation across four critical areas:

- **Digital-intelligent organizations:** Builds enterprises into digital organizations in line with their innovation strategies using general-purpose cloud software products in cloud marketplaces, forming data-driven, efficient, and collaborative working models.

- **Digital-intelligent management:** Offers deeply industry-aware digital management tools through co-innovation, enabling real-time monitoring, precise forecasting, and dynamic resource optimization to enhance transparency and risk response.
- **Digital-intelligent business operations:** Fully empowers enterprise operations with "AI+", and strengthens core links such as production, supply chain, sales, and service through intelligent analysis and decision-making to realize sustainable and efficient operations.
- **Digital-intelligent business models:** Leverages cloud marketplace alliances and ecosystem resources to create new business logic centered on data-driven, intelligent decision-making and automated execution, unlocking new opportunities in fields like AI e-commerce, smart homes, and connected vehicles.

Empowering Partners in the Digital-Intelligent Ecosystem: From "Expanding Sales Channels" to "Participating in Ecosystem Co-Growth"

The value of cloud marketplaces to ecosystem partners is reflected in helping partners break through capability bottlenecks through comprehensive digital-intelligent empowerment and achieving capability enhancement, product iteration, and business model innovation through the power of ecosystem collaboration. Cloud marketplaces inject growth momentum into partners by leveraging its market influence, supporting broad customer acquisition, targeted enablement, and service assurance, thereby helping them build a sustainable growth engine.

- **Broad customer acquisition:** Utilizes cloud marketplaces' traffic and the technical and brand strength of cloud platforms to help partners reach a broader customer base, with big data driving more precise exposure and significantly improving conversion rates

- **Targeted enablement:** In response to ecosystem partners' technical and operational gaps, cloud marketplaces can help partner enterprises continuously improve their solution capabilities for key industries through the joint innovation mechanism. It also helps enterprises achieve rapid growth at low costs by opening tool platforms and service interfaces to enterprises.

- **Service assurance:** Cloud marketplaces work with partners to build a service capability matrix, integrating partners' capabilities into a standardized service process system. This ensures service quality throughout the service process by unleashing vendors' potential and leveraging robust cloud platforms.

Through its tri-force engine of Partnering, Co-creation, and Synergized Engagement with ecosystem partners, cloud marketplaces further dismantle the trust barriers between bilateral and multilateral stakeholders, catalyzing self-sustaining collaborative dynamics that radiate from within partner enterprises.

- **Partnering:** Co-launch products with cloud marketplaces to achieve strategic binding sales benefits and share customer information and market operation data to lead contractual revenue-sharing ratios on joint offerings.

- **Co-creation:** Jointly invest capital, people, and market resources with cloud marketplaces (or other partners) to develop new products and joint sales.

- **Synergized engagement:** Based on data analysis, cloud marketplaces identify new market demands and convenes cross-sector partners for industry-specific solutions and joint sales of multi-partner products.

Cloud marketplaces can help ecosystem partners comprehensively improve their production and operational activities, transforming from single-point capabilities to comprehensive ecosystem-embedded growth, and help partners upgrade their four capabilities:

- **Digital marketing:** With its online influence and powerful marketplace marketing strategies, cloud marketplaces make it easier for partners to get more benefits from the marketing process by leveraging the power of digital collaboration.

- **Customer experience:** Supported by a mature customer service system, cloud marketplaces can improve service levels of partners, standardize service activities, and provide customers with service experience more than expected with controllable costs.
- **Business transformation:** cloud marketplaces have accumulated a wealth of industry practice knowledge and typical use cases, which is conducive for partners to expanding the depth of the industry and transforming from a single product-oriented enterprise to a solution-oriented service enterprise.
- **Innovative growth:** With mature market mechanism and ecosystem-driven effect, cloud marketplaces enable partners to develop more value-added services and cultivate a new growth curve.

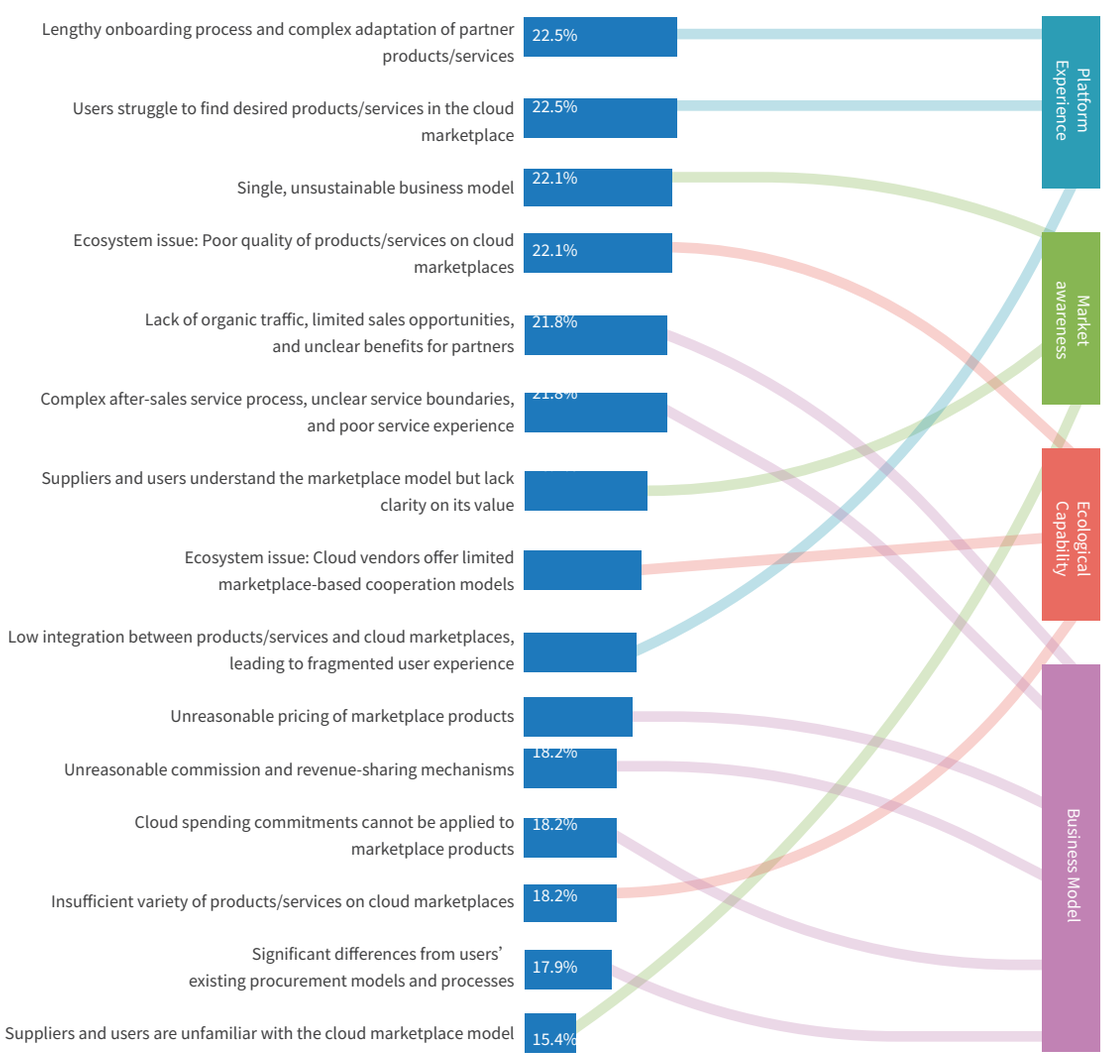
Chapter 3

Cloud Marketplaces Implementation and Development

3.1 Barriers and Pain Points in the Development of China's Cloud Marketplaces

China's cloud marketplaces are still affected by multiple factors, including the overall market landscape, technological ecosystem, and business models, requiring the joint efforts of multiple parties to break through development bottlenecks and achieve leapfrog development. According to IDC's survey, the platform experience, market perception, ecosystem capabilities, and business models rank among the main factors hindering the further development and widespread adoption of cloud marketplaces.

Figure 9 The most prominent factors hindering the further development and widespread adoption of cloud marketplaces



Source: IDC, 2025

- **Platform experience - Tedious listing process, complex adaptation process and difficult retrieval.** The listing standards for partner products/services are not clear, the adaptation process is complex, and the pricing and billing mechanisms for products are not good enough. At the same time, due to innovative mechanisms and predictable returns, the types and quantities of China cloud marketplaces are still not rich, while the taxonomy is not very clear, making it difficult for users to quickly find the products/services they need. In addition, the integration of cloud platforms with related products/services is generally not effective, resulting in fragmented user experience.

- **Market perception - Single business models and deficient value delivery.** For the cloud software procurement practices today in China, customers generally choose a perpetual license because thay need to consider their customer project management, auditing, security compliance requirements, etc. Customers' entrenched perception of software leads to chasing privatized deployment, which prevents SaaS services from gaining scalable market support, making the business model unsustainable. Meanwhile, many vendors and users do not understand the cloud marketplace model, or cannot further realize its value even if they know it.

- **Ecosystem capabilities - Monolithic cooperation models, and insufficient ecosystem partners and coordination.** China cloud vendors often lack strength in both internal and external collaboration with monolithic cooperation models, and the technological integration of ecosystem partners and cloud platforms is often limited to the IaaS level, leading to limited variety in third-party cloud products/services, insufficiently attractive performance, technological advancement, and availability, lax review of some products and defective functionalities and quality.

- **Business models – Insufficient incremental benefits, lack of cooperation and trust.** Currently, organic traffic to cloud marketplaces is insufficient in China, resulting in limited sales opportunities and incremental revenue for partners. There is a lack of trust between parties involved in transactions to cloud marketplaces. Competition for profits between sales teams of cloud vendors and ecosystem partners is common, and customers lack confidence in the delivery and after-sales processes after making

purchases through cloud marketplaces. At the same time, the marketplaces pursue revenue by extracting transaction commissions and launching proprietary and associated products, and the commission ratio of some transactions is too high. Additionally, the customer procurement models and processes are quite different from existing models, and the pricing of many products in the store is also unreasonable for various reasons, which greatly affects customers' decision-making.

In addition to these major influencing factors, the quality and control of product delivery, after-sales, and marketing have a negative impact on the development of cloud marketplaces.

- **Product delivery – Lack of quality control for third-party services.** Currently, cloud marketplaces have gaps in effective overseeing the delivery processes of third-party partners, for example, in the processes of SaaS product deployment, customized development, or system integration, partners may delay delivery due to insufficient technological capabilities or personnel shortages or even provide functions that do not meet requirements. Cloud marketplaces usually engage with a limited number of steps such as acceptance, failing to track the progress of projects and provide risk warning in real time.

- **After-sales assurance – Ticketing slowing responses.** The questions summitted by users in after-sales stage need to go through the cloud marketplaces, cloud vendors, and partners as a ticket, resulting in long response cycles, some of which may even last more than two weeks, or repeated actions in the process due to incomplete information transmission2. At the same time, cloud marketplaces often lack assessment and supervision mechanisms for the after-sales process of partners, resulting in low service capabilities of partner enterprises and directly affecting the user experience of cloud marketplaces.

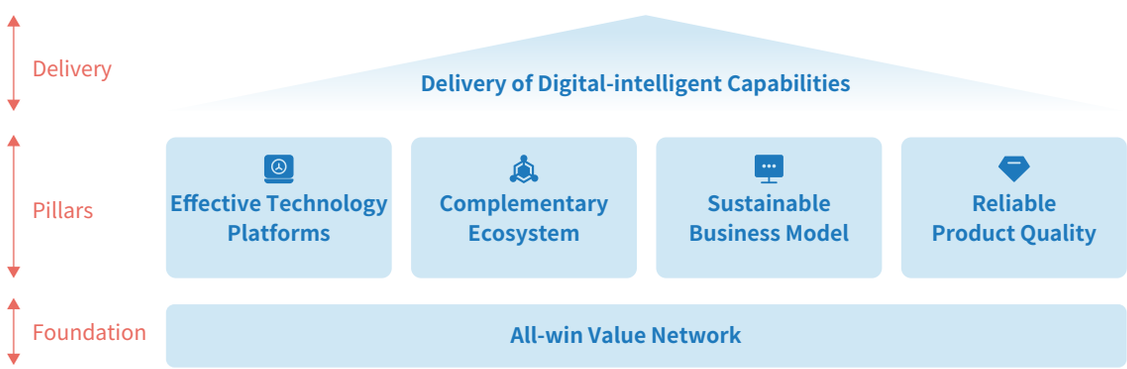
- **Marketing – Resource imbalance and conflicts of interest.** Some cloud marketplaces are clearly inclined towards proprietary products in terms of investment in marketing resources, and give them priority in search recommendations, advertising, promotions, etc. For partner products that have functions overlapping with those of propri-

etary products, it is more difficult to obtain exposure opportunities compared with proprietary products which obviously shows the conflict of interests between the two parties.

3.2 Key Pillars of Successful Implementation

The maturity and steady implementation of the cloud marketplace business will depend on a value foundation that is mutually beneficial for all stakeholders. Ultimately, its goal is to create user-oriented digital-intelligent service and delivery capabilities. There are four key pillars in this process: technologies, ecosystem, business models, and quality.

Figure 10 Key Pillars in Driving Development of Cloud Marketplaces



Source: IDC, 2025

Effective Technology Platforms

Main indicator: Deep integration of innovative products with cloud infrastructure. Cloud marketplaces provide intelligent tools across all stages, covering the entire lifetime of partner development, user procurement, delivery, and O&M.

Key Features:

- **Cloud native integration:** Cloud products are entirely cloud-native by design and fully integrated into technology stacks of cloud vendors, leveraging cloud vendors' technologies and platform services such as containers, service monitoring, DevOps, and serverless to improve business performance, resilient expansion, and dynamic resource optimization.
- **Intelligent tool chain:** They provide AI-enabled development, testing, delivery, and O&M tools, such as low-code, one-click deployment, and predictive maintenance tools. On the other hand, they can optimize the capabilities of intelligent recommendation, decision-making and service supervision based on procurement and transaction actions.
- **Developer-friendly:** They continuously build an interactive development environment to lower the development threshold and even enable line-of-business personnel to build prototypes with low-code or zero-code tools. A variety of SDKs and APIs are available for development partners and customers to quickly integrate the marketplace into their own services. Platforms such as developer communities are used to encourage developers to exchange development experiences and jointly innovate products.

Complementary Ecosystem

Main indicator: Diverse suppliers (ISVs, developers, and SPs) are brought together to address users' digital needs from products, services to solutions, enabling capability interoperability and complementarity.

Key Features:

- **Vertical coverage:** Professional ISVs and system integrators are cultivated and supported for key industries to discover in-depth needs of industries and widely address the Digital-intelligent needs in the vertical industries through industry-specific solutions. Cloud marketplaces have industry-focused sections to professionally taxonomy partner products and improve user search efficiency.

- **Ecosystem complementarity:** Cloud marketplace-listed companies create close information and service connections, and the marketplace enables a mutual referral network between enterprises, products, and services by leveraging AI, big data, and other technologies, empowering some emerging products to quickly get competitive edge and create more sustainable market opportunities by using value-added services.
- **Channel collaboration:** Cloud vendors and its ecosystem partners share sales channels through cloud marketplaces to strengthen the mutual reinforcement effect and jointly scale up the market.

Sustainable Business Model

Main indicator: Diversified market strategies, trading rules and revenue-sharing structure are established to dynamically balance the interests of platforms, partners and users, achieving long-term value sharing.

Key Features:

- **Diversified revenue model:** Marketplaces can realize revenue through revenue split, partnering, co-creation, value-added services, and data analysis services. Users and partners can choose one-time purchase, subscription, pay-as-you-go, or large-scale project cooperation to complete transactions.
- **Flexible payment:** Based on transaction type and service delivery, users can choose one-time payment, phased payment, and installment payment to reduce the financial pressure of all parties on the premise of meeting procurement compliance. For cross-border transactions, it provides cross-border payment and multi-currency settlement services.
- **Co-creation and win-win strategies:** For example, establishing development alliances tailored to industry-specific needs, jointly investing development funds and market resources as agreed, and sharing intellectual property and market benefits.

Reliable Product Quality

Quality, as the value intersection of market experience and enterprise capabilities, is reflected in cloud marketplaces as whether it can accurately address customer expectations with stable and reliable service capabilities. The essence of this bidirectional value transfer requires cloud marketplaces simultaneously improve the "internal forces" and optimize the "external skills" - that is, by strengthening the internal capabilities to build the foundation and relying on the excellent experience to boost the brand, to create a closed loop of quality improvement - "capabilities→ experience → capabilities".

Main indicator: A high-quality cloud marketplace is established, and it forms a two-dimensional interaction between market experience and internal capabilities to ensure the reliability of products and services, and to win user trust with systematic support capabilities.

Key Features:

- **Cultivating internal forces to build a verifiable service capability system:** The marketplace forges solid product and service capabilities internally to meet the high-level needs of high-end customers and continue to drive internal iteration based on market feedback. The high-quality operations of cloud marketplaces depend on the co-evolution of enterprises, processes, strategies, and technologies: at the enterprise level, cross-functional agile teams need to be established to ensure the efficient alignment between the decision-making chain and the execution chain; at the process level, a closed loop of quality control needs to be created through standardized service publishing audit and dynamic health assessment; at the strategy design level, a hierarchical operation mechanism is adopted to achieve accurate assignment of ecosystem resources. Finally, quality control will be part of the marketplace through continuous upgrading of the technology foundation, including a smart contract-driven automated settlement system and AI-enabled vulnerability scanning tools.

- **Creating external skills to build a perceptible experience value chain:** Cloud marketplaces' external skills training is focused on the brand awareness, and collaborative optimization of enterprise experience and partner experience. At the brand awareness level, a cloud marketplace needs to develop into a trusted one-stop marketplace which can capturing mindshare through establishing clear value propositions and communicating typical cases; at the enterprise experience level, key indicators such as procurement efficiency and repurchase rate need to be improved by using use case-specific solution lists and full-chain services; at the partner experience level, the publishing cycle of ecosystem partners needs to be shortened through intelligent cooperation portals, automated revenue-sharing and settlement systems, and joint marketing resource packages to create a value symbiosis of "marketplace-partners-customers".

The successful implementation of cloud marketplaces requires the assembly of the elements mentioned above, such as deep integration with cloud infrastructure, aggregation of multiple capabilities, building a revenue-sharing mechanism, and continuous creation of high-quality services for a triple-win situation for users, partners, and marketplaces to ultimately jointly complete the delivery of user-oriented digital-intelligent capabilities and accelerate the digital-intelligent transformation and development of enterprises.

3.3 Best Practices and Development Paths

Cloud marketplaces' resource integration, technological empowerment, and ecosystem synergies have strongly driven cloud software development and industrial innovation activities, added new value into enterprise customers' businesses, industrial ecosystems, and local development, and become a key force in the development of local digital economy.

Use Cases

Table 1 Use Cases by Industries

industries	Use cases	Types of application	Benefits
Manufacturing	Industrial component design	Industrial 3D design and development	Improved compatibility, lower O&M costs, and a strong big data exchange capability
	Automated equipment inspection and maintenance	AI cloud intelligent control	Powerful AI capabilities, security, energy saving and carbon reduction
	Integrated operations management and control	Integrated enterprise operation and management	Centralized control, integration of business and finance, and collaboration across production, supply and sales
Education	Teaching & Training Environment	Integration of teaching and training	Kinds of courseware management, convenient online experiments, and rich project training
	Teaching management	Cloud teaching platform	Online integration of pre-class, in-class, and after-school management, precision education, and personalized education
Governance	Urban Management with "Single-screen overview of everything"	Data resource management and visualization	Rapid launch, powerful features, and data fusion applications
	Video management and analytics	Video Cloud	Rapid launch, on-demand use, improved operational efficiencies and lowered costs
	Optimization of public service efficiencies	Government procurement and bidding platforms (such as China Government Procurement Website) and open platforms for public data	Improved transparency of public resource allocation, reduced corruption risks, and reduced administrative costs
	Regulatory and compliance support	Tracking transaction behaviors with platform data (e.g. ride hailing platforms assisting with traffic management)	Improving capabilities in industry supervision, supporting tax collection and management, and maintaining market order
	Regional economic balance	Connecting remote areas with national markets (e.g. Pinduoduo’s Rural Support Program, and cross-border e-commerce)	Narrowing the gap between urban and rural areas and promoting economic growth in underdeveloped regions
	Green & Sustainability	Carbon trading markets, and energy sharing platforms (e.g. electricity trading platforms)	Supporting the goals of carbon neutrality, promoting the popularization of renewable energies, and optimizing energy structure

Source: IDC, Huawei, 2025

Best Practices

Smart Education

Increasingly diversified and complex teaching needs cause tremendous urgency for educational to improve the management efficiencies across teaching resources, promoting efficient internal collaboration, and continuously optimizing usage of existing hardware resources, so as to "fully tap the potential and make the best use of materials".

Wuhan Zaofengzhe Education Technology Co., Ltd. has launched their Zaofengzhe Teaching Sandbox Experimental Platform - Standard Version on KooGallery, to provide multiple course modules for various teaching institutions, enriching teaching content, and meeting diversified and complex teaching needs. At the same time, the platform's back-end management system enable efficient management across courses, experiments, sandbox instances, and images, and its underlying virtualization management platform can virtualize users' server resources and build sandbox instances, so that hardware resources can be optimally utilized.

Chongqing College of International Business and Economics procured the platform services above through Huawei KooGallery, including courses, HarmonyOS Ark TS and training platform courses, and related application development practices. The rapid delivery of related services enabled the diversification of teaching content. The back-end management system has greatly improved management efficiencies, including efficient managing more than 1,000 sandbox instanc1000es in just one semester. The college's hardware resources were effectively utilized thanks to its virtualization management platform, with 30% higher hardware utilization.

Smart Governance

In the process of driving the development of Smart City and City Brain, cities generally have common problems such as insufficient integration and sharing of data resources, gaps in city data analysis capabilities, lower application integration, and weak "perception" capabilities in city management.

Beijing Digital Hail Information Technology Co., Ltd. has launched their Visual Application platform on KooGallery, to solve the difficulties, blockages, pain points and blind spots in city management with intelligent early warning functions and advanced Internet of Things devices, achieving closed-loop management from early warning to disposal. It helps implement digital governance with cutting-edge technologies such as big data, cloud computing, and artificial intelligence, enabling the digitization to the next level in a comprehensive and intelligent way. A single dashboard integrated with measures in various fields provides visual management for all hardware, technologies, and human resources of governments at all levels. In addition, it can also analyze the location and event characteristics of security incidents and predict potential risks by using video surveillance and intelligent algorithms.

In the process of building a new smart city, Karamay City happened to activate and start using this platform on KooGallery, and after experience, it was found that the product well solved their current pain points, reflecting a remarkable trial success. The currency of information was greatly improved; the efficiency of incident handling was increased by 23%; the productivity of employees was increased by 30%, and the human cost of statistical analysis was reduced by 50%. Meanwhile, the platform helped users transform from reactive disposal to proactive finding, which was expected to improve city management efficiencies by 25% and reduce public safety incidents by 30%.

Smart Manufacturing

Enterprises in the field of smart manufacturing have a wide variety of 3D design needs, hoping to be able to easily design and modify model files in different formats. Their requirements for software format compatibility and data integrity are getting higher, and they also need to continuously improve the design efficiencies of some complex component models.

ZWsoft has launched ZW3D Design Software on KooGallery, which has good format compatibility, and can directly open models generated by other software without affecting the integrity of the data. It allows engineers to directly edit and modify existing models. Moreover, ZW3D is flexible in the creation of engineering features, further improving design efficiencies.

In 2023, Highpower Technology purchased this platform on KooGallery. After several months of in-depth interaction with ZWsoft and product implementation, the company found that this platform can replace 3D design software from oversee vendors, the powerful data exchange enables the data exchange with its customers and suppliers, the html format, especially, can be used to view the 3D structure with ordinary browses, and peers who have not installed 3D software can also intuitively understand the product - bringing great convenience to them. Upon delivery, the overall software procurement cost was reduced by 60%, the sheet metal design efficiency was increased by 40%, and the reusability rate of old image files reached 80%.

Table 2 Generic Enterprise Use Cases

	Use cases	Types of application	Benefits
Generic use cases	Business intelligence (BI)	BI application	Paperless operations, open data, improved analysis efficiency, and decision-making support
	3D design and rendering	Cloud-enabled workstations	Higher computing power, on-demand use, security control, and improved efficiencies
	Data management, exchange, analysis, services	Enterprise data lake	Breaking the data silos, tapping into the value of data, and leveraging the latest data model outcomes
	Smart Marketing	Smart marketing management cloud platform	Improved business efficiencies, efficiently managed dealers, reinforced direct-managed devices, and accurately reaching users
	Business intelligence monitoring and content management	Enterprise one-stop Information management platform	Insights into market information in a timely manner, overseeing supplier status, monitoring release content, and protecting enterprise security

Source: IDC, Huawei, 2025

Generic Use Case: Operations Management

At present, many enterprises are still using traditional modes to manage important business elements including talent, projects, suppliers, costs, processes, etc. With the development and growth of business, traditional methods can no longer meet the needs of business and management, resulting in serious bottlenecks in internal management and business collaboration.

Seeyon has launched Seeyon A8 on KooGallery, which enables to build a collaborative operation system based on Huawei Cloud to achieve an integrated business manage-

ment system covering intelligent travel management, digital procurement management, and administrative and HR management by using its low-code capabilities, promoting new standards of enterprise operations, improving operation management and efficiencies, and enhancing the competitiveness of enterprises.

Shenzhen Ruiyuan Precision Industry Co., Ltd. has long been using traditional paper documents for management, with its overall capabilities and efficiencies falling short of the company's developmental demands. After activating the Seeyon A8 platform on KooGallery, a series of efficiency problems in talent management, cost control, process efficiency, supplier services, quality management, and project management and control were comprehensively solved. As a result, the timely rate of travel expense reimbursement was increased by 70%, the on-time delivery rate of suppliers was increased by 50%, and the project progress quality management was increased by 60%.

Generic Use Case: Marketing Management

Due to the local climate, geographical environment, product characteristics and other factors, Kunming Xuelan Milk Co., Ltd. (Xuelan) has extremely strict requirements for its overall marketing and supply channels. However, there were many noticeable pain points in the company's traditional manual-led channel marketing management, such as guaranteeing employee productivity, standardizing distribution management system, getting insights from endpoint information, and reaching targeted users.

After investigating the current situation of Xuelan and verifying the programs for this company, the digital team of Huawei Cloud recommended Omni-Channel Smart Marketing Management Cloud Platform launched by Xuanwu Cloud on KooGallery. Focusing on its core needs in four major marketing segments: business visits, distribution management, endpoint management, and user reach, the digital team built core functional components for salesperson management, dealer management, endpoint management, and user reach, to meet the company's requirements to manage and control the end-to-end marketing chain from brand owners and distributors to endpoints, covering the full lifetime and all touchpoints. This directly improved overall

business efficiencies, upgraded the dealer management model, greatly strengthened the ability of direct control of endpoints, and achieved accurate user reach. Upon delivery, the platform reduced the cost of salesperson management, activity expenses, and endpoint management by about 20-30%, improved general management staff efficiencies by 50%, and increased channel orders and endpoint sales by 10-20%.

Table 3 International Use Cases

	Use cases	Types of application	Benefits
Global	Software globalization	Data analysis, video cloud, general enterprise management, etc	Reaching international customers in an all-round way, and building convenient cooperation channels

Source: IDC, Huawei, 2025

International Markets

Traditional video security systems lack intelligent inspection capabilities and cannot centrally manage very diverse monitoring equipment brands. Users often lack a unified video cloud platform, failing to receive video cloud services, and resulting in extremely low utilization of video surveillance data.

Based on the B2B use case, the Denghong Video Cloud platform launched on KooGallery provides enterprises unified and centralized control of devices to enable internal management at low cost. Users can remotely inspect the security situation through video to improve the efficiency of inspections. At the same time, its powerful intelligent analysis capabilities can align and configure AI algorithms with customer needs to efficiently analyze and utilize video data. In addition, the platform can build a resource sharing mechanism of video data, which greatly improves resource utilization.

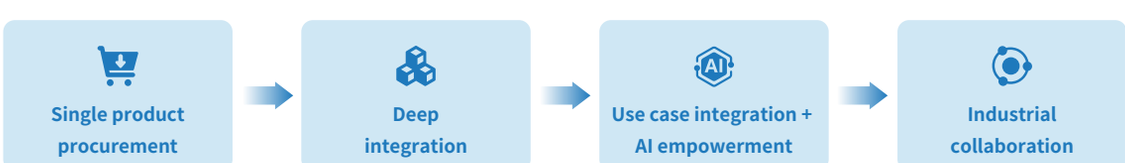
At the end of October 2022, Ethiopian 10Telecom started the partnership with Denghong through KooGallery. Based on Denghong Video Cloud, Ethiopia Telecom launched a cloud service called Telecloud, which focuses on customers with higher data storage needs. Ethiopian Telecom's goal is to shift revenue from traditional streaming to value-added and content-driven services by introducing new digital solutions. According to preliminary data, the service can reduce user storage costs by 30%, increase management efficiency by 25%, increase video retrieval efficiency by 30%, and increase video utilization rate by 30%.

Implementation Paths

In the development of cloud marketplace-related industries, enterprises, ecosystem partners, and local/industry governors need to focus on the dynamics of the industries and maximize the value of empowerment and innovation of cloud marketplaces through rational development paths and solid, effective market-oriented practices.

For Enterprises/Customers: from Product Procurement to In-depth Empowerment

To meet their business growth and innovation needs, enterprise customers can engage with cloud marketplaces starting with individual trials, gradually deepening their adoption in a phased and progressive way.



- **Individual product procurement:** Enterprises can quickly access software that is mainly in standard SaaS, such as ERP, CRM, and enterprise mailboxes through a cloud marketplace. Most of these procurements are concentrated in SMEs (Small and Medium-Sized Enterprises) and start-ups, focused on rapid procurement, fast launch, and pay-as-you-go (including billed by usage and pay-by-time), with a simple and clear process and basically no customization requirements.

- **In-depth integration:** When enterprises experience the significant advantages of cloud marketplaces and establish clear business goals, they can continuously improve in-depth integration capabilities which should involve customized development and data and service integration with existing systems. This kind of procurement is usually conducted digitally or physically by large and medium-sized enterprises with certain industry experience.

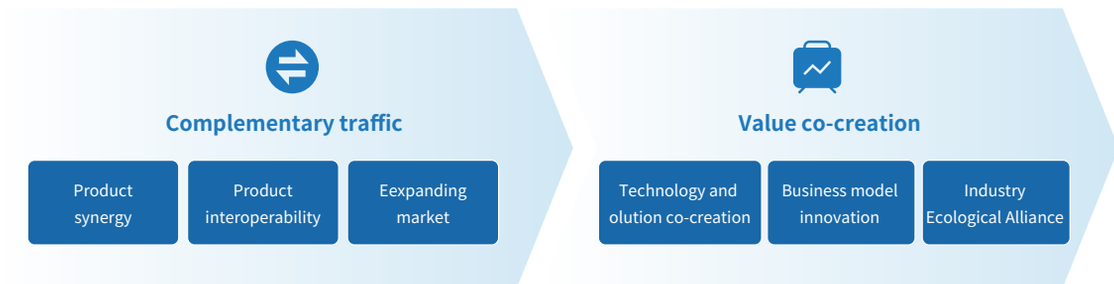
- **Integration of use cases and AI empowerment:** When enterprises establish higher business innovation goals and require a certain degree of customization, they can jointly innovate products by further using cloud marketplaces to integrate cloud products into their business processes. Especially in the current AI era, innovation-driven enterprises hope to access advanced AI models, platforms, and data services from cloud marketplaces to drive intelligent transformation and AI-native application development, enabling business and operation model innovation.

- **Industry collaboration:** Finally, exceptional digital-intelligent enterprises can connect upstream and downstream enterprises by using a cloud marketplace, accessing the latest industry innovations, and jointly promote the development of their own industries through data sharing and industry chain collaboration.

In summary, enterprise customers can realize more agile product iteration and ecosystem cooperation through cloud marketplaces, enabling them to keep a close eye on cutting-edge innovation trends and accelerating the process of improving operational efficiencies, lowering costs and business innovation.

Industry Ecosystem Partners: from Traffic Complementation to Value Co-creation

Most importantly, cloud marketplaces provide ecosystem partners with a platform that makes them complementary in traffic, enabling enterprises and platforms to empower each other through shared and reciprocal traffic flows and maximize the potential of high-value traffic.



- **Industry depth:** All partners in the same industry can jointly address large-scale solution requirements and establish process-oriented product synergy based on a unified cloud foundation.
- **Industry breadth:** Partners in different industries can use a combination of general products and Focused products for cross-promotion.
- **Regionals and areas:** Cloud marketplaces enable ecosystem partners to reach users nationwide and even globally, which is conducive to partners' expansion into new markets at low cost.

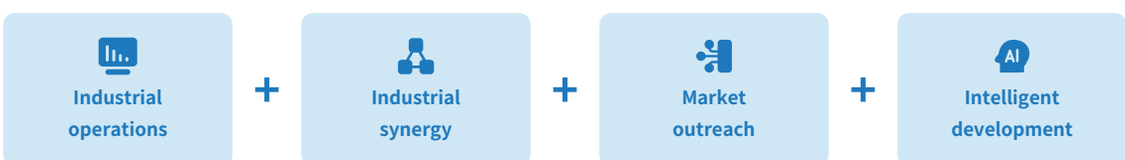
Cloud vendors can establish long-term cooperation with partners through a cloud marketplace. Cloud vendors can continuously improve their basic computing power, network, security, and compliance experience, while ecosystem partners can leverage their in-depth understanding of the industry to continuously optimize and integrate cloud resources, drive cloud sales at scale, and create a "1+1>2" synergy. IDC's research finds that the synergy effect of leading vendors will be more obvious, mainly due to their strong product capabilities, market size and comprehensive service capabilities, creating more incremental value to cloud marketplaces and cloud vendors.

- **Technology and jointly innovated solutions:** To meet large-scale and complex business needs, cloud vendors can integrate new technologies in different fields (including AI, cloud native, serverless, etc.), and use a marketplace to integrate heterogeneous cloud and edge computing power to connect cross-domain networks and jointly innovate systematic solutions with partners.
- **Business model innovation:** Cloud marketplaces can be used to support the innovation of business cooperation models. For example, implementing partnering and co-creation, introducing more flexible contracting, improving settlement processes and models with cloud vendors, and enabling more flexible revenue-sharing models aligned with the expansion difficulty and value potential of customers.
- **Industry ecosystem alliances:** Cloud marketplaces can help partners build industry ecosystem alliances, jointly formulate technology standards, and further promote the development of industry at scale.

Local/Industry Governors：Marketplace Services Create New Energy for the Digital Industry

The marketplace service model has special development advantages in this digital economy era. Local and industry authorities can introduce relevant incentive policies, financial mechanisms and talent introduction programs according to local conditions, and build exclusive trading environments with the capacity spillover of general cloud marketplace platforms, driving further development of digitalization in their local industries, upgrading existing industries and continuously cultivating new types of industry.

As a new driver supporting industrial development, the marketplace service can create new energy for digital development across regions and industries.



- **Empowering industrial operations:** Through partnering and co-creation with cloud vendors, operators can obtain specialized marketplace service operating capabilities, including centralized product selection, resource sharing, and access to more value-added services from general cloud marketplaces.
- **Closer industry collaboration:** Marketplace services for specific fields is conducive to accelerating the pace of cloud migration by upstream and downstream enterprises in the industry chain, so that the entire industry can benefit from efficient collaboration.
- **Market outreach:** Leading enterprises in the marketplace service field can reach other industries or regions through general cloud marketplaces. For example, AI vision applications for mine production safety can be adapted and expanded to industries such as power and energy.
- **Intelligence development:** In the AI boom era, general cloud marketplaces can allocate and obtain AI computing power, components, and algorithm models on a larger scale to fuel specific marketplace services with AI and ensure continuous AI innovation practices at lower costs.

Chapter 4

Future Outlook

4.1 Future Evolution Directions

4.2 Key Recommendations

4.1 Future Evolution Directions

In response to the global wave of GenAI, cloud marketplaces are evolving from software trading platforms into intelligent ecosystem aggregation platforms. Cloud marketplaces will be deeply integrated with AI, hybrid cloud, cloud native, and other technologies to further optimize computing power scheduling, cross-cloud collaboration, and security compliance capabilities, and continuously improve the penetration rate in vertical sectors such as government, manufacturing, and healthcare through innovative business models, attracting more participants and creating diversified use case solutions.

Technology Dimension: Cloud marketplaces in the AI Era

With the evolution of the new wave of AI driven by Generative AI (GenAI) technologies, AI and cloud marketplaces are poised to demonstrate a mutually empowering dynamic. Cloud marketplaces will integrate an increasing number of AI elements, continually penetrating vertical industries with AI services, thereby providing a more scalable commercial environment for the implementation of AI.

- **AI-fueled products driving enterprise intelligent upgrades:** Relying on the systematic innovation of "intelligent computing power + large models + industry agents", more and more AI-native products will be introduced to the market to support the automated perception, analysis, and decision-making use cases in enterprise operations, and provide rich intelligent experience for key points such as safety production, quality inspection, after-sales, and operations.
- **Deep integration of AI with industries:** Enterprises will increasingly anticipate that AI innovations will drive deep collaboration between cloud marketplaces and vertical ISVs, integrating GenAI with cloud computing power, edge computing power, and intelligent sensors, to offer extensively integrated solutions for end-to-end internal operations and external procurement, supplying and sales partners, for example, developing predictive maintenance mechanisms for production equipment, establishing intelligent supply chain management systems, and incorporating intelligent simulation and decision-making.

On the other hand, the introduction of GenAI can redefine the underlying technological logic of cloud marketplace platforms, enabling the demand collection, analysis, recommendation, and execution processes of the platform in a more intelligent way, and contributing to the development of industry chain and agglomeration effect of industries, to enable cloud marketplaces to evolve from a resource distribution platform to an industry-driven platform for driving the implementation of digital economies in various regions.

- **Enabling intelligent recommendation and automated deployment experience:** Utilize AI to analyze the context of enterprise operations and historical usage data and, combined with current requirement inputs, recommend highly matched and compatible solutions and software products, along with automated deployment tools that can significantly shorten deployment and delivery cycles, to address enterprises' ultimate pursuit for agility.
- **Ecosystem integration and industry agglomeration:** Use the AI matching to connect upstream and downstream enterprises, increasingly facilitating innovation collaboration between digital enterprises and industry customers, for a more complete innovation ecosystem chain. At the same time, it is necessary to introduce enterprises in data, algorithm, and application fields which are highly related to the industry based on the results of AI-based demand analysis to guide the creation of a digital industry agglomeration effect in the local area by using the epitaxial effect of cloud marketplaces.

Ecosystem Dimension: An Open Ecosystem with a cloud marketplace as the Value Center

Clarify the Value System of Ecosystem Partners

- **Clearer and more open positioning of cloud SPs:** These SPs are more focused on expanding the market and overall improving ecosystem value by opening technologies, customer resources, and market influence on cloud marketplaces.

- **More refined division of roles and closer collaboration among cloud marketplace participants:** In addition to traditional ISVs and integrators, a cloud marketplace may include other roles such as long-term technology partners, and its value-added SPs will be more diverse. All participants make serving customers and expanding the market a shared goal, and create a dynamic revenue sharing mechanism.
- **Continuously enhancing influence on customers in depth and breadth:** Cloud marketplaces will be more global-oriented and enter more global emerging markets, enabling a large number of ecosystem enterprises to benefit from the global market. Meanwhile, the ecosystem partners will continue focusing on their industry segments, using the latest cloud and AI technologies to bind customers' strategic innovative businesses to create a bigger incremental space for cloud marketplaces.

Build Deep Cooperation around Marketplace Services

- **More granular platform services:** Currently, the entry points of this service are still focused on the macro level such as pan-government and industry. Over time, the platform services will go beyond more granular level — individual enterprises, and its connection with enterprise procurement platforms is expected to be continued. This connection will enable deeper relationships with enterprise users.
- **New revenue-sharing mechanisms:** Establishing tailored revenue-sharing models for various sub-markets within the marketplace ecosystem can foster mutual reinforcement between niche and general markets.
- **Technology cooperation and co-creation:** Standardize model invocation interface and service protocols, establish data-sharing mechanisms (covering data security, privacy protection, and intellectual property rights), and provide convenient, cross–marketplace service sub-market data access and usage services.

Industry Dimension: Synergistic Development from "Resource Integration" to "Industrial Empowerment".

- **Industry focus:** Position cloud marketplaces as a true B2B connectivity hub by fostering industry-standard practices through real-world implementation; establish dedicated industry alliance sections to develop cloud marketplaces into a one-stop enterprise procurement platform recognized by national, regional, and industry stakeholders. This will, in turn, support local investment attraction efforts and drive the flourishing development of emerging industries.
- **Industrial AI engine:** Focusing on the goal of "AI + industry", cloud marketplaces will continuously introduce full spectrum of AI capabilities to provide new driving force for the digital-intelligent development of enterprises.

4.2 Key Recommendations

For Cloud Marketplace Platform Operators

As a complex and critical initiative, the operation of a cloud marketplace should be recognized and prioritized strategically by cloud vendor management (platform owners). In operating cloud marketplaces, it is essential to allocate sufficient, skilled personnel, establish a dedicated sales team for its promotion and maintenance, and clearly define KPIs for each team member—such as customer acquisition numbers and sales growth.

- **Strengthen ecosystem development and define clear cooperation boundaries:** Operators should advance their cloud marketplaces through well-designed assessment and incentive mechanisms, following a sustainable ecosystem path to ensure its long-term stability and growth. When working with ecosystem partners, it is important to clearly define the scope of services provided by both parties. Cloud marketplaces should focus on their core businesses such as platform development, operation and promotion, and avoid getting involved in the core areas of ecosystem partners such as OEMs to seize their market share. This not only protects the interests of ecosystem partners but also creates a fair and harmonious cooperation environment and promotes the healthy development of the ecosystem.

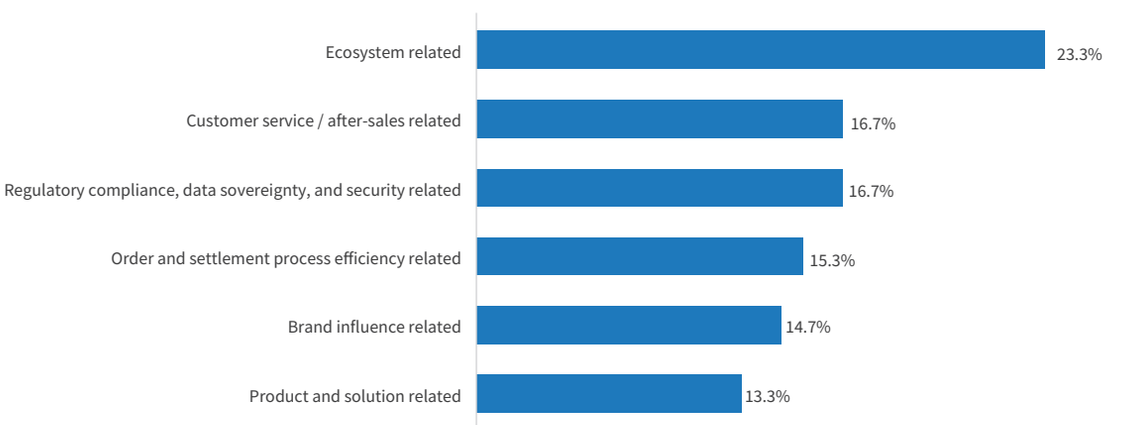
- **Optimize product selection and operation experience:** Cloud marketplaces should be committed to building a convenient, efficient, and user-friendly "store", using diversified marketing methods, such as online and offline promotional activities, precision advertising, etc., to increase product exposure and sales, and achieve value co-creation with ecosystem partners. In selecting products, it is necessary not only to pursue killer products, but also to establish a win-win mechanism, especially to think about how to bring incremental benefits to ecosystem partners, such as accurately driving customer traffic, providing broader sales channels, etc. Only by allowing ecosystem partners to obtain tangible benefits will they be more willing to publish high-quality products, rather than unsalable ones.

- **Empower ecosystem partners and create new value together:** Cloud marketplaces should empower ecosystem enterprises continuously and encourage ecosystem partners to introduce more advanced technology capabilities, such as Artificial Intelligence, 5G, and Internet of Things. Helping them enrich product functions and improve product quality can provide customers with a wider range of usable products and enhance the competitiveness of ecosystem enterprises in the market. It is necessary to help ecosystem partners integrate their products into use case-specific solutions to meet the diversified needs of different customers.

- **Maintain appropriate openness:** Cloud marketplaces should be open and actively accept all kinds of ecosystem enterprises, regardless of their size or technology strength. Industry barriers should be broken. Cooperation and communications between innovative enterprises in different fields should be encouraged to promote the integration and sharing of technology and resources. An open platform environment helps attract more high-quality resources, enrich the types of products and services on cloud marketplaces, providing users with more choices, and driving the diversified development of the ecosystem.

- **Focus on user needs:** User needs should be put first by collecting user feedback through a variety of channels, such as questionnaires, user interviews, online reviews, etc. It is important to gain an in-depth understanding of users' pain points, expectations, and changes in demand in their processes of using cloud services, and adjust the product matrix, service strategies, and functional design of cloud marketplaces in a timely manner. Operators should be guided by user needs, continuously optimize the user experience, improve user satisfaction and loyalty, and secure a competitive edge in a rapidly evolving market environment.

Figure 11 The Main Factors Influencing Enterprises' Purchase via cloud marketplaces



Source: IDC, 2025

For Enterprises

Choose a High-Quality Cloud Marketplace Using the DRIVE Model

IDC has defined the key characteristics of a high-quality cloud marketplace. Enterprise customers can carefully choose trusted cloud marketplace platform services based on relevant quality standards to provide high-standard support for enterprises' cloud-based development and innovation activities.

	Features	Notes
D	Delightful Experience	Unified, intuitive and smooth interactive experience, zero learning cost, personalized recommendations, self-service, and high overall satisfaction
R	Robust Reliability	High-availability architecture, automatic failover and fallback mechanism can ensure continuous business availability, data security, and a seamless user experience for deployed products
I	Intelligent Automation	"AI for marketplace + marketplace for AI": AI-fueled underlying platform capabilities, intelligent recommendation and resource optimization, improved performance, reduced costs, and intelligent application marketplaces
V	Value Transparency	Billing, shared rights and responsibilities, and multiple prices help optimize input-output management
E	Ecosystem Engagement	Abundant API/SDK and marketplace portals for quick access to third-party applications; joint marketing, channel distribution and revenue sharing to encourage partner participation

Source: IDC, 2025

For Ecosystem Partners

In an era of rapidly evolving digital-intelligent transformation, ecosystem enterprises must maintain keen market insight, continuously enhance their capabilities, and leverage the strong influence of cloud marketplaces to strengthen their development.

- **Continue to upgrade their capabilities, especially by leveraging AI's impact on future development:** increase investment in R&D of new technologies such as AI, train and recruit skilled talent, and integrate new technologies into product development and service optimization to provide users with more advanced and personalized products and solutions. Only by continuously advancing its own capabilities can it secure a position in fierce competition and lay a solid foundation for future development.

Figure 12 Primary Factors Influencing Enterprises' Choice of AI Solution Vendors

Source: IDC, 2025

- **Develop effective value-added services, especially innovative solutions for vertical industries:** Different vertical industries have unique needs and business characteristics, so ecosystem enterprises should gain deeper insights into the pain points of these industries and develop targeted solution templates. By thoroughly studying the business processes, data characteristics, and management needs of specific industries, ecosystem enterprises can integrate general-purpose technologies with industry-specific knowledge to develop standardized solutions tailored to real-world industry scenarios. This enables them to provide more professional and convenient value-added services to customers across different sectors and enhance their market competitiveness.

- **Optimize customer acquisition channels through cloud marketplaces:** Actively participate in programs offered by cloud marketplaces—such as Premium SPs—establish deeper collaboration with platform providers, gain access to high-quality business opportunities, and reach a broader range of potential customers. At the same time, consider publishing free tools on cloud marketplaces, which is also an attractive way to acquire customers. For example, publishing a free "Security Scanner" tool to raise awareness of security risks can not only attract potential customers, but also help enterprises build a professional image in the industry—ultimately generating more business opportunities.

- **Long-term ecological investment:** To achieve sustainable development, ecosystem-driven enterprises must commit to long-term investment. 15–20% of annual revenue can be allocated to dedicated optimization efforts for cloud marketplace integration—such as improving product adaptability to ensure seamless integration with cloud marketplace platforms and enhancing product compatibility and stability. Strengthening team training and upgrading team members' skills and business acumen will enable them to better adapt to the evolving dynamics of cloud marketplaces and strive to reach top-tier partner status with cloud vendors. This means they can gain more technical support, resources, and marketing opportunities from cloud vendors. It also helps enhance their brand awareness and industry influence, fostering sustained growth within the cloud marketplace ecosystem.

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