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InfoBrief
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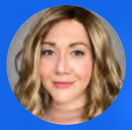
Build for What's Next: Open-Source Architecture and the Future of AI Commerce

From SaaS Lock-In to Agentic, Open, and Adaptive Platforms



Heather Hershey
Senior Research Director,
AI-Enabled Digital Commerce, IDC

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Setting the stage

Differentiation and discovery in the AI era

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Your commerce stack was **built for humans, not AI agents**

Is your brand ready for what's ahead?

Human-centric experiences

- Search isn't broken; it has evolved into an AI-powered concierge for shopping and discovery.
- Consumers are delegating more of their shopping to AI agents.

Agentic discovery and commerce

- Brands need a new strategy featuring AI agent-powered discoverability that splits into two paths: One experience for humans in the loop and another for fully agent-executed commerce.
- In either experience model: if machines can't read your content or catalog, you're not considered, you don't make the sale, and worst of all, you basically don't exist.

Agentic transition

AI will replatform $500 billion in digital spending by 2030

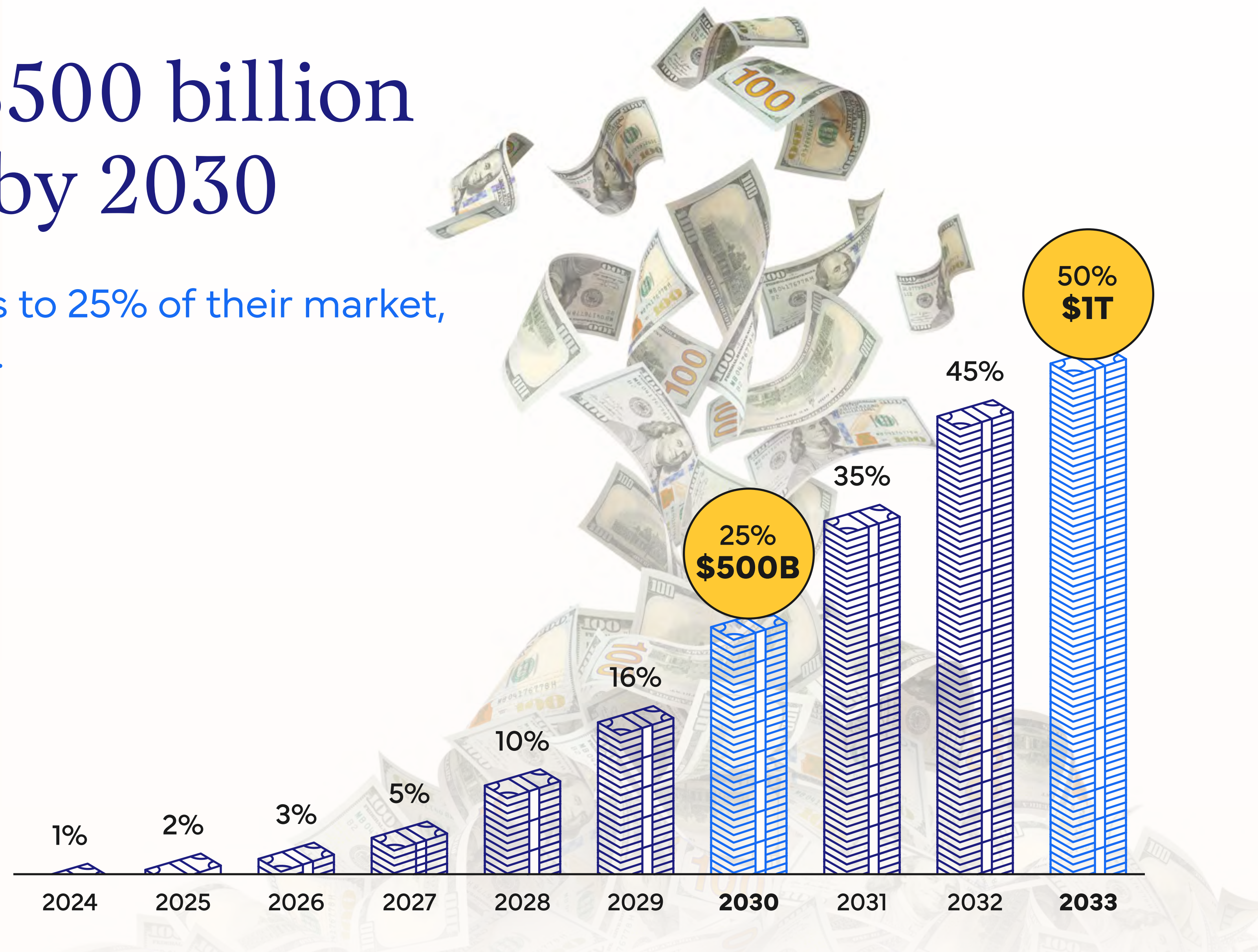
Brands that aren't ready will lose access to 25% of their market, with impacts that compound over time.

Using mobile adoption as reference:

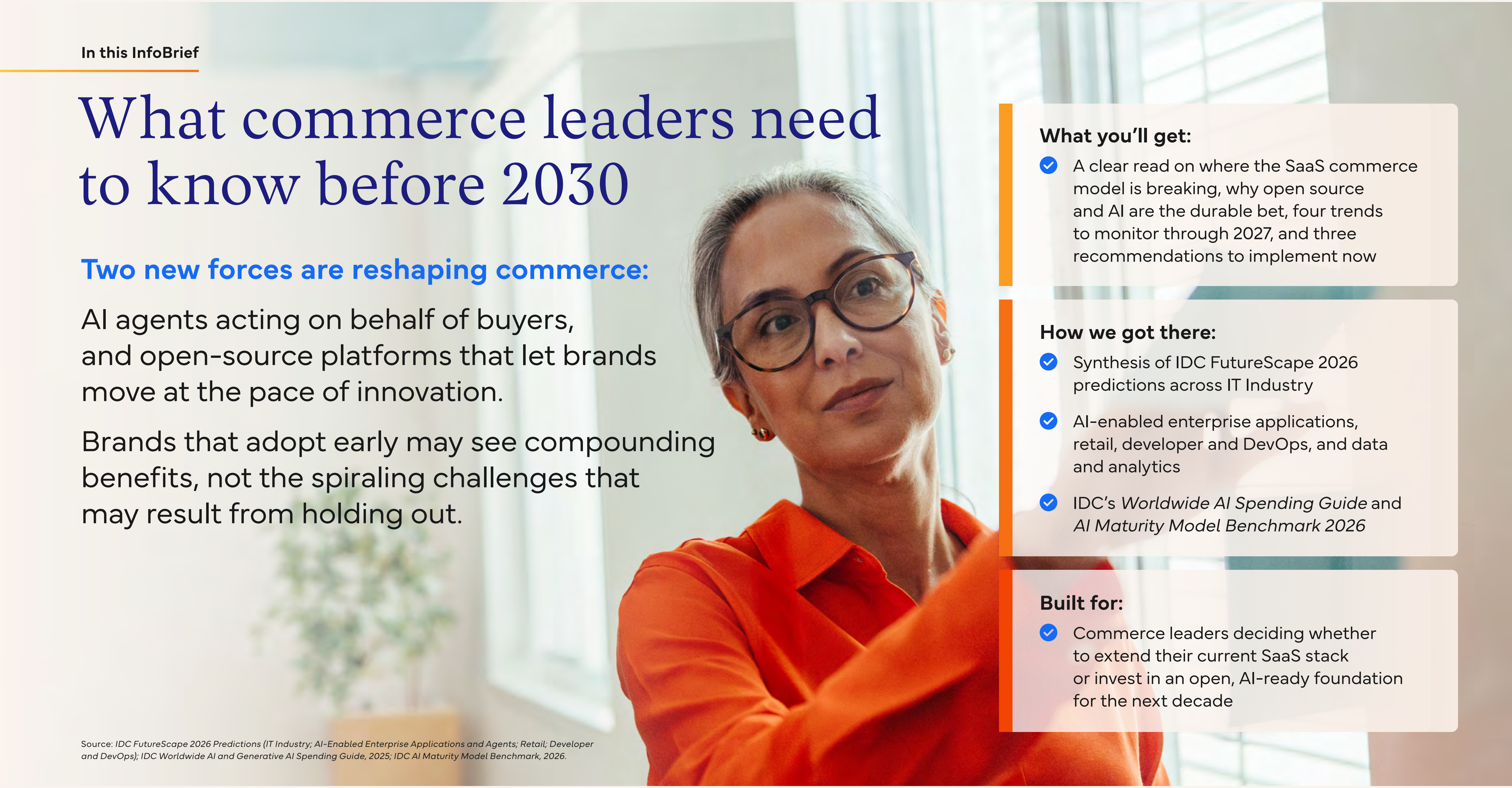
- 6–8 years to reach 25% of consumer spending on retail goods
- Half that time to reach 50%
- Both happened twice as fast in China

What will drive the agentic transition from discovery to transactions:

- Consumer behavior shift to on-device personal agents
- Buyer trust in agent security and reliability
- Seller trust in transaction infrastructure is very similar to mobile; these issues now have to be solved in the context of agentic commerce.



Source: IDC, 2026



In this InfoBrief

What commerce leaders need to know before 2030

Two new forces are reshaping commerce:

AI agents acting on behalf of buyers, and open-source platforms that let brands move at the pace of innovation.

Brands that adopt early may see compounding benefits, not the spiraling challenges that may result from holding out.

What you'll get:

- A clear read on where the SaaS commerce model is breaking, why open source and AI are the durable bet, four trends to monitor through 2027, and three recommendations to implement now

How we got there:

- Synthesis of IDC FutureScape 2026 predictions across IT Industry
- AI-enabled enterprise applications, retail, developer and DevOps, and data and analytics
- IDC's *Worldwide AI Spending Guide* and *AI Maturity Model Benchmark 2026*

Built for:

- Commerce leaders deciding whether to extend their current SaaS stack or invest in an open, AI-ready foundation for the next decade

Source: *IDC FutureScape 2026 Predictions (IT Industry; AI-Enabled Enterprise Applications and Agents; Retail; Developer and DevOps); IDC Worldwide AI and Generative AI Spending Guide, 2025; IDC AI Maturity Model Benchmark, 2026.*

Executive summary

Commerce is entering the agentic era; the SaaS platform model is breaking

Closed SaaS stacks that once promised simplicity now raise fees, throttle ecosystems, and slow the pace of AI innovation. Brands face a choice — wait for vendors to catch up, or build on open, composable foundations where AI plugs in naturally and operations unify around a single source of truth.

$632 billion
forecasted global AI spending by 2028.

45%
of organizations will orchestrate AI agents at scale by 2030.

40%+
of enterprise applications will have agentic automation by 2027.

Source: *IDC FutureScape 2026 Predictions; IDC Worldwide AI and Generative AI Spending Guide, 2025; IDC FutureScape: Worldwide Developer and DevOps 2025 — APEJ Implications*

The forces reshaping commerce

The next decade demands something different — here's why

Next-gen commerce forces

Agentic commerce
AI agents discover products and complete purchases on behalf of customers.

Hyper-personalization
Human customers expect tailored experiences, but data is fragmented across many systems.

Global and omnichannel
Commerce spans more channels, markets, and currencies.

Regulatory shifts
Data sovereignty and AI governance reshape architecture.

Source: IDC FutureScape: *Worldwide AI-Enabled Enterprise Applications and Agents 2026 Predictions*; IDC FutureScape: *Worldwide Retail 2026 Predictions*.

Where the old model breaks

The cracks in the typical SaaS commerce model

Six structural limits now constrain digital growth:

1 Vendor lock-in

Your data, your process, and your roadmap all move at your commerce vendor's speed ... not yours.

2 Data silos

Your marketing team never has a complete picture: customer, product, and order data are scattered across fragmented systems.

3 Slow innovation cycles

Release cycles are too slow and/or infrequent to keep pace with AI advancements.

4 Rigid pricing models

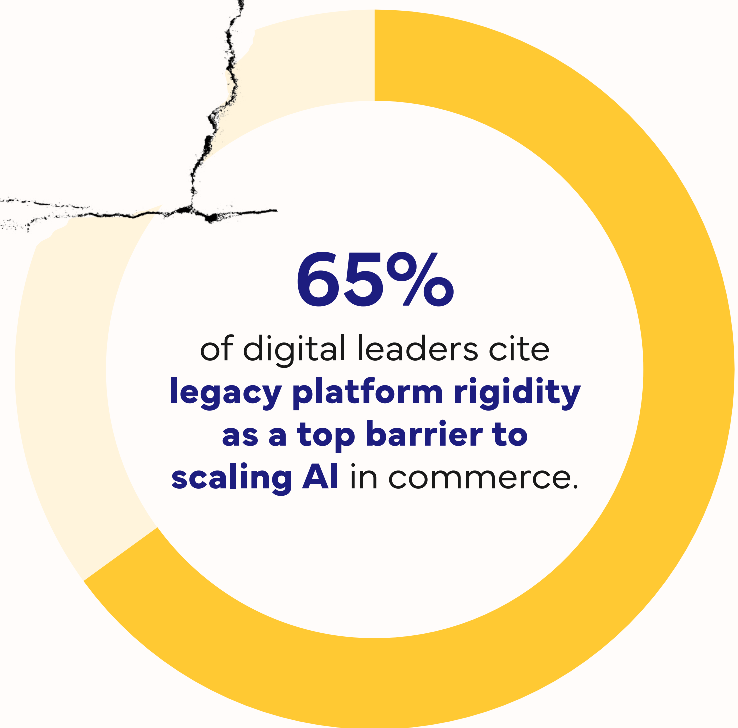
Outcome-based fees penalize growth and inflate total cost of ownership (TCO) as commerce volume scales.

5 Limited extensibility

Closed APIs and rigid data models restrict how AI agents and partners can plug in.

6 Shallow AI integration

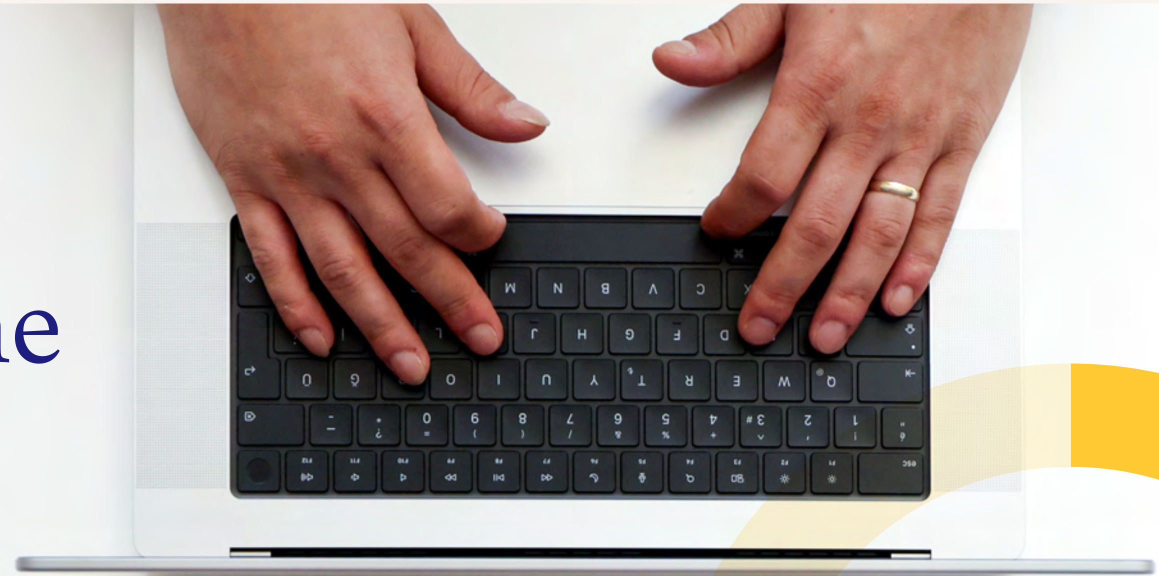
AI is mainly siloed domain-specific features, not the core of the application.



Source: *IDC FutureScape 2026 Predictions; IDC AI Maturity Model Benchmark, 2026; IDC Worldwide AI and Generative AI Spending Guide, 2025.*

Brands will own the stack

Open source: Software built in the open, owned by everyone



Open-source software exposes its source code publicly so anyone can read, modify, extend, and redistribute it. For commerce, that means brands aren't renting a platform — they own the stack, choose every component, and never pay a tax to access their own data.

60%

of organizations will build with open-source AI foundation models by 2026 — driven by the need for faster innovation, operational sovereignty, transparency, and lower costs.

Why it matters now:

- Freedom to DIY any commerce stack, including payments and search
- No vendor-imposed roadmap, fee escalations, or feature gating
- Community-driven innovation outpaces single-vendor release cycles

Source: *IDC FutureScape: Worldwide Developer and DevOps 2025 Predictions — APEJ Implications, February 2025.*

A second buyer in the journey

Agentic AI: Software that doesn't just answer — it acts

Agentic AI systems perceive context, reason about goals, and take multi-step actions on a user's behalf, from comparing products and applying discounts to completing checkout. For commerce, this means a second buyer has entered the journey, and they don't browse like a human.

10x by 2027

Projected increase in Global 2000 agent use with token and API call loads rising up to 1,000x.

40% by 2027

Agentic automation will enhance capabilities in enterprise applications.

What agentic commerce changes for brands:

- Decisions are moving from clicks to API calls and structured intent; this means that the brands who win won't be the ones with the best websites; they'll be **the ones with the most machine-readable commerce infrastructure.**
- Your product data, pricing, inventory, and policies need to be structured and exposed in a way that **enables AI agents to make a purchase without a human shopper** adding to the cart and moving through checkout.

IDC FutureScape: Worldwide IT Industry 2026 Predictions; IDC FutureScape: Worldwide AI-Enabled Enterprise Applications and Agents 2026 Predictions.

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Section 2:

Four trends to monitor in the new AI-first era of commerce

These trends separate commerce leaders from laggards

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The trends to monitor

1 Freedom versus friction

Open source removes the gatekeeper

AI advances weekly. Locked SaaS roadmaps move quarterly. Open codebases let brands integrate the newest models, agents, and protocols the day they ship without filing a feature request.

2 Two modes of consumption

AI and human experiences in parallel

Success now requires winning over two very different audiences at once: human shoppers inspired by storytelling, and AI agents that act on verifiable data.

3 Trust as infrastructure

AI speaks open source natively

Large language models are trained on open code and open standards. They build integrations, write extensions, and potentially execute API calls more reliably in open source environments than closed and opinionated commerce platforms.

4 The collapsing stack

AI eliminates the old friction tax

AI fills the gaps that used to require hand-coded logic. Open standards mean agents already speak the language with no custom translation layer required, reducing integration overhead.

Source: *IDC analysis based on FutureScape 2026 research and IDC AI Maturity Model Benchmark, 2026.*

Trend 1: Freedom versus friction

The safest decade-long bet isn't the easiest platform today — it's the most open one

Open source adapts to change

AI advances weekly. Locked SaaS roadmaps move quarterly. Open codebases let brands integrate the newest models, agents, and protocols the day they ship without filing a feature request.

SaaS lock-in may result in higher costs

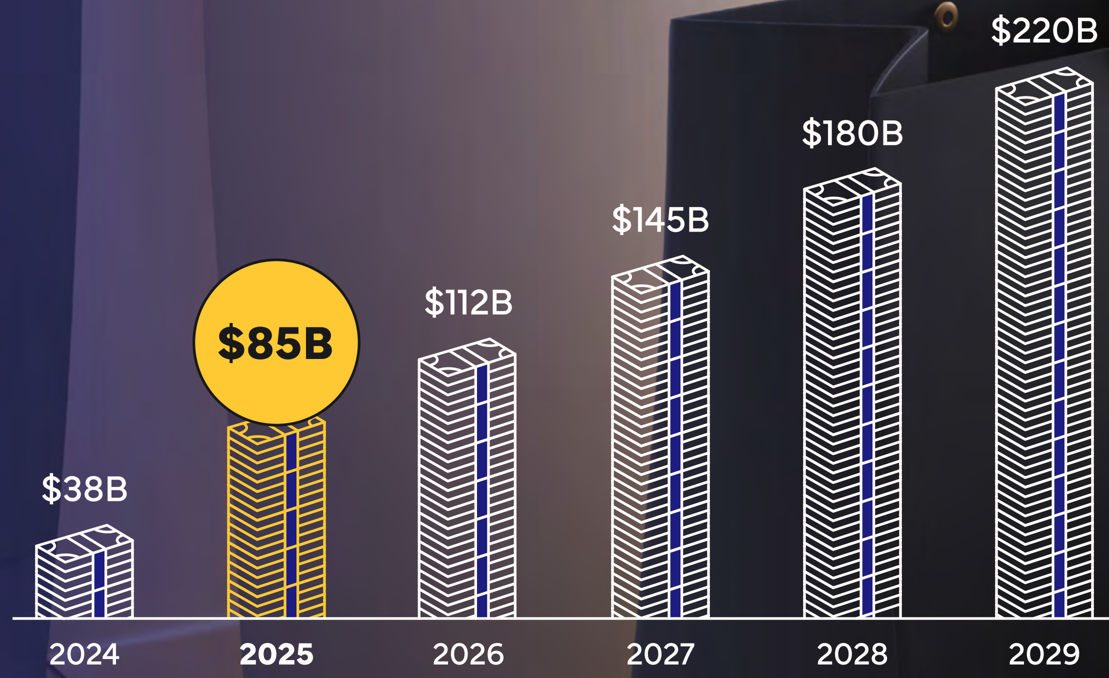
Whether or not you use new features, you may end up paying more for your commerce platform because of them. Additionally, these costs often grow over time. If the vendor uses outcome-based pricing structures, you may be penalized for success with higher fees as you grow.

Automate repetitive tasks and bridge gaps

What used to require expensive custom integration is increasingly generated and maintained by AI, flipping the old freedom-versus-friction tradeoff.

Retail industry GenAI spend, 2024–2029

(Constant value, USD, billions)



Source: *IDC Worldwide AI and Generative AI Spending Guide, 2025–2029 (31.9% CAGR). IDC FutureScape: Worldwide IT Industry 2026 Predictions.*

Trend 2: Two modes of consumption

"Get discovered" is the new "get ranked"

HUMAN buyer

Inspired by **content**

- Discovers brands through story, imagery, and community
- Falls in love at the storefront; visual brand identity matters
- Rewards transparency, social proof, and lifestyle context
- Converts when emotional fit and trust align

AGENT buyer

Acts on **intent**

- Discovers via structured catalogs and machine-readable metadata
- Evaluates data quality, not design
- Rewards clean inventory, accurate pricing, and reliable fulfillment
- Won't recommend brands it can't verify (authority comes from third-party trust signals spread across many independent sources)

Source: *IDC Research on the Agentic Buyer Lifecycle, Directions 2026; IDC FutureScape: Worldwide Retail 2026 Predictions.*

Trend 3: Trust as infrastructure

In the agent economy, your data quality is your storefront

80%

of agentic AI use cases will require real-time, contextual, and ubiquitous access to data by 2027 — making clean catalogs and live inventory non-negotiable.

50%

of enterprises will use AI agents to redefine human-machine collaboration by 2027 — agents only refer to brands they can verify structurally.

Infrastructure agents need:

Structured catalogs

Machine-readable product data, attributes, and rich metadata across every SKU.

Live, accurate inventory

Real-time stock and pricing the agent can trust before recommending or transacting.

Consistent identity

The same product story, attributes, and policies across every channel and surface.

Source: *IDC FutureScape: Worldwide Data and Analytics 2026 Predictions; IDC FutureScape 2026.*

Trend 4: The collapsing stack

From myriad data silos emerges one source of commercial truth

Marketing becomes a layer

When agents make purchase decisions before a human ever sees an ad, marketing stops being the journey and becomes metadata that feeds the decision.

Operations unify with commerce

AI now connects commerce-to-ERP integrations that once required custom work, eliminating the margin leak between front-end optimization and back-office reality.

Service runs alongside sales

Inventory levels drive recommendations. Order status drives outreach. The platform answers customers before they ask.

Decisions move into the platform

Stock levels, demand signals, and margin data feed agents that act without waiting for someone to manually check the spreadsheets.

Continuous marketing | **Commerce + ERP** | **Embedded service** | **Autonomous ops**

If not addressed:

- Margins leak between disconnected systems
- Agents lose trust in your data
- Marketing falls behind the product catalog

Source: *IDC FutureScape: Worldwide AI-Enabled Enterprise Applications and Agents 2026 Predictions; IDC MarketScape: AI-Enabled Marketing Platforms 2025.*

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Section 3:

Key takeaways and guidance

Three recommendations that prepare brands for the next decade with an open-source stack that scales

Essential guidance

Make your next move with confidence

Commerce leaders preparing for 2030 should evaluate platforms on three dimensions.

1 Choose openness over convenience

Audit your stack for lock-in fees, ecosystem restrictions, and AI capabilities gated behind premium tiers. The platform that's the easiest to start on is rarely the cheapest to grow on.

2 Build for humans and agents in parallel

Invest equally in storefront experience and machine-readable infrastructure. Structured catalogs, clean data, and live inventory are now table stakes for being recommended by AI agents.

3 Treat your platform as your AI partner

Prioritize platforms where business-critical applications unify with commerce. The brands that win in 2030 will treat their commerce platform as the orchestration layer and not just one of many tools.

Source: *IDC analysis and synthesis of FutureScape 2026 predictions across IT Industry, AI-Enabled Enterprise Applications, Retail, and Data and Analytics.*

About the IDC analyst

Heather Hershey
Senior Research Director,
AI-Enabled Digital Commerce, IDC

Heather Hershey is senior research director for IDC's Worldwide Digital Commerce practice. Hershey's core research coverage includes digital commerce applications targeting businesses of all sizes and industries (B2C, B2B, B2B2C); product information management and syndication applications; commerce personalization, search, and merchandising applications; CPQ and order management applications; digital marketplaces; headless digital commerce; enterprise partnership/integration strategies among digital commerce, supply chain, marketing, and content management vendors; commerce experience management across channels; digital shelf trends; and AI-enabled or intelligent commerce.

More about Heather Hershey →

Message from the sponsor

Open-source commerce: Built for what comes next

WooCommerce is the open-source ecommerce platform built on WordPress, powering more than 4 million stores worldwide. Its open architecture gives brands full ownership of their store, data, and roadmap — with the flexibility to integrate any AI tool, payment provider, or agent protocol as the commerce landscape evolves.

WooCommerce is a launch partner for Stripe's Agentic Commerce Suite and one of the first platforms to ship native Model Context Protocol (MCP) support. They're actively building the infrastructure brands need to excel in AI-driven commerce, from structured product catalogs to agent-ready checkout.

Learn how to prepare your store for AI-driven commerce

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