Further, over half of the industry respondents predict increased investment in open source within their companies over the next three years. Established carrier incumbents, who have successfully delivered significant profits and a decade's worth of strong growth however, may be reluctant to change business models for fear of substantial revenue loss and fear of losing control over access to products and services through their network portals.

Nearly 60 percent of industry executives surveyed agreed that the future of mobile will be driven by open content and mobile software application providers. However, application development by its very nature substantially outpaces network build-out. This, combined with the Federal Communication Commission's recently proposed net neutrality guidelines, increases both the importance and the perceived risk of investment in next-generation networks.

While almost two-thirds of the survey respondents believe that open access regulations will accelerate the commoditization of U.S. wireless network carriers, companies that focus too narrowly on regulatory issues as the key catalyst for change may in fact miss the real market opportunities being driven by open platforms and technologies. The regulatory debate, while important and in need of refinement, is not the end game. In fact, keeping network access, devices and services tightly controlled, and retaining as much as possible current proprietary business models, ranked the lowest in terms of opportunities for network carriers to sustain their competitive advantage.

In order to execute a strategy for migrating to an open mobile business model, organizations will require a range of capabilities including ecosystem building, platform development, effective partnering with third parties, understanding customer needs and effectively managing intellectual property. Among survey respondents who self-assessed their organization's capabilities, those capabilities that rated the strongest included:

- Providing strong internal support for research and development
- Partnering effectively with suppliers and competitors
- Developing a deep understanding of customer needs

Conversely, those capabilities that posed the biggest challenges for survey respondents included:

- Building trust with developers
- Developing distributed networks of partners and developers
- Managing intellectual property

For more information about these and other findings from *The democratization of wireless: Assessing the impact of open mobile* survey or the accompanying report *The promise of open mobile: Capturing value in a brave new world*, please contact:

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