

## The WAP Game

by

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Britain has a very healthy computer games sector: as Jack Schofield recently pointed out, exports of leisure software exceed those of television programmes or films. Now there may be a number of different reasons why Britain has more game development studios than the rest of Europe put together, but the best one that I've heard is that it's down to the legacy of the Sinclair Spectrum. In the early 1980s, American teenagers were taking delivery of Apples and IBM PCs, stuffed full of memory, with colour monitors and full-sized keyboards attached: I can well remember the excitement of buying a hard disk drive for my Apple IIe in California back in the mid-1980s. Meanwhile, their counterparts on this side of the Atlantic were just getting their hands on the Sinclair spectrum. It had a keyboard that you could hardly type on, cassette tapes for storage, a limited display (it was your TV) and a little memory. Not the best possible environment for games development, you might think. The machine, however, tapped into an incredible dynamic. By giving hundreds of thousands of inquisitive teenagers a machine that they could finally program themselves, no matter how difficult and how frustrating that programming was, the Spectrum unleashed a wave of creativity. The limited computing environment meant that creativity and ingenuity were channelled into the games themselves and not solely into the presentation. The result was an entire generation skilled at executing novel and creative concepts in resource constrained environments. The beginnings of a whole new creative industry was a device with a keyboard that it's difficult to type on, little memory, limited processing power and a display you wouldn't want to look at for any length of time: sounds like a WAP phone to me.

To read the press recently, you'd think that WAP (the Wireless Application Protocol) was a cure for cancer. It's going to transform our lives in incredible ways: we'll be able read the CNN news headlines whilst waiting for a train at Waterloo, for example. WAP is certainly an important technology. Gartner Group predict that 95% of all phones sold in 2004 will be WAP-enabled. Forrester forecast that at the end of 2003, when European mobile phone penetration will be around 59% overall, Internet-enabled mobile phones (which may or may not be WAP phones) will have a 45% penetration. Yet the current WAP frenzy suggests that some organisations are allowing their marketing departments to float free from their technological moorings. As I heard someone comment a short while ago, marketing departments are crazy about WAP because they don't understand it. It's the first step on the road to a mobile future: it doesn't pretend to be the "Internet on your mobile phone". The technology platform of both the handsets and the networks isn't really capable of supporting the functionality required to meet that goal. Even though (in time) the arrival of high bandwidth networks (eg, GPRS) will alleviate some of the problems, the form factor (and use of) handsets makes the idea of web browsing walking down the street with a WAP phone pretty unattractive .

It might be heretical to say so, but WAP has its limitations. Yet it must be a key element of organisational strategies towards mobile communications not because it is the end game but because it provides an immediate entry to the world of mobile partnerships, business models, regulation and so on. The real significance of WAP, however, may be

that it will tap into the same dynamic that the Spectrum did. Given that just one of the UK mobile operators (BT Cellnet) is planning to put some half a million handsets into the market over the summer, the user pool is set to grow quickly. We will soon be in a situation where a large number of innovative people (with time their hands), who think differently and bring a new approach, will move into an environment that had previously been closed to them but is now opening up. It may not be as open as the computer games environment was, but there are clear opportunities. If the Spectrum analogy has anything to it, it means that a new value chain will rapidly come into existence. WAP development studios will be springing up all over the place and vying for the attention of a small number of major "publishers" that dominate the delivery channels (ie, the mobile operators and major WAP portals such as, perhaps, banks). Who knows? Perhaps a decade from now Britain will have a third of the world market for software development for mobile services and there will be a couple of hundred mobile software development shops up and down the country. They'll be staffed by people who can still remember the day when they got their first pre-paid WAP phone, connected to some boring news feed site, then hung up and thought to themselves "I can do better than that".

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