

TELEMATICS AND NEW TECHNOLOGIES COMMISSION REPORT

The Growing "Net" Worth of French

For those Americans who cannot breathe without someone to hate, France will always be a backward third world country, filled with convenient fodder for racist stereotyping.

The rest of us might actually experience an attitudinal shift from a dose of reality. For instance, it is time to replace the 1980s stereotypical image of the Frenchman in Paris hunched over his Minitel terminal keyboard, messaging or playing an on-line game with someone in ... Now wait just a second here!!

I thought this time travel thing was supposed to catch the French in some kind of culturally quaint, if not luddite pastime. How could they be messaging and playing on-line games in the 1980s. It was not until the mid-1990s that many of us in the U.S. became thunderous warriors for primitive TDome.

It's time for "Net History 101." We need to know something about the French and network computing. Plans for the Minitel system as a low-cost terminal associated with an electronic telephone directory service, were announced by Gérard Thery, General Director for Telecommunications, in February of 1979 and tested in Saint-Malo in July 1980. By March 1981, the French were putting a newspaper on-line, *Le Parisien Libéré*, though the formal launch of Minitel was in 1982. By 1985, the French on-line gaming system, Funitel, was already averaging 100,000 users per month.

Systran has been available on the French Minitel network since 1988. Minitel had a reasonably intelligent search engine and message boards, could make train and airline reservations, check stock prices, do mail-order retail. In its heyday, the old Minitel system had over 14 million subscribers (about a quarter of the French population) and 25 million users (43% of the French population) in the mid- to late 1990s. Connection rate at that time was stable at around 100 million users per month with 150 million on-line telephone directory inquiries. France was the world's most wired nation. Of course, the Minitel model was not adopted elsewhere, in spite of its British Telecom partner, Prestel.

The Minitel technology did not have the desired expandability for growth in international markets. Furthermore, its unit pricing was all wrong for customer bases used to working with cable TV pricing. France, where many small businesses had grown up around Minitel, experienced its own dot-com bubble burst and became temporarily isolated while they adapted. Because of the success of Minitel and the attachment the French had for it, France did not join the Internet revolution in the same way that other countries did. In the heyday of dial-up con-

nections the state-owned telecommunications industry was slow to create a segue from the Minitel rates system and could not make rates attractive enough to grow a solid customer base. During this period of adjustment, other areas of the Francophone world were not standing still. In 1998, Quebec, with less than 6% of the Francophone population, hosted over 30% of the French language Web content.

Don't count the French out yet. The number of French speakers logging on to the Internet grew by 200% between 2000 and 2005. In 2005, French-language Internet content put French in third position after English and German. France is now cited among "Superstars of the Mobile Internet" by the World Summit on the Information Society, because it is ranked second in the number of people who use their mobile phones (or mobile networks) to download entertainment, exchange picture messages, and access the Internet. No surprise that the country which invented the smart card and revolutionized cellular communications with their GSM system should become leaders in ultra-portable hand-held Internet evolution.

According to the comScore Networks Mobile Tracking Study (October 2006) as reported by the Center for Media Research, 28% of France's on-line population accesses the Web from mobile phones. That is about 50% higher than the U.S. France is ahead of the U.S. in another and very basic aspect of Internet use. In the latest statistics from the Organization for Economic Co-Operation and Development (December 2006), France moved ahead of the U.S. in terms of broadband penetration. This report indicates that five of the fourteen top countries for "broadband subscribers per 100 inhabitants" have French as an official language. With over 16,000 wireless access points in France, it currently ranks sixth worldwide for the number of WiFi hotspots. In 2005, at 29 hours and 43 minutes spent on-line per month for the average user, the French ranked third behind Australians and Brazilians in this category. Current estimates run as high as 40 hours per month.

For a while, on-line Internet retailing in France lagged behind many of the Internet-connected countries. However, growth of on-line sales for 2005 was 44%. 2006 was also a big year for on-line sales, which, from 16,000+ points of sale (Web sites), grew by over 33% to 9.3 billion euros, according to the conservative Benchmark Group study reported in the April 2007 issue of *L'Économiste*. Moreover, *Ecommerce Digest* states that in 2004, 14% of all French retail sales were by e-business, and estimates for

2007 are for continued on-line sales growth of 25%.

On-line sales is not the only area where French businesses are making Internet strides. E-administrative services are evolving and increasingly used by a growing French on-line population. The third edition of the "ADELE barometer for administration services on-line," carried out by BVA for the ADAE agency in March 2005, showed that 25% of French people had already conducted administrative procedures via the Internet. A 93% satisfaction rate, stated in the same survey, is a sign of the efforts and ingenuity of French companies in using new technologies, and it should come as no surprise that France ranked third in the international "Performance of public services: new expectations, new experiences" survey in April 2005.

France's migration toward fiber-based broadband is a facilitator for innovations in Internet delivered media. France has the most-advanced IPTV market today and the most IPTV subscribers of any country. France was also first in Microsoft's IPTV rollout in 2006. In Europe, the French are leaders when it comes to watching TV on the Web with 59 percent saying they view previews and episodes of their favorite shows on-line.

Continuing to look at French Internet uses, it is easy to see they are more passionate about blogs than Americans are. In May of 2006 alone, 60% of French Internet users visited blogs, while the figure was about half that in the U.S. The idea of unlimited telephony via broadband seems to have caught on with technological innovations like Livebox, now the leading WiFi multiplay gateway in France, which passed the 2,000,000 user mark in April 2006. Since July 28, 2004, France, under the auspices of the *Association des Fournisseurs d'Accès*, has had a charter for "Music and Internet" to facilitate the economy of legal distribution of digitally formatted music on-line and the protection of its artistic creators.

A final note about network computing and the Minitel era. Minitel was popular not because the French fell in love with computing. Rather, it succeeded because there were no computing issues to deal with. Even now, only a little over 60% of French households actually own personal computers. The French ISP Neuf Cégétel remembers how France responded to the simplicity of Minitel. They have developed a limited function personal minicomputer, about the size of a toaster, using a Linux operating system with a simple graphic user interface which will be provided as part of their broadband service.

If they succeed, it will not only boost the French broadband subscription statistics, but it may also advance the status of open source computing and the possibility of commercially competitive Linux-based operating systems.

Other French-speaking areas of the world are embracing Internet culture. Canada's technological infrastructure is second only to the U.S. among the G7 countries, particularly strong in number of computers and number of Internet hosts per 1000 people. It was one of the first countries in the world to embrace high-speed Internet. ISOC Quebec has a prize-winning plan for achieving 95% Internet connectivity in Quebec by 2017. Because of Canada's bilingual status, French-language content is relatively high.

In Africa, French-speaking countries generally have a higher profile on the Web and greater institutional connectivity than the non-French speaking countries. In Cameroon UNITAR and ORSTOM have collaborated in a joint project focusing on technical capacity building in Sub-Saharan Francophone Africa. Of university Web sites in Sub-Saharan Africa, 20 come up in French as their primary language. If you add in some North African countries like Algeria, Morocco, and Tunisia, the number increases significantly. In some of the Francophone countries which had used Minitel, X.25 packet-switched based services (impractical in modern public Internet because of high-cost and traffic-based tariffs) are now used by banks and other large corporations requiring secure real-time low-volume data transactions such as credit card verification. In spite of very low wages, superstructure, and other difficulties, in Francophone African countries like Senegal, Morocco, and Benin, well over 5% of the population were Internet users in 2005.

In a virtual cosmos of the Internet, where all languages share the same space and where fewer than 30% of users are English speakers, other languages gain in importance. Naturally, the status of French on the Internet is going to be affected by the actual number of French speakers worldwide relative to the number of speakers in other languages. As we all know, arguments about the importance of a language based on raw demographic statistics have little validity, though even in this primitive statistic French is ranked sixth. It is when we consider the number of countries where French is an important Internet access language, the connectivity growth, type, and quality in French-speaking countries, the number of French-language Web hosts, the presence of French in page translation applications, the usage patterns of French speakers, and the rate of expansion into immersing Internet media

such as IPTV and wireless Internet from hand-held mobile devices, that we begin to understand the "net" worth of French.

Robert "Tennessee Bob" Peckham
University of Tennessee-Martin
[bobp@utm.edu]

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