

# Connectivity Scorecard 2011

## France



France  
6.06

	Score	Weight
<b>Consumer</b> Infrastructure	0.63 (0.95)*	0.13
<b>Consumer</b> Usage and Skills	0.50 (0.79)*	0.13
<b>Business</b> Infrastructure	0.67 (0.86)*	0.41
<b>Business</b> Usage and Skills	0.58 (0.83)*	0.21
<b>Public sector</b> Infrastructure	0.46 (0.79)*	0.07
<b>Public sector</b> Usage and Skills	0.57 (0.79)*	0.04

\*The score of the leading performer for this component

Table 1: Component Scores & Weights 2011

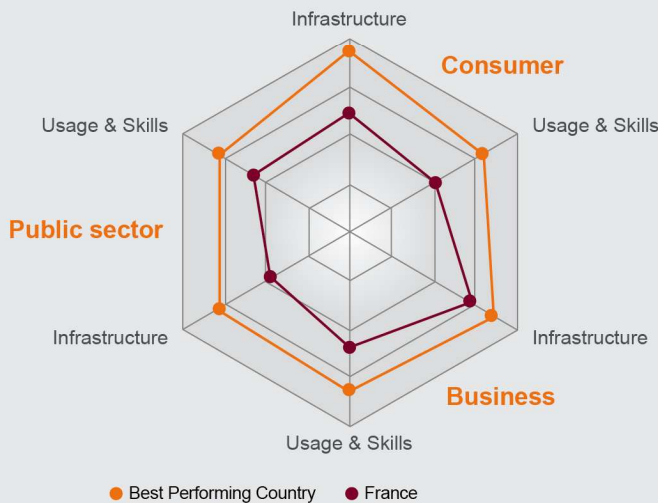


Fig 1: Component Scores 2011

### Overview

France scores 6.06 and climbs a solid three places to rank 15<sup>th</sup> among the Innovation-driven<sup>1</sup> economies on the Connectivity Scorecard 2011 index.

France is effectively tied with Ireland, which scores 6.08. New indicators and to a very modest extent, updated weights, helped improve the country's performance and ranking, but the fundamentals of France's performance can be characterised along similar lines as last year. In all, France is a moderately strong performer with room for improvement.

### Strengths

France scores highly in fixed penetration, fixed broadband coverage (although this indicator shows only modest variability as most innovation economies have near-universal coverage), and is also closing the gap with the leading countries in terms of the proportion of the population that uses the internet. On the business components, the country does well in terms of business uptake of broadband, although again this is a measure that shows limited variability in countries' performance. France also does well on enterprise telephony penetration and reasonably well on business uptake of mobile data services. On the business usage component, France performs well in terms of the employment base in science and technology which shows there is a strong presence of technically literate or highly skilled technical workers. French performance is moderately good on several other indicators. On the public sector (or "government") components of the Scorecard, France does well in terms of the usage of e-Government services by enterprises, and also quite good in terms of the measures from the UN e-Government Index.

<sup>1</sup> As defined by The World Economic Forum [www.weforum.org](http://www.weforum.org)

## Weaknesses

There are several areas where France can improve. On the consumer front, 3G penetration (the share of all subscribers who are 3G subscribers) is relatively low, especially when contrasted with Asia-Pacific countries but also compared with some others in Europe. Average broadband speeds (measured as the average file transfer rate from Akamai's servers to IP addresses) are relatively low. Mobile voice usage, as well as the usage of wireless internet away from home or work are other areas where France's consumers appear not to be making as intensive use of technology as their counterparts in many other countries. On the business front, the levels of spending on IT services and the level of investment in ICT are moderate, while the penetration rate of secure internet servers is surprisingly low. On the public sector components of the Scorecard, the French performance is weakest (in common with many other nations) on the spending on IT hardware, software and services by government, educational and healthcare establishments.

## Conclusions

France is a moderately strong performer on the Connectivity Scorecard. However, as pointed out above, there are many areas where its performance can be improved. As is the case with Germany, the services sector in France has lagged in productivity, but unlike the case with Germany, France does not quite have the manufacturing-driven export economy to compensate for this. Resistance to difficult economic reforms and relatively tough labour laws might also hamper business incentives to invest sufficiently in ICT. All these factors acquire some urgency, especially since France needs growth. The country has been slipping slowly down the per capita GDP rankings, and the problems of slow growth and high unemployment have been present for a long time. ICT is no silver bullet for France, but the government should continue monitoring and targeting the development of ICT, particularly in the business sector.

There are areas of France that now receive high-speed broadband at seemingly low costs, but the overall uptake of such high-speed broadband has been relatively slow. Regulatory-related disputes have also been a problem for France in matching its once-lofty ambitions for such high-speed rollouts. Of course, infrastructure is just one part of the picture, but at least in this area, policy efforts that provide regulatory clarity and proper incentives for investment should help.

Rank [']	Country	Connectivity Score
1 [1]	Sweden	7.84
2 [2]	United States	7.82
3 [4]	Denmark	7.47
4 [5]	Netherlands	7.45
5 [3]	Norway	7.09
6 [8]	United Kingdom	7.06
7 [7]	Australia	6.93
8 [9]	Canada	6.88
9 [6]	Finland	6.78
10 [11]	Singapore	6.40
11 [15]	Belgium	6.31
12 [n/a]	Austria	6.27
13 [17]	Germany	6.27
14 [12]	Ireland	6.08
15 [18]	France	6.06
16 [10]	Japan	5.89
17 [16]	New Zealand	5.84
18 [13]	Korea	5.80
19 [20]	Spain	5.09
20 [19]	Czech Republic	4.93
21 [21]	Portugal	4.80
22 [22]	Italy	4.79
23 [23]	Hungary	4.50
24 [24]	Poland	4.26
25 [25]	Greece	4.22

\*last year's rank in parenthesis

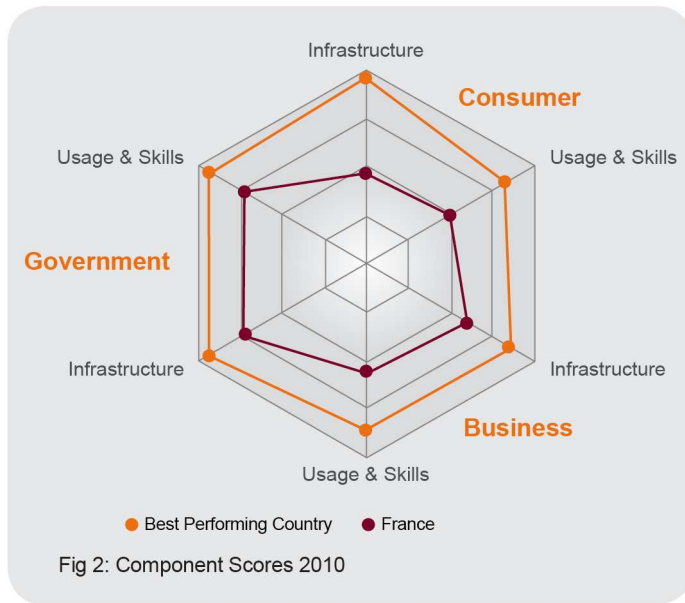
Table 2: Connectivity Scorecard 2011 Results – Innovation-driven Economies

## 2011 vs. 2010

France ranks 15<sup>th</sup> with a score of 6.06, up 0.41 points from its 5.65 score and 18<sup>th</sup> rank in 2010. Had we not updated the weights this year<sup>2</sup>, France would have scored 6.00, so the new weights had some very modest benefit to the overall French score, but not the ranking, which would have remained 15<sup>th</sup>. Rather, the improvement in France's scores owed more to changes in the indicators, particularly the consumer infrastructure indicators. As explained below, the addition of new indicators resulted in a general trend of increasing consumer infrastructure scores and decreasing scores on public sector components of the Scorecard.

The change in most countries' consumer infrastructure performance owes to the inclusion of three indicators which tend to equalize countries' performance. These three indicators are (a) fixed broadband coverage, (b) 3G coverage, and (c) unique

<sup>2</sup> For more information download the Connectivity Scorecard 2011 Report from [www.connectivityscorecard.org](http://www.connectivityscorecard.org)



user mobile penetration. On the first two indicators, most “innovation” nations have at least 80% to 85% of their population covered by wireless and fixed-line broadband networks. On the third metric, most nations have at least around 60% of their population that owns a mobile device, but the proportion seldom, if ever, exceeds 95%. Thus this indicator shows only limited variation. Had we used the more conventional, but less merited indicator of “SIM cards per 100 population” (which is how many agencies measure mobile penetration), there would have been some more variation on the “mobile penetration” metric as some countries have SIM card penetration rates of 150 per 100 population or more. In the French case, using fixed penetration and unique user mobile penetration as separate metrics was undoubtedly helpful in boosting the consumer infrastructure scores. Further, the inclusion of some new business indicators has helped France, such as data on the uptake of mobile data services by businesses. The French score on business infrastructure has risen from 0.60 to 0.67, an appreciable increase.

The decrease in many countries’ public sector scores is due to the inclusion of additional metrics on public sector or quasi-public-sector investments in IT hardware, software and IT services. These new metrics had the effect of creating additional dispersion in country scores, with some country scores on the “public” or “government” components falling substantially as a result of the inclusion of these metrics. France experienced this decline to a significant degree, but the low weight of the government components coupled with the substantial improvements in the consumer and business infrastructure categories meant that France was still able to improve overall. Also, greater weight placed on

the business infrastructure component also boosted France’s score.

The Connectivity Scorecard is based on comparative scores between countries, and, therefore, each country’s performance is measured in relation to the best performing nation in each component at a given point of time. As with other indices of relative rankings, it is therefore hard to interpret the Scorecard in terms of absolute “improvements” or “deteriorations” and to make comparisons of scores over time.

### About Connectivity Scorecard

The Connectivity Scorecard is a global ICT index which, unlike other available research, is the first of its kind to rank countries in terms of “useful connectivity”. That is, not only on the deployment of ICT infrastructure but also to measure the extent to which consumers, businesses and the public sector “make use” of connectivity technologies to enhance social and economic prosperity. This “useful connectivity” is defined as the bundle of infrastructure, complementary skills, software and informed usage that makes ICT the key driver of productivity and economic growth.

Commissioned by Nokia Siemens Networks, the study was created by Professor Leonard Waverman, Dean, Haskayne School of Business, University of Calgary, and Fellow, London Business School. The study was conducted by the consulting firms Berkeley Research Group and Communicea.

For more information on the Connectivity Scorecard, visit [www.connectivityscorecard.org](http://www.connectivityscorecard.org)

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