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Working paper **Internet – a new potential for European political communication?**

Case report: **France**

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I) Market of Internet providers.

1) Identity cards¹ of the main Internet providers in France.

The Internet market appears rather decentralized since one can find 9 different providers proposing subscriptions, 11 proposing 'free' access, 6 regional providers.

- **Wanadoo.** (Director Nicolas Dufourcq). Opened in 1996. Since the 23rd of June 2000, it gathers all the Internet-related activities of France-Telecom. 6642 peoples are working for the group.

Main shareholders: France telecom (public telephone company, 72,2%), Dixons (12,4%)

Services: free access, subscriptions, ADSL

Market Shares: 39%

Site: wanadoo.fr

- **AOL (America On Line France).** Opened in March 1996. This is the national branch of the world leader in Internet access provision (AOL Time Warner). In July 2001, there were 250 company employees in France (Director: Stephane Treppoz).

Main shareholders: CEGETEL, Canal+ (both part of Vivendi Universal) have exchanged their shares in AOL France for shares in AOL Europe (March 23rd 2001). They were 'historical' partners in AOL France (55%).

The shareholders are now AOL and the German group Bertelsmann (since 2000, they have formed a European joint-venture).

Services: subscription, unlimited access, ADSL.

Market Shares: 16%

Site: aol.fr

- **Club-Internet:** opened in October 1995.

Main shareholders: Initially, it was created by the Lagardère group (newspapers, publishers (Hachette), and military industries (Matra)). At the beginning of 2000, it was bought by the European leader in Internet access providing, the German group T-Online. It was the first provider to propose in France (October 1999) a subscription where access and communications were included.

Services: subscriptions, ADSL, free access.

Market Shares: 6,5%

Site: Club-Internet.fr

- **Diligo.fr.** Opened in April 1999.

Main shareholders: Channel Com Interactive. From a quick check on the site it appears that the company is now offering its customers to switch their membership to club-Internet...

Services: subscriptions, free access.

Market shares:

Site: diligo.fr

¹ Given the fast evolution of the sector it is rather difficult to know what one is talking about: a company that is one of the main actors in 2000 might have disappeared in 2001 or become part of a larger group.

The Tiscali group in France.

Tiscali is now one of the main actors in the Internet market in France: 3 200 000 members in Europe (growth of 28% between Sept. and Dec. 2000) and 750 000 in France. With its 4 different companies, Tiscali France represents 13,7% of the market in access provision and employs 651 persons (director: Rafi Kouyoumdjian)

Created in January 1998 by Renato Soru, it began to provide Internet access in Italy in April 1999.

It has bought three French companies concerned with the Internet sector: A Telecom SA (Dec. 1999), World online France (Dutch company) in Sept. 2000, and the Liberty surf company (Jan. 2001). It is now the second telecommunication and Internet access provider in Europe. In France, it owns: Infonie, Worldonline, Freesbee and Liberty Surf.

Market shares of the Tiscali Group: 9%

- Infonie. Created in 1995

Main shareholders: Initially: Interactive Partners, Production Marcel Dassault (military industry and press), Christophe Sapet, Public.

Infonie is now the property of the (Italian) Tiscali group.

Services: subscriptions and free access.

Market Shares:

Site: infonie.fr

- LibertySurf.

Main shareholders: Is now part of the Tiscali group. In March 2001, the main shareholders were Bernard Arnault (40%), KingFischer Group (40%).

Services: subscriptions, free access, ADSL.

Market shares:

Site: libertysurf.com

- Free. Opened in January 1999. It possess its own network of communication connected to the France Télécom one and can control the technical quality of the communications. It is also the cheapest provider as it offers a subscription for 50 hours at about 15 euros.

Main shareholders: Free (Proxad society), Iliad. (its website announces a 100% French telecommunication company)

Services: free access, subscription.

Market shares: 12%

Site: Free.fr

- Netclie.

Main shareholders:

Services: subscription, free access

Site: netclie.fr

- 9online/Mageos

Main shareholders: 9 telecom (private telephone company) owned by Telecom Italia (97,22%). Opened in June 1999.

Services: subscriptions

Market shares:

Site: 9online.fr

On the emerging market of the high-speed Internet 6 companies offer this service: 9online, Club-Internet, Mangoosta, Infonie, LibertySurf and Wanadoo (which is said to gather 90% of the customers in this sector).

The Internet access providing market appears rather open in France since:

- there are several companies offering access;
- most of these companies are owned by foreign groups.

Yet: the main actor remains a publicly owned one (Wanadoo/France Telecom), which is the leader in the sector. Its competitors accuse France Telecom of benefiting from its ambivalent position: it is both an access provider and the company who owns the telecommunication networks which means that any provider has to contract (pay) with France-Telecom to have access to the telephone network.

2) The structure of the market.

1) Type of access (Source Médiamétrie-ISL, March 2000 at <http://www.mediametrie.fr/web/index.html>).

Free access: 34,4%

Paying the exact time spent connected: 2,9%

Regular subscription/limited hours: 15,6%

Regular subscription/unlimited connection²: 60,8%

2) Main actors (Source IDC-May 2000 <http://www.idc.fr>).

The four main actors in the access sector are: France-Télécom, Groupe Cégétel, Club-Internet and Liberty Surf. They represent 55% of the market of those who have access to the Internet and 70% of the professional market. But France-Télécom is still far ahead as it reaches 43% of market shares.

The fast growing sector is the ‘free access’ one: these companies gathered 3,7 millions of users (with half of them being regular ones).

Number of users (Source: JDNET, November 2001: <http://www.journaldunet.com/chiffres-cles.shtml>)

| company | users |
|---|-----------|
| Wanadoo | 2 568 000 |
| Tiscali (Libertysurf, WorldOnLine, Infonie), Freesbee, | 1 150 000 |
| Free | 1 000 000 |
| AOL France | 900 000 |
| Mageos | 750 000 |
| Club-Internet | 700 000 |
| M6net | 600 000 |
| Oreka | 500 000 |
| Freesurf | 500 000 |

² This does not mean that users don't pay for extra hours. They subscribe for 10,20,30 hours and pay a fixed price for any extra hour.

Survey about the main Internet access service used³ (Source: JDNET, November 2001)

| Company | Percentage |
|---------------|------------|
| Wanadoo | 39% |
| AOL | 16% |
| Free | 12% |
| Tiscali | 9% |
| Club-Internet | 6,5% |
| Others | 17,5% |

As these figures clearly show, even if the actors are numerous, privately owned and, for most of them, owned by foreign groups, the dominant actor remains France Télécom with almost 40% of the total number of users.

The public phone company is accused by its competitors to benefit from its position of owner of the network. During the discussion over the price for unlimited connection time, the *Association française des fournisseurs d'accès* (French association of access providers), protested against the *Autorité de régulation des Télécommunications* (Telecommunications Regulation Authority) because the price decided -- which France Télécom asked for the use of its network-- appeared too high (45 euros). It was exactly the price for an ADSL connection (an area in which France-Telecom is the unchallenged leader with 90% of the market shares).

Moreover, France Télécom has tried to protect an activity, the Minitel, which competed with the Internet and was a huge source of profit for the public company.⁴ The success of the Minitel and its profit-making nature for France Télécom has probably slowed down the development of Internet in France.

³ They may have several subscriptions.

⁴ The Minitel was a french network of communication, parallel and competing with the kind of possibilities offered by the Internet. Through a small computer, users could have access to services from companies and would pay to France Télécom for the exact time they spent online (from few cents of euro to almost one euro per minute). Very slow and expensive it could not compete with the possibilities of Internet but it remains very widespread and used. For example, 40% of Degriфтour (an online discount travel company) activity was still made through Minitel in 2000.

II) Uses and profiles.

1) Number of people online.

Source: Médiamétrie-ISL (2000)

Internet access (millions) [trim = trimester]

| | | | | | | | |
|-----------|-----------|-----------|-----------|-----------|------------|-----------|-----------|
| 4 trim 97 | 1 trim 98 | 2 trim 98 | 3 trim 98 | 1 trim 99 | 2 trim. 99 | 3 trim 99 | 4 trim 99 |
| 2,8 | 3,1 | 3,3 | 3,4 | 4,0 | 4,3 | 4,7 | 5,9 |

Source: journaldunet.com

Number of people with Internet access at home:

December 2000 = 6,8 millions (survey Médiamétrie)

January 2001 = 7,6 millions (survey CSA-TMO, <http://www.csa-tmo.fr/fra>)

February 2001 = 7,4 millions (Médiamétrie)

March 2001 = 7,9 millions (Jupiter MMXI, <http://fr.jupitermmx.com/xp/fr/home.xml>)

June 2001 = 8,4 millions (Jupiter MMXI) [a netvalue survey (<http://www.netvalue.fr/>) announces 9,6 millions for June 2001]

Source: Baromètre IDC, 18 mai 2000.

From the last three months of 1999 to the first three months of 2000 there was a 27% growth in the number of people with Internet access (+112% between the first three months of 1999 and the first three months of 2000). This growth is linked to the expansion of the professional market (+30,4%, and represents 57,3% of the computers with Internet access)

2) The 'online French' profile.

Source: site AFA

source: (Médiamétrie-ISL) [1er trimestre 97-4ème trimestre 1999]

Household equipment:

Modem: 2,7% (1997) - 8,4% (1999)

CD-ROM: 7,2% - 16,3%

Computer: 16,8%- 22,2%

Differences depending on where people live:

Percentage of people having access to Internet in the considered region:

Ile de France (Paris and surrounding *départements*): 8,9 %

Champagne-Ardenne: 1,1%

4 475 000 French over 18 have been online in the past three months (at home, at the office, elsewhere).

Uses of the Internet:

43% sometimes
22% almost everyday or everyday
35% regulars (at least once a month).

Age:

2% are 65 years old or more (they represent 21% of the French population).

23% are 18-24 years old (12%)

32% are 25-34 years old (19%)

32% are 35-49 years old (28%)

11% are 50-64 years old (20%)

The youngest part of the population is over-represented since 55% of the Internet users are 33 years old or younger while they only represent 31% of the total population.

Social and economical background:

Higher social background = 56% of Internet users and only 22% of the French population.

Retired = 4% of Internet users while they make up 23% of the total population.

Urban vs rural:

Base 100: overrepresentation of people living in big towns (>200 000 inhabitants) = 107 ; Paris =189, rural zones = 69.

34,4% of Internet users are 'free access' providers customers.

Sex:

men: 66%

women: 34%

Among those who buy online, the proportion is even higher men= 89%, women=11%. They are older than the average Internet user (60% of them are between 35-49 years old while 29% of the 'online' population are in this age group) and more well-off (65% [vs. 56%] among those having the highest social background)

III) Political and news websites.

1) Main web sites, domains and portals visited

Top ten of domains in July 2001 (Source: Jupiter MMXI, France, panel: 8914 people at home)

| | Once visitors (millions) | Digital média ⁵ % |
|---------------------|--------------------------|------------------------------|
| Total Digital Media | 8,457 | 100 |
| Wanadoo.fr | 4,379 | 51,8 |
| Free.fr | 2,859 | 33,8 |
| Libertysurf.fr | 2,419 | 28,6 |
| Yahoo.fr | 2,400 | 28,4 |
| Microsoft.com | 2,305 | 27,2 |
| Multimania.com | 2,274 | 26,9 |
| Voila.fr | 2,060 | 24,4 |
| Msn.com | 1,966 | 23,2 |
| Yahoo.com | 1,882 | 22,3 |
| AOL Proprietary | 1,810 | 21,4 |

| Top 10 supra domains | Top 10 owners | Top 10 categories |
|-----------------------------|----------------------------|--------------------------|
| Wanadoo: 4,514 | Wanadoo sites: 5, 602 | Providers: 7,914 |
| Yahoo: 2,96 | MSN Microsoft Sites: 4,275 | Portals: 6,330 |
| Free | Lycos Sites: 3,824 | Services |
| MSN | AOL Time Warner | Leisure |
| Microsoft | Tiscali Sites | Corporate |
| Libertysurf | Yahoo Sites | Online sales |
| AOL | Free Sites | Finance |
| Multimania | Vivendi Universal Sites | Annuaire/Daily life |
| Lycos | T-online Sites | Travel-Tourism |
| Voila: 2,117 | Ulimit.com: 1,406 | Search engines: 2,319 |

⁵ It represents the number of Internet users in each country visiting (at home) at least one the websites, domain or online services during the 30 days surveyed.

Number of visitors of news media web sites in july 2001:

In regard of the French media and the Internet there are only data on the visitors of news media web sites available. The table below includes visitors of different media websites and not only those who visited online newspapers.

| FRANCE: Number of visitors of news media web sites in July 2001 | | |
|---|---|------------------|
| | Media | Visitors |
| TF1 | Television | 5 902 710 |
| Le Monde | Broadsheet | 5 175 691 |
| Canal numedia | Pay per view television | 2 800 464 |
| Libération | Broadsheet | 2 490 600 |
| France-Televisions | Public Broadcasting Television | 1 596 054 |
| Radiofrance | Public Broadcasting Radio | 1 182 262 |
| Le Figaro.com | Broadsheet | 1 082 191 |
| Groupe NouvelObs | Weekly news magazine | 900 004 |
| Leparisien.com | Parisian daily (with a national edition: <i>Aujourd'hui</i>) | 853 145 |
| Le monde diplomatique | Monthly newspaper (specialised in International news). | 447 997 |
| L'Express | Weekly news magazine. | 383 538 |
| Courrier international | Weekly news magazine (mainly translations from foreign newspapers). | 300 954 |

Source: Cybermétrie, Février 2002
Newspapers analysed in the Europub project in bold type

Main uses of Internet.

Médiangles / Conseil supérieur de l'audiovisuel, nov. 1999
Enquête en ligne, 4.300 répondants dont 2.400 à domicile.
Base : Tous utilisateurs (domicile + professionnels + étudiants)
Redressement effectué sur la base de l'enquête téléphonique

| ? Sites Web consultés au cours des derniers jours | 30 | 1996 | 1997 | 1998 | Juillet | Novembre |
|---|----|------|------|------|---------|----------|
| | % | % | % | % | 1999 | 1999 |
| Moteurs de recherche, annuaires | 91 | 86 | 83 | 87 | 87 | 70 |
| Actualité générale | 63 | 58 | 55 | 61 | 61 | 66 |
| Actualité informatique | NC | NC | NC | 29 | 29 | 41 |
| Constructeurs informatiques, logiciels | NC | NC | NC | 31 | 31 | 41 |
| Voyage | NC | NC | NC | 44 | 44 | 38 |
| Actualité de l'Internet | NC | NC | NC | 27 | 27 | 37 |
| Information sur le cinéma | NC | NC | NC | 36 | 36 | 34 |
| Météo | NC | NC | 33 | 34 | 34 | 33 |
| Jeux | 20 | 28 | 35 | 28 | 28 | 32 |
| Actualité sportive | NC | NC | 31 | 23 | 23 | 31 |

| | | | | | |
|---|----|----|----|----|----|
| Actualité économique et financière | 14 | 26 | 28 | 25 | 30 |
| Petites annonces d'emploi | NC | NC | 27 | 23 | 23 |
| Distributeurs de CD audio | NC | NC | NC | 20 | 22 |
| Banques | NC | NC | NC | 14 | 21 |
| Matériel hi-fi, photo | NC | NC | NC | 12 | 21 |
| Sites d'enchères | NC | NC | NC | NC | 20 |
| Autos-motos | NC | NC | NC | 12 | 20 |
| Distributeurs de livres | NC | NC | NC | 16 | 19 |
| Sites d'hébergement de pages personnelles | NC | NC | NC | 33 | 18 |
| Sites de l'Administration | 16 | 18 | 16 | 18 | 18 |
| Erotisme | 33 | 31 | 24 | 13 | 15 |
| Petites annonces immobilières | NC | NC | NC | 11 | 13 |
| Petites annonces automobiles | NC | NC | NC | 8 | 12 |
| Mode | NC | NC | NC | 10 | 12 |
| Cosmétiques | NC | NC | NC | 8 | 9 |
| Distributeurs de vin | NC | NC | NC | 5 | 7 |
| Comptes d'entreprises | NC | NC | NC | 4 | 6 |
| Autres produits alimentaires | NC | NC | NC | 6 | 6 |

2) Political parties and politicians:

Political Parties:

19 out of the 24 official French political parties have a web site. But under the label 'political parties' the search engines of Yahoo France finds 442 answers; Nomade, 326; Excite, 187 and Voilà, 157. Which gives an idea of the political activity of associations and small groups on the net (and of the reliability of the search engines...).

According to a study⁶, national political sites are updated very often (almost daily) which is not the case for local political sites. Press releases, discourses, interviews are released on the web sites within hours of their publication.

As far as interactivity is concerned, 5 out of the 6 (the Front National does not have any forum or mailing list) main political parties enable some form of debate: via forums (Parti socialiste, Parti communiste, Rassemblement pour la République, Union pour la Démocratie Française) or mailing lists (Les Verts). Three parties (all on the Left) offer more flexibility (PS, PC, Les Verts) in the discussion as they do not impose any themes while the web sites of the RPR and UDF (Right-wing of the spectrum) prefer to limit the discussion on topics the party is interested in. Moreover, 'answers' from the party to questions sent through forums appear to be very short or, most of the time, there is no answer at all. It is also impossible to become a member of a party online (some offer the possibility to print the document which has to be sent back with money) and there are no 'virtual' groups within the party.

From a technical point of view, the aforementioned study by Fabienne Greffet has compared the quality of different political parties web sites. Some appear very good from this point of view, especially the one of Démocratie Libérale with many videos to download (it might be linked with its conception of new technologies as a symbol of the liberal economy) while traditional parties (RPR and PS mainly) web sites are very poor in content and badly set up.

⁶ Most of the data reported in this section come from Greffet, Fabienne, « Les partis politiques sur le web », in Andolfatto, D., Greffet, F. Olivier, L. (eds.) *Les partis politiques: quelles perspectives ?* Paris, L'Harmattan (Logiques politiques series), 2001.

In terms of content, the web site of Démocratie Libérale appears once more the most impressive with a lot of articles, analysis from experts and links to other web sites. The web site from Les Verts also has a lot of content with archives dating back to 1996 (when the site was created) but most web sites appear rather poor with only chronologies of the party and internal literature. Most sites remain very national since only the National Front web site (!) proposes an 'English version'. Les Verts is the only party where 4 foreign languages are available: English, Spanish, German and Greek. Very few of them list links to foreign web sites (except for Démocratie Libérale).

MP's :⁷

100% of respondents said there are connected for professional reasons.

35% said they have access at home.

60% use e-mails.

39 MP's (among the 103 who answered) said they have a web site dedicated to their parliamentary activity.

40 % considered that online communication would play an important role during the 2002 general election (46% stated it will play a minor role).

⁷ source: survey netpolitique.net http://www.netpolitique.net/deputes_et_internet.htm

IV) Internet policies.

1) Online administration.

online administration

Since the launching of the PAGSI (*Plan gouvernemental d'action pour la société de l'information*: governmental program for information society) in January 1998, online administration is a top priority of the "state modernisation" policy. A report of the *Commissariat général au plan* acknowledges that the public sector has, within 2 years, almost reached the level of the private sector in Internet access.

Within 4 years, 3500 public sector web sites have opened (3578 in May 2001) and there are 4,5 times more visitors. More and more administrative documents are released online and there are now 900 administrative forms online (there were only 600 forms online 6 months ago).

In 2001, 5,6 billions of francs (almost 854 million euros) have been spent for the computerisation of the public sector.

e-government

E-government (from a survey by Taylor Nelson Sofres released on the 9th of November 2001) : France is ranked 11th on 27 countries surveyed in the use of e-government.

18% of French people (and 55% of internet users) have used online services of governmental websites. Which is under the world average (26%) while the use of internet is as widely developed in France (33% of the population) as in the rest of the world (31%). That's better than its immediate neighbours (Germany : 17% and UK : 11%).

14% of users of governmental websites are looking for information (vs. 20% for the rest of the world).

6% are downloading online documents (vs. 9%).

4% give personal information (7%)

2% have used services that imply to pay with credit cards (6%).

Main users are young people (18-24 y.o. = 43% ; 25-34 y.o. = 25%) and the most well-off part of the population.

Reasons for reluctance in use of governmental websites : 84% of the French consider it is risky or very risky to give any personal information on governmental websites (vs. 64% in the world). Most confident are the youngsters (21% of the people under 25), men (15% vs. 8% among women), the most well-off (17%) and those with the highest educational level (22%).

2) Governmental policies over Internet.

Schools:

98% of upper high schools (*lycées*) had Internet access in September 2000, 30% of primary schools (50% in August 2001) and 89% of the junior high schools (*collèges*). In August 2001, there was one computer for 6 pupils in lycées as opposed to 1 for 23 pupils in 1997, 1 for 14 in junior high schools (collèges) as opposed to only 1 for 26 pupils in 1997. Each curriculum now

has a 'new communication technologies' aspect. Editors are encouraged to produce online contents.

Research and Development:

In July 2000, the government decided to release a 1 billion fund for public research and to raise the number of researchers in new technologies of information and communication by 25%.

The research institute INRIA staff will rise from 755 people to 1180 and the budget has already risen by 61 millions of francs in 2001 (a bit less than 10 million euros). The CNRS department on information and communication will hire an additional 40 researchers.

Measures have been taken to help the funding (through 'business angels' for example) of new companies in the communication sector. In 2000, 1 out of 15 new companies were in the NTIC sector which contributes to 20% of the Gross National Product growth since 1996 and employs almost 3 million workers.

Wider access.

7000 public access Internet stations will be opened among which 2500 numeric public spaces (in libraries, city councils, etc.) where people will be trained in new technologies. The whole territory should soon have access to high-speed connection (6% of the population is already connected) although some reports say it may take years in fact.

Parliamentary bills:

On March 13th, 2000, a bill recognized the juridical value of 'online signature'.

On June 13th 2001, the Council of ministers examined a project for a government bill on "the information society." The bill seeks to promote confidence in networks by guaranteeing the freedom of public communication, clarifying the legal framework for online trade and increasing security in the information society. It also wants to widen Internet access and the territorial reach of networks of communication.

During the summer 2001, an interconnected file on criminal infractions has been legalised (it had been operational since 1995).

In the post-September 11th context, a bill on 'daily security' has been adopted that, according to many organisations (Ligue des droits de l'Homme, Syndicat de la magistrature, Syndicat National des Journalistes, Reporters sans frontières, ATTAC), threatens individual freedom especially in the communication sector. It deals mainly with the time during which connection data could be kept, and access to keys to decipher electronic data.

Security:

The decree of the 16th of May 2000 created the *Office central de lutte contre la criminalité liée aux technologies de l'information et de la communication* (Central Office to fight criminality linked to new technologies).

Creation of CERT/A (Computer emergency response team/administration), which detects attacks against State information systems.

3) The regulatory authorities.

Two main institutions are in charge of the regulation of the Internet in France: the CNIL (Commission Nationale de l'Informatique et des Libertés) and the ART (Autorité de régulation des télécommunications).

The first one, deals with 'ethical' problems raised by computer technologies and, later on, Internet (secrecy, private life) while the second one regulates the telecommunication sector which includes the Internet.

ART (www.art-telecom.fr) was created on January 5th, 1997. It is an independent administrative authority. This creation was directly linked with the opening, in application of European laws, of the telecommunication market to competition (bill of the 26th of July 1996, effective in January 1998). Its role is to allow for an optimal functioning of the telecommunications market. The ART is composed of 5 members: 3 of them nominated by the Président de la République and 2 by the presidents of each legislative chambers (Assemblée nationale and Sénat).

- Consulted over legislative bills and executive regulations concerning telecommunications, technical rules.
- Company requests for access to the telecommunications market are scrutinized by the ART, which transmits them to the executive body.
- Evaluates the cost and tariffs of the public service in telecommunications.
- Receives complaints from actors of concerned sectors.
- Must ensure an equality of treatment between all the actors.

CNIL (www.cnil.fr): created on the 6th of January 1978, the CNIL is an independent administrative authority. Composed of 17 members (2 MPs, 2 senators and representatives of several administrative or judicial bodies: Conseil d'Etat, Cour de Cassation, Conseil économique et social etc.). Traditionally its role was to control the creation and use of files (use of personal data, cross-files, etc.). With the rise of Internet it became responsible for the respect of privacy, use of personal files, etc. on the web.

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