



France 2013,
shocks & sanctuaries.

NOBODY'S UNPREDICTABLE*



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[Lead-in]

Ipsos Flair grew from a desire to combine the six areas of expertise Ipsos offers (Marketing, Advertising, Media, Opinion, Customer Relations, Data Collection, Processing and Distribution), in order to present a vision of society based on observation and interpretation of the behaviors, attitudes and opinions of consumer citizens.

Initially launched in France in 2005, Ipsos Flair spread to Italy in 2010, to China in 2012, then to India and South Africa in 2013.

Internationalizing the report hasn't changed our original approach: we view research results as symptoms whose analysis helps create a mapping of structuring and emerging trends.

In France, "no regrets" definitely characterized the 2012 electoral sequence: that's the title we gave to the seventh Ipsos Flair report, to define the mindset of a population that was determined to turn the page in many areas, devoid of passion or indignation.

The presidential and legislative elections confirmed our prognosis: Nicolas Sarkozy, Ségolène Royal and François Bayrou were beaten, the champions of 2007 missed the bus.

"No commitment" could have been the title for 2013; advertisers (and not just telecom operators) certainly presented that option, as though in response to consumers' mobile, versatile attitude, and their increasingly rapid decision-making.

"France 2013, shocks & sanctuaries" expresses the new stakes better.

As we know, the French are among the most pessimistic people in the world, the most negative about globalization, the most worried about the future; their savings rate is also higher than average, whatever the circumstances, just in case...

Since 2007, the notions of local, traceable, nostalgia, home-made have provided reassuring responses and strengthened the walls of the Gallic village, supported by borders and "made in France," embodied in brand strategies or political projects.

Meanwhile, debates on competitiveness, flexicurity, re-industrialization have developed out of the shake-ups created by:

- *The consequences of previous choices,*
- *The impact of deficits and debt on financial balances,*
- *Domestic demographic, cultural and sociological transformations,*
- *The industrial goals of large groups,*
- *The capacity to anticipate – or not – the real impact of global prospects, such as China being the number 1 economic power by 2016 or US energy independence by 2020.*

The mythification of France's "30 Glorious Years" and the museification of the boom¹ years can no longer suffice; yes, the sanctuaries are there to preserve them, but their imaginary motto ("I will maintain"²) presents a serious risk of setbacks and anachronisms.

Sometimes, public opinion sanctuarizes its own values and resists the shocks brought by change; sometimes it's the Authorities who sanctuarize notions that are no longer held by public opinion, and the misunderstanding begins.

Nowadays, the shocks are dislocating the sanctuaries³: the permanent work contract has been called into question, hourly production costs are perceived as a handicap, the laws of 1905 seem out of step with radical Islam, the social shock absorbers are raising questions about their collective cost, the strategic choices made by India or China are reversing the balance of power.

The consequence of these tectonic shifts: a country caught between the desire to change nothing, outlets, sudden transformations, individual determination to get by.

In other words, we could also have called Ipsos Flair France 2013 "Syncopated Society" (in music, syncopation and offbeat refer to a rhythmic element in conflict with the beat).

Firstly, with the beat of institutions that have lost control of everything: neither citizens nor consumers are behaving as expected, "economic patriotism," "loyalty and commitment," the same tough combat.

Secondly, the counter-rhythms from the special interests that are exploiting the various breakdowns:

- *Technological counter-rhythms with universal access and the mobility of online network systems,*
- *Cultural counter-rhythms, with the gap between consumer-citizens' criteria and the discourse coming from players in society (politicians, media, corporate world).*

A couple of examples.

With the President of the Republic calling on people to make an effort, IKEA's French advertising incites people to "Profit" (Njut)!; hardly surprising therefore that fewer and fewer French people accept the idea of making sacrifices.

With most advertisers reasoning in terms of purchasing power, the upper socio-professional groups have no taboos to declare: "it's not about being rich or poor, but about whether you're a sucker or not⁴." Nor are they the last to profit from alternative selling or distribution channels, to adopt habits out of step with their resources, to juggle between price comparison sites in order to buy as cheaply as possible.

Within this context, how far can the sanctuarization of values and habits go in terms of anachronism and dogmatism, "normal" or normative, disruption and creation?

¹ "La France heureuse (1945-1975, les Trente Glorieuses)," special edition by Historia and Paris Match

² Motto of William 1st of Orange-Nassau, Governor of the provinces of Holland, Zeeland and Utrecht)

³ Cover photo, the double glass bell that is supposed to preserve the standard kilogram measure in a vacuum (90% platinum and 10% iridium).

⁴ Quote from a participant at a Krisis© session six months before the "Pigeons" ("suckers") movement began. On September 28, 2012, in reaction to plans to double the tax rate on capital gains from the selling of a business in the 2013 budget, a handful of opponents spoke out on Facebook and founded "Les Pigeons, movement for the defense of French entrepreneurs." Within a few days, the virtual aviary had attracted 60,000 unhappy supporters, and by October 4, the government back-pedaled on its plans. Which makes one wonder what will happen the day the "Pigeons" inspire every single taxpayer...

The clue to the fact that the French – lacking a compass – are engaging in the art of fugue lies in the emergence of new current affairs commentators:

- *The social geographers who analyze France's situation according to whether the place of residence is the city center or suburbs,*
- *The psychoanalysts for whom the description of politicians is mythology (Prometheus or Epimetheus) or Hugolian poetry "the eye was in the tomb and was staring at Cain."*

Farewell politologists?

The debates of the future will play out between electoral sociology and architecture, in a relentless fight between the super-ego and the id.

In the meantime, Ipsos Flair France 2013 keeps forging ahead.

Happy reading!



Jean-Marc Lech

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User's guide

*“Since the ancients didn't have the compass,
they could scarcely navigate anywhere
but near the coastline”*

Montesquieu

2012, year of no regrets

Clapperboard

Nicolas Sarkozy, François Bayrou, Ségolène Royal. The French nation's electoral tally was impressive in 2012. With no regrets, they eliminated every one of the champions of 2007.

Following her failure in October in the Socialist Party primaries, Ségolène Royal ran in the 1st constituency of the Charente-Maritime department against socialist dissident Olivier Falorni. Her candidacy, imposed by the party leadership without consulting the base, was viewed as an intolerable case of electoral pitchforking.

Nor was she helped when French First Lady Valérie Trierweiler tweeted: *"All the best to Olivier Falorni who has lived up to expectations, fighting alongside the people of La Rochelle for so many years with selfless commitment."*

With no regrets, Ségolène Royal was eliminated by her rival who won with 62.97% of the vote.

Between the two rounds of the Presidential election, François Bayrou had stated that he would vote against *"the chase to the extreme right, the obsession with immigration and the obsession with borders,"* against *"the line chosen by Nicolas Sarkozy, a violent line, that contradicts with our values, my values, but also the values of Gaullism."*

Result 1: *"A blank vote would signify indecision, the other option is to vote for François Hollande. That's the choice I'm making."*

The MoDem party supporters who liked the man were thus happy to see him adopt a clear position; in the name of principles and values, the Centre was no longer a place of indecision, but a place of choices dictated by an interest superior to the Right / Left split.

A position shared by PS supporters regretting the fact that François Bayrou hadn't already joined Ségolène Royal in May 2007 and happy with a decision that clearly cut him off from *"Nicolas Sarkozy's right-wing drift."*

For the others, François Bayrou was betraying his historical camp through hatred or personal contempt for Nicolas Sarkozy, compromising himself with a hotchpotch combining the Socialist, Front de Gauche and Green parties, making the opportunistic choice of being an artisan in the defeat of the UMP candidate.

Result 2: François Bayrou was eliminated on Sunday, June 17, 2012 by the socialist Nathalie Chabanne. The evening of the second round of the legislative elections put a – provisional? – end to fifteen years spent in the second constituency of the Pyrénées-Atlantiques department.

As for Nicolas Sarkozy, he piled on the traveling and the sometimes contradictory declarations during his campaign. For example, his positioning as captain in the storm clashed with the impression that during the entire *"Greek crisis," "Euro crisis," "infernal domino of Ireland, Spain, Portugal, Italy..."* sequence, France was not in an equivalent economic depression for all sorts of reasons, any more than it was threatened by a nuclear accident identical to Fukushima.

The reasons for this? Structural mechanisms that had been in place for years, tax collection, State administration, no mafia, no mass corruption, the country in the black by 4 or 7% of GDP, loan access terms, etc., in the name of a responsibility rule and a principle of reason going beyond partisan splits that have solidified over time.

The comparison with Fukushima (which preceded the European crisis) follows a similar route, with no authority seeming irresponsible enough to build a nuclear power station in France by the sea, beneath the safety level and in a seismic zone.

A problem-absorbing dome, an umbrella held by the goddess Precaution, that's the first image of the French model, the main reason to give it sanctuary.

Within this context, without a storm, who's the captain? Especially when the captain changes stance, asks for help, thus discrediting his proclaimed role as Protector and the hardening of his positions on security and immigration.

Most of his proposals for 2012 also clashed with the exceptionally good recall of the promises made in 2007 (the President of purchasing power, liquidating the heritage of 1968, power-washing insecurity, earning more, merit bonus etc.), media coverage of formulas such as the famous "get lost, idiot⁵," to his way of "Seeming Presidential" which led to "damaging the function."

Nicolas Sarkozy doubtless underestimated the split between his agenda and the agenda of public opinion, which began in September 2007 with the public transportation strikes, the specter of a country paralyzed, the 170% increase in his salary, the divorce from Cécilia, meeting Carla Bruni, etc.

The overlapping of two sentences, during a press conference in January 2008 at the Elysée Palace, revealed the fracture: "the coffers are empty," "between Carla and me, it's serious." On the one hand, the expectations and disappointments of the French people, on the other, the personal life of the President. Two ecosystems existing in parallel.

Culture shocks

"I won't hide, I won't lie, I won't apologize." That was Nicolas Sarkozy's response to criticisms of his vacation at a home belonging to American billionaires or the evening he spent on May 6, 2007, at the exclusive Parisian restaurant Le Fouquet's, the fact of going away for weekends, talking about his ministers as collaborators, going jogging with a Rolex, etc.

This approach de-sanctuarized the image of the President of the Republic, with a supermodel and singer as First Lady for the first time and a lifestyle described as "bling bling."

His style probably wouldn't have been a problem if the results had met expectations, if the purchasing power of French citizens had visibly increased, if confidence has been restored.

⁵ To a visitor who refused to shake his hand during the Foire de Paris trade show

It's possible that the notions of success, complex-free money, pleasure consumption, guilt eradication set in gradually.

It's clear that this was a cultural shift closer to the American model than to the traditional French reserve when it comes to symbols of success, the desecration of the petit-bourgeois model denounced by Balzac, and whose moralism governs the country's relationship with money and regulates ostentation.

But with the results crisis leading to the disqualification of incompetent authorities who had failed to respond to the problems, with the financial crisis requiring plans to *"save Europe and save the euro,"* Nicolas Sarkozy signed the end of this other *"split"* and prompted in reaction the apology of *"normality"* embodied by François Hollande.

"I'm a normal candidate who likes people more than money," "I will be a normal President." Those calm values and positioning, standing in opposition to the *"agitation"* and *"hyper-presidency"* of Nicolas Sarkozy, won the day.

As a result, after the crystallization of 2007, 2012 proved to be an election devoid of passion, a marriage of reason.

Despite a few brief spasms restoring a desire to believe in Sarkozy and displaying his authoritative stance and *"re-presidentialization"* (e.g. his firm attitude when the Russian army invaded Georgia in 2008 or during the European summits of 2010 and 2011), on May 6, 2012, François Hollande became President of the Republic with 51.64% of the vote, and 48.36% for Nicolas Sarkozy, in other words a gap of only 3.28%.

Fear of the unknown, his experience as President of the Republic, the possible deepening of a European crisis that had come dangerously close since late April 2012, the fact that it was impossible, going beyond Nicolas Sarkozy as an individual, not to vote for him without wanting your camp to lose if you weren't on the Left, these were the reasons motivating voters who opted for Sarkozy at the ballot box.

An outsider with a maximum 45 or 46% of the vote, he ultimately reduced the gap between himself and François Hollande, despite the election being positioned as an anti-Sarkozy referendum, with Sarkozy compared by some of his opponents to Hitler, Madoff, Laval and Pétain.

What now?

The values and attitudes of the French appear to be structured by a few lasting and recurrent keystone elements: defiance, anti-globalization, pessimism, savings, paradoxes, a vindicated form of narcissism, nostalgia, a society devoid of enthusiasm, of avant-gardism...

- **Defiance:** only 19% claim to trust the people they meet, i.e. the lowest score in the world.

- **Pessimism:** in July 2012, their view of prospects for a change in their living standard was even darker than the previous month, with a 13-point drop in the corresponding indicator, the biggest drop since November 2009. It regained 5 points four months later.

Compare this to the 63% who consider themselves to be *“as well, or even better protected than before the crisis”* (as opposed to 53% of Europeans overall)⁶.

- **The very negative view of globalization**; associated with relocation since March 2001, the date when *Renault’s* Vilvoorde plant and the *Lu* biscuit factory in Nantes closed, it created the impression that the big symbols of the 30 Glorious Years were either victims of the new economic situation, or were profiting from it.

In July 2012, the announcement that 8,000 posts were to be eliminated by PSA management, and the decision by Stif⁷ to relocate to a call center in Morocco only added to the gloomy scenario, a major political risk at a time when the Ministry of Productive Recovery had been assigned the opposite task of re-industrializing France.

At the end of the year, the conflict between Lakshmi Mittal and the government regarding the closing of the Florange plant in Moselle did nothing to help the French reconcile with globalization. Worse, Mittal embodied the reversal of the power balance between developed countries and “emerging” countries, a major shock for the last industrial sanctuaries...

- **One of the highest levels of savings in the world**, not forgetting the 1,200 tons of gold available and convertible into cash, ingots, necklaces and jewelry on the slightest increase in the price of an ounce (+ 125% since 2007).

As though an “under the mattress” culture existed, or as though they feared a rapid reduction in social shock absorbers and community systems, the French are investing in the most traditional ways, such as the “Livret A” post office savings account.

In June 2012, its net intake (deposits minus pensions) progressed to a level of 11.17 billion euros, a figure higher than the previous year (10.07 billion euros).

Already in 2011, it had taken in 20.6 billion euros (comprising 5.5 billion euros in capitalized interests) after 10.1 billion in 2010, 19.1 billion in 2009, and 23.6 billion euros in 2008⁸. In September 2012, the total amount deposited into Livret A and LDD accounts reached 304.2 billion euros, and in October, after their ceiling was raised, they reached 21.29 billion euros more.

Within this context, one can imagine the impact of a drop in interest rate for the Livret A linked to inflation, while the tax scale applicable to 2012 income was not revalued to bring it in line with inflation, which was the basis for a new index for calculating the minimum wage. Same cause, three effects...

- **A taste for paradox**: on the one hand, the media invoke the economic crisis⁹ to explain that one out of two people are not taking a summer vacation. On the other, 765 km of accumulated traffic jams in the back-and-forth of the first week-end of August, 850,000 train passengers (c.f. 1.2 million on July 31), 800,000 passengers at Orly and Roissy airports (c.f. 900,000 the previous weekend).

In an aging country, with between 500,000 and 700,000 people entering retirement every year, with more than three million second homes, now we perhaps need to wonder as to the exact meaning of “going on vacation”...

⁶ *Observatoire Européen Crédit Agricole Assurances / Ipsos-Logica Business Europeans’ attitudes to risks, July 2012.*

⁷ *The organization in charge of public transportation in the Paris region*

⁸ *The subprime crisis incited the French to invest in the Livret A to profit from an interest rate between 3 and 4%. In early July 2012, total assets for the Livret A were equivalent to 228.1 billion euros.*

⁹ *Cf. the recurrence of “despite the crisis” as an introduction to most topics presented on the TV news...*

From 1992 to 2012, the number of people aged 60 and over increased by 22.6%, which makes their proportion equivalent to the proportion of under-20s (respectively 23.5% and 24.5%).

For the French statistics institute, INSEE, *“if the demographic trends observed until now continue, by January 1st, 2060, metropolitan France will count almost 74 million inhabitants. By 2060, 23.6 million people will be aged 60 or over, i.e. an 80% increase in around fifty years. The increase is biggest for older people (the number of over-75s would go to almost 12 million and the number of over-85s to over 5 million). The number of under-20s would increase slightly, but their proportion of the metropolitan population would drop to 22%. From 2014, the proportion of people under 20 would be less than that of over-60s”*.¹⁰

- **A boom in narcissism:** the more harrowing the context becomes, and the more people tend to withdraw into themselves.

The same phenomena (economic insecurity, H1N1 virus, explosion of an Icelandic volcano, unemployment, etc.) haven't had the same influences: in France, the harrowing events of the 2008/2009 period, the reassuring impression that France was doing better than the other European countries in 2010/2011, the widespread fear of seeing the 2012/13 recession govern shifts in the “French morale” seismograph.

They encouraged individuals to retract into themselves, locked inside a sense of vulnerability and a need for recognition.

“Care” has been brands' response and has established itself as the strategy to show the consumer that he was at the center of their concerns and the center of the world.

- **Ego-marketing:** *“C'est bien parce que c'est vous”* (“It's just because it's you”), *“Carrément vous,”* (“Completely you”), *“Venez comme vous êtes”* (“Come as you are”), *“En faire plus pour vous,”* (“Do more for yourself”), *“Mon banquier, c'est moi”* (“I'm my own banker”), *“I love moi,”* etc... all taglines and mantras adapted to French egoism, which can express itself even better thanks to the Internet encouraging all forms of narcissistic expression.

But by cultivating the client's ego, brands have failed to nurture his benevolence, or loyalty, or liking; they have increased the level of expectation and criticism in a consumer for whom **“everything is normal,”** who is accustomed to service and expects more and more in order to **“profit.”**

The life cycle of ego-marketing, like the marketing of “living in the moment,” is tending to shorten, imposing a need for permanent adjustment to ensure that the reality of the product, service or stores lives up to expectations, becoming ever better.

The change in the tone of Amaguiz¹¹ advertising is revealing: taking over from a good-natured and slightly nutty Jean Rochefort character, another French actor, Thierry Lhermitte, embodies a nastier and colder personality who throws a less competitive consultant into the water (“The drifter”) or abandons his girlfriend because they need to act “as though” they were at Amaguiz (“The tandem”).

¹⁰ http://insee.fr/fr/mobile/etudes/document.asp?reg_id=0&ref_id=T12F032

¹¹ Amaguiz is the Groupama brand dedicated exclusively to Internet distribution

- **Nostalgia:** retro-marketing, retro-design, vindication of the human aspect, of the local and of authenticity, these are also a response to a fear of the future and globalization, but these codes are wearing out or becoming standard, everything is “old-style,” “traditional,” “of the past,” etc., with an authenticity that can be verified on the web.

- **A complex-free mistrust of the rules:** the notion of profiting contains and implies, at a given moment, transgression, a limitless, merciless spirit of rebellion, absence of a common project. The examples abound, since rules and ego are incompatible; among the most striking, the live-broadcasting of the destruction by French handball players (gold medal in the London Olympics) of the set of L'ÉquipeTV on August 13, 2012, “festive behavior” that was already at work four years earlier on Canal+.

More ordinary but more widespread, incivility (public intoxication, cigarette butts on the beach, loud noise, verbal aggressiveness) are accelerating the process of desocialization in some people and frustration in others, raising the issue of relations with fellow humans and the idea of a society “without other people.”

Line of sight

Most philosophies show that the more the ego fears destabilization, the more it develops an aversion to risk; transferred to a societal level, this vision creates a link between narcissistic quest and fleeing the discomfort created by questioning one's own lifestyle.

Which leads us to the questions that Ipsos Flair invites you to examine and which will determine your choices in terms of communications, positioning and values:

- **Waltzes**, which explains the risks of a normal tempo.
- **Sanctuaries**, which explores the French museum.
- **Shocks**, which describes the internal and external cracks threatening the fine balance of the sanctuaries.
- **Consequences**, which reviews the scenarios to be built for marketing strategies, whether corporate or advertising.

INTERVIEW

Brice Teinturier, Ipsos France

From Aulnay to Alcatel

*The thesis is simple: a **radical split** took place in French society in 2012, opening up a whole new cycle. That split took us from simple pessimism – an old and problematic phenomenon but which doesn't prevent us from living – to a sharp awareness of the brutal and definitive collapse of the system we've been living in. In the one case, we continue to project into the future, albeit in worried mode. In the other, the future doesn't exist and thus the prospect of our own disappearance lies ahead.*

This sequence opens with the tumultuous euro crisis of late 2011 and the continuous drift of countries like Greece and Spain. For the first time, the French could see poverty strike whole sections of the population not far from home. Poverty, and not some drop in status to come. For another few months, they would however consider and hope that the specter of destitution would not affect them directly, helped in that respect by the perception – and reality – of a welfare system that was playing its role. To the point of shattering under a dual shock: Aulnay and Alcatel.

Aulnay brought brutal confirmation of what they had been sensing: the old world is collapsing. It is emollient and a victim of the emerging countries' vitality. In primitive imagery, being devoured is an archaic and significant fear: if you aren't armed to retaliate, you won't survive and others will devour you. Paralyzed by the barrage of layoffs in the summer of 2012, the country trembled. As people had already suspected but it was now brutally confirmed, the working classes are not armed to confront global competition. Nor is our industry.

Alcatel Lucent: 5,000 jobs eliminated worldwide, 1,430 in France and this time it included engineers. Employees were stunned. No one was safe, including if you had a degree and worked for an international French group in the telecom and advanced technology sector. This time, the world had really shifted.

In late 2012, the historic milestone of 3 million jobless was surpassed and confirmed the swing. Once again, political alternation rhymed with powerlessness. François Hollande lost 20 points in 5 months. Unprecedented. Florange delivered the knockout blow by embodying all the negative facets of globalization: a power struggle that worked to the advantage of a distant and emerging country, India, and a boss viewed as totally amoral but who ultimately imposed his will on a sovereign State, ours. An industry that was in the process of dying. Jobs were protected but it wasn't enough, far from it.

So a reshuffling of perceptions was at work within a framework of growing concern. It was supported by 2 pillars. On the one hand, the gradual jamming of the three or four usual strategies for tempering fear of a decline caused by globalization, get over it or keep it at a distance. On the other, a new wave of xenophobic tension rooted in identity issues.

*That was the territorial response. Confronted with the fear of globalization, the rediscovery and exaltation of everything "local" provided an initial response. That hasn't disappeared but it's an increasingly fragile response, since now even the local is cracking and collapsing into pieces. Laurent Davezies' book, *La Crise qui Vient*¹², is very enlightening in this respect and confirms the presidential election results: in the big cities, people are getting*

¹² Laurent Davezies, "La Crise qui vient," Seuil, La République des Idées

by; in certain peri-urban and rural areas, public spending alone is enabling people to survive, although that's less and less the case. Moreover, reforming decentralization without taking these territorial disparities into account is incongruous.

A temporal response was and still is another defense mechanism. When you're worried about the future, taking refuge in nostalgia or "living from day to day without asking questions" is one possible stance. That is, respectively, what 48% and 43% of French people do. But on taking a closer look, it's the prerogative of the most vulnerable: white-collar workers, manual workers, Front National supporters and individuals without a higher education degree are the most likely to play tricks with time when the future is mainly synonymous with increased distress. And this is all about an increasingly submissive and closed relationship with time and the world.

Narcissistic withdrawal into oneself is a third option and probably one of the trendiest: after celebrating with extreme reverence what is technically the most archaic form of the human community, the family, the time has come for self-celebration of the individual by himself and of whatever makes him distinctive. Working on your own presentation, standing out at any price, being your very own brand, putting yourself on display, including the most trivial and least interesting things you can do or say, is both a trend and a symptom: narcissism is the negation of the other and occurs when exteriority and confrontation with others, which are potentially contentious but promote self-creation, portray your possible disappearance.

Finally, denial is an effective attitude of protection as long as it's temporary. Crisis? What crisis? For 39% of French people, the crisis doesn't exist, it's just a pretext for taxing more people. But denying the crisis becomes a little more difficult every day.

What looms behind all these questions and defense strategies in our relations with others and with the world is the recurrent issue of identity. Rarely have the French had such a strong feeling that their identity, in other words their very being, was threatened with disappearance. The immediate and current corollary to this existential anxiety is therefore an increasing tension over national identity. Narcissus, who looks only at himself and prioritizes past over future, rejects others. 36% of French people admit to having said racist, anti-Semitic, Islamophobic or homophobic things – and naturally the reality lies somewhere beyond what people are willing to admit to. This proportion affects 1 out of 2 UMP supporters (48%) and 70% of FN supporters, as opposed to 23% of those voting on the left. Upholders of a "complex-free" right wanting to "put all the cards on the table" so as to better tackle xenophobia and reject "all taboos" are in fact merely amplifying that xenophobia. Once the toothpaste is out of the tube, it's hard to get it back in again...

Against a background of weakened identity and an anxiety-ridden fear of disappearance, we are seeing the construction of head-on opposition between two totally simplified worlds: on the one hand, a conquering and arrogant form of Islam, powerful and unified, as though immigrants and Muslim French citizens formed a homogeneous and united community. On the other, a weakened France, victim of anti-white racism and of its own permissiveness and excessive generosity. On the one hand, youth, vitality and, it can never be said enough, amorality and parasitism, since these people are allegedly profiting shamelessly from the welfare system; on the other, French people who are increasingly languid, less and less at home, more and more threatened with dissolution. A dual dialectic is thus being established: in relation to the outside world, a dialectic of frontiers and withdrawal; in relation to the interior, a dialectic of expulsion, with the fight against Islam functionally enabling self-celebration as a unified group.

So we're in the wrong debate and the wrong diagnosis when we focus on the question of a possible and moreover very disputable "swing to the right" among the electorate. Indeed, the major evolution in French

society is occurring in the increasingly obvious prominence of another split, the split between opening and closing, with a definite tendency towards the latter: criticism of Europe and globalization, impression that France should protect itself rather than open up to the world, a dominant anxiety at “no longer feeling at home,” tension over national identity and an increasingly strong rejection of Islam. It comes with another, age-old split that is booming and which is also entering into competition with the right-left split, the opposition between the “people” and the “elites,” with the latter viewed as either incompetent and thus useless, or more cynical than incompetent, in other words deliberately moving within closed channels to better protect themselves and preserve their privileges to the detriment of the people.

The working classes are driving the urge to close and protect on the one hand, and contest the elites on the other. But this dynamic trend isn't limited to just office and manual workers: it's feeding off the rising level of precariousness and expanding to all those who view themselves as the losers in globalization, in other words a large part of the middle class. So we're not dealing with the phenomenon of a right-wing swing within French society so much as an expanded form of populism against a background of existential anxiety.

Within this context and for 2013, we're likely to see a continued increase in tension over national identity, politically symbolized by an expansion of the Front National and/or the trend within the UMP towards a “strong” right.

On the other hand, within French society there also exist certain counterpoints to this identity crisis, which, while it represents the majority in terms of trend or evolution, nevertheless doesn't concern the entire population in the same way. Five opposite symptoms can notably be observed and constitute levers for action:

- The aspiration to pleasure and happiness, which remains strong. It may be defiant and worried, but French society isn't deathly ill, or depressive. There is no “self-hatred,” one thesis that occasionally crops up, but on the contrary an aspiration to endure, to consume, to exchange and to live better. 92% of French citizens are happy to live in France, and 50% are very happy.
- Confidence in the progress made to improve society also remains strong (60%), despite all the crises encountered.* As the French see it, there is still a deep-rooted belief in the possible improvement of society.
- 89% feel concerned by the future of France, and 33% “extremely.” The notion that indifference reigns is fiction: French people are willing to get involved in many ways to move things forward, whether it's in their company or in non-profits, in their family life or in their professional life.
- The phenomenal success of a film like “Les Intouchables” brings a nuance to the idea of a society increasingly anchored in ethnic segregation, locked into an obsessively critical focus on the “nanny state.” Being open to others, the meeting of diametrically opposed universes, solidarity and humor are still idealized stances.
- Despite the crisis, despite Aulnay and Alcatel, despite the collective anxiety caused by unemployment, the feeling of personal vulnerability is still contained: only 13% of employees in the private sector consider that they have a very high probability of experiencing a period of unemployment in the next two years, 27% if we add those who opted for a fairly high probability. Yes, among blue collars, and notably those working in industry, the proportion is higher. But even so, 73% of employees in the private sector, and even more on the level of society as a whole, consider themselves sheltered in the midst of the crisis.

* see [Therefore, 2], Dominique Lévy p.127

So while tension over national identity and withdrawal have some fine days ahead, they still don't represent a majority trend. 2012 is a turning point, but French society is still just as solid as it is fragile, as defiant as it is active.

So as Ipsos Flair sees it, for 2013, the odds are good on the following 5 points:

- *The Front National and upholders of a strong right will expand, but that expansion will be contained.*
- *Political rhetoric will be marked by greater simplification and more verbal violence.*
- *There will be no social mobilization or movements of any great scope. Contestation will be expressed more through withdrawal or polling than in the street.*
- *The split between "top" and "bottom" will increase, on the other hand. The media, politicians, large corporations will be increasingly criticized and rejected. In contrast, we will observe a revival of small businesses and increased cooperation in different forms.*
- *Consumption will remain steady. It will explode in the information technology world but also, and above all, in the leisure sector.*

Waltzes

Waltzes

Scratching the ceiling

From the German word Walzer, going round in circles, the waltz is the opposite of the minuet, the best known of court dances, for its audacity: the dancer and her partner form a couple, whereas in the minuet or gavotte, they dance in a group next to each other.

The period from 2007 / 2012 saw the setting up of a system of explanations and actions based on a tempo as rigorous and improbable as making a complete turn in the 6 beats of the “Viennese” waltz.

- The discovery of a crisis within a system, “Lehmann Brothers, **toxic** at any price.”
- The reason for the crisis: a **malfunction**.
- The discovery of guilty parties who will have to **answer for themselves**.
- The need to **re-organize the foundations** of the system (prisons, economy, liberal medicine, etc.).

As their usage spread, these terms lost their effectiveness and became caricatured, with **malfunction** becoming the most comical of all, given the gap between usage and reality (everyday problems with the Paris transportation system, incident in a nuclear power station, consequences of a mudslide...).

2012/2013 is inaugurating a system of a new kind, one that is less technical and more moralizing:

- Criticism of an **unbearable** situation.
- The reasons for it: an **injustice**.
- The solution to it: a **normal** situation.
- Its extension with the duty to **set an example**.

Result: **capping**¹³, the acceptable “limit,” reason over madness.

Typical of example-setting, a principle that decides on what is normal or shocking, the salaries of the senior management of the largest public corporations and the 50 companies directly or indirectly owned by the State and their ten main subsidiaries were capped at a gross sum of 450,000 euros a year after the election of François Hollande.

Canguilhem in *“The Normal and the Pathological,”* Merleau-Ponty with *“Phenomenology of perception”* or Foucault, have all extensively demonstrated the risk of comparing normality as a reference, with what is not normal as pathological or deviant.

“Normal” also has the effect and intention of evening out and producing an acceptable vision of things, in the name of an ideology, class and the imitation of models, something that had already been noted by Bourdieu, Boltanski, Castel and Chamboredon in *“A Popular Art, essay on the social uses of Photography”*¹⁴.

¹³ Commissions, tax breaks, family benefits, fuel costs, ministry spending, or even winnings from the Euromillions lottery...

¹⁴ Paris, Editions de Minuit, 1965

Even things out

Let's apply this to everyday life.

Is it more normal to take a train or a plane for the French President's trips to Brussels or Toulon? An odd question that Général de Gaulle asked of Jacques Chirac, it was also asked in reaction to Nicolas Sarkozy's desire to equip the Presidency with an Airbus A330-200 at a cost of 176 million euros.

There are fewer questions in the USA about the legitimacy of including two Boeing 747-200B in the presidential fleet or in Germany about Angela Merkel's Airbus A340-600 (650 million euros were spent on the renewal of the German presidential fleet).

Prestige, security¹⁵, practicality (60 guests can be accommodated for long-haul flights with no stopovers), are all reasons not to question its obviousness for the French head of state, especially when the Airbus can fly him back to Paris or another city in the case of a major threat, which is always possible... and which relativizes the whole idea of saving money or CO2.

Opposing the economic nature of the train and the expensive, superfluous symbol of the plane might have seemed strange in 2012; this approach is well in line with using normality to even things out, but with a real risk of anachronisms in terms of values and uses.

As concerns the plane, 55% of French people had already taken one in 2012, 64% for a vacation or personal reason, 36% on business trips; low cost and price wars between competing airlines incited millions of people to travel, within the international context of 2.7 billion air passengers in 2011¹⁶.

For the train, access to first class has been simplified (a trip in 2nd class can even cost more), the TGV high-speed train has lost much of its mystique for the new generations, there is no gap in the level of services and comfort between classes so great that a rail trip could produce the imaginary effect of the first Paris-Constantinople in the Orient-Express on June 5th, 1883.

Above all, for a long time now, the destination has fascinated people much more than the means of transport: Rio, Kuala Lumpur, Saigon, Terra des Fuego, Hong Kong, Bora Bora, Fuji San, the Maldives... have a whole other ring to them than Boeing or Airbus... except on board the QEII or France II (which will be sailing from 2015).

In one case, standardization limits the desire to set an example because one cannot see what is special about wanting to be normal; in the other, normal clashes with wants, desires, dreams, in a word, the aspirations behind names like Caravelle or Concorde in French civil aviation.

"Being normal," is that the purpose of the French model? When normal becomes normative, dull, boring? These were questions asked by the Director of the Ecole Nationale d'Administration, complaining about the uniformity of his students...

¹⁵ The plane notably comprises offices, bedroom and bathroom, meeting room, civilian and military telecom center, operating theater.

¹⁶ Data from the International Civil Aviation Organization in 2011, i.e. a 5.1% increase compared to 2010. French airports welcomed 163.6 million passengers that same year. In 2011, Easy Jet transported 12 million travellers.

Consequences: increasingly scathing and cruel criticism¹⁷ of normalcy¹⁸, as Ségolène Royal would have said... and a trap.

In response to François Hollande commenting on his stay at the Brégançon Fort in July, *“a normal vacation, but not an ordinary one,”* the national secretary of the UMP stated for example: *“when you’re an apparently normal president, you probably take the train to get to your vacation site confronting a wall of cameras on the station platform. But when you’re a truly normal president, you also pay for your private vacation like every French person who earns his living. Since the estate belongs to the State and François Hollande is going there with his family for private and not professional or official reasons, there is absolutely no reason for the taxpayer to cover the bill.”*

In the long term, “normal” and “capping” present risks:

- **Discouraging** people if success hits a financial, fiscal, moral etc. cap, the very opposite of the upward social mobility of the 1950s and 60s and the prospects it offered.
- **Weighing down** the atmosphere with massification, with a view to being discreet, reasonable, reserved, uniform, with an obvious boredom too.
- **Spreading** this attitude to all consumer sectors, whereas the purpose of marketing and advertising is to create something imaginary, a dream element, to describe a unique relationship contrasting with the base reality of the product. No brand can envision being normal or average, which boils down to reducing the promise, therefore diminishing desire: practicality cannot be the only added-value...

In the end, are “normal” and “capping” the best answer to the prospect of a recession? Who is the egg and who is the chicken, negative media coverage of current affairs, public opinion complacent in its defeatism, a routine that pushes people to scare themselves, an aversion to risk?

Already in mid-August, 54% of French people claimed to be unhappy with François Hollande’s actions as President of the Republic, as opposed to 46% who considered themselves to be satisfied; during the same period five years earlier, Nicolas Sarkozy’s action was judged favorably by 71% of French people...

For 51%, things *“are tending to change for the worse in France,”* for 17% *“they are tending to change for the better,”* and, even more striking, for 32%, *“they aren’t changing at all.”*

Within this context, appeals to make sacrifices, to economic patriotism, to give up things in order to reduce the public deficit, could only encounter the limp, diminished and unyielding echo of a public opinion that is detached, seeking other types of discourse...

¹⁷ http://www.marianne.net/L-ete-pourri-de-Valerie-Trierweiler_a221501.html

¹⁸ *“Our normal president should understand that there is nothing normal in the world of which he is now one of the key leaders. He should take risks, give up his middle-class, Cold-War-version Atlanticist stances.”* (Opinion piece in *Le Figaro* by François Fillon, August 13, 2012).

INTERVIEW

Rémy Oudghiri, *Trend Observer*

2013: a certain desire for optimism

Four years already...

Four years in which the word “crisis” has insinuated its way into newspapers, television, radio, the heart of physical or virtual conversations, day after day... Our surveys and observatories have reported it back to us clearly: the mindset of the French as we measure it keeps getting darker. In metropolitan France, pessimism has established itself as the apparently undeposable sovereign. Since 2009, France, European champion of pessimism, has seemed stuck in the middle of a tunnel to which it can see no end. How can morale be maintained in a context like that?

The psychiatrist Boris Cyrulnik developed the concept of “resilience” to describe how one gets over a traumatic experience. His principle? The chance for resurrection – the famous energy of despair – can be found in the depths of great misfortune, when everything seems compromised. That’s where we are today. An increasing number of individuals want to escape the permanent pessimism. That doesn’t mean they think the situation will get better. On the contrary. But their “resilience” is based on a desire for optimism that is nothing other than a refusal to give themselves over to gloom and doom. Moreover, as we can see, as far as advertisers as concerned, these days salvation lies partly in a revaluing of the offer. It can be seen in every consumer category, from chocolate to cars via Bordeaux wine: premium is “in.” And the symbol can be underlined, because it is one: in the middle of the crisis, the German leader in hard discounting, Lidl, introduces “real” brands to check the drop in frequentation of its stores in France. That’s because hard discount, as the French see it, doesn’t seem to represent the ultimate solution to the crisis. Nor its impassable horizon. Consumers want something other than affordable but drab products. They want to keep dreaming and enjoying the good things in life.

So France wants to rebuild itself despite the mountain of pitfalls ahead. Behind that mindset lie a whole set of values that are taking shape and asserting themselves as the most dynamic of the new decade so far. They also sketch out a face for 2013, since everything suggests that they will continue to take on scope in the months to come.

An imperfect society that accepts itself as such

The best-seller by French positive thinking guru Christophe André put it very well in 2006: we must live “imperfect, free and happy.” And that’s the main message of positive psychology in France, the one that explains its growing success: “Be yourselves,” it tells us, “stop chasing pipe dreams and inaccessible models. Cultivate your imperfections, because they are a part of life.” And as a result, in our surveys, people are stating less and less that they’re concerned about the effect they’re having on others. They’re aware of not being perfect and that the cult of perfection creates nothing but frustration, failure and never-ending palinodes.

This way of thinking is already having very visible consequences. In the food domain for example, diets are off the menu more and more. It can be seen in the 2012 wave of the Observatory of French lifestyles and consumption modes (the “4,500”): an increasing number of people are coming to terms with their extra kilos. Consumers no longer want to be made to feel guilty.

Individuals taking refuge in the present

Another development is increasingly evident in our surveys: the present is becoming the dominant temporal horizon for a growing proportion of individuals. We're getting used to thinking short-term. That's not a new trend, but it's one that is triumphing these days. Rather than nostalgia, "presentism" is what draws our attention. The French know that their situation has become uncertain, precarious. So they must make the most of it in the here and now. What's the point in wagering on a future that moves a little further away every day? Consequence: ecology is less of a driving force, and long-term concerns are cast aside. The magic word today is always "pleasure." An immediate pleasure, sought after even more for the fact that it offers an escape from problems of all sorts, a way to forget economic misfortune, a fuga mundi.

Cooperation

Transactions between individuals have the wind in their sails, and dedicated website Le Bon Coin presents their capital. The economic crisis has generated huge interest in any formula enabling goods to be acquired at a lower cost. And the social media culture has done the rest: individuals are quick to sell their goods on the Internet. And they are increasingly buying from peers. A parallel system has been set up and is catching on like wildfire. It's the first touchstone in a society in which cooperation between individuals is taking place without a middle-man and on trust. Eventually, the individual will be increasingly encouraged to cooperate with people like himself. He will have everything to gain from it. And above all, he will have developed a taste for it.

Simultaneously, mutual aid between people is progressing and creating a safety net that is significant given the current exhausted condition of the Welfare State. Initially limited to the family sphere, mutual aid is also emerging in a society where donations of goods to the needy (old clothes, food...) are on the rise. These trends will very probably strengthen and oblige the institutional players, both public and private, to change their own strategies and positionings.

Hybridization as driving force

Within this context, people are increasingly open to experimentation. In fact that's one of the most promising areas for the future. Innovation will take place more and more through linking different universes together, mixing codes, reversing traditional hierarchies. Restaurants such as the Hippopotamus chain are experimenting with fast-food corners, while fast foods ape restaurants by moving upscale (the trend towards healthy, high-quality snacks, easier access to cuisine from VIP chefs...). The cameras that work best at the moment (aside from smartphones) are the hybrids. The Louvre expanded outside its Parisian confines by opening the Louvre-Lens, helping to reinvent the museum experience in the process, making it more varied, more diversified: the visitor strolls naturally through overlapping eras.

Hybridization is asserting itself as a fundamental movement, a response to the crisis of meaning. It's the symbol of a society that wants to move forward, even if that involves disrupting the most established reference points. Resilience means that too, a capacity to perceive opportunity in the unlikeliest terrain... France 2013: forward for uncertainty!

Cap or weigh down

Imagine a country where the words most commonly heard in the media are “conquest,” “success,” “progress,” “development,” “rebirth,” “confidence,” “success,” “international recognition,” “surpassing,” etc.

Another one, with “action,” “determination,” “opportunities,” “renewal,” “courage,” “resolve,” “pleasure,” “excess,” “difference,” etc.

The first one, China, is using them in the name of a triple project, international economic and cultural hegemony, the qualitative rise of “made in China,” materialism without the slightest complex, as shown by the Ipsos Flair China 2012, “The resolute spirit of the Loong.”

The second, Japan, because Fukushima generated a phenomenon of re-mobilization of its society, accelerating the abandonment of nuclear production¹⁹, asserting the desire to intervene more in the public debate in general and, in the longer term, restoring the principle of harmony between development / environment that is the foundation of Japanese culture.

The government’s intentions are not to be outdone: take back diplomatic leadership in relation to China and the two Koreas, economic leadership by capitalizing on the rise in value of the yen to develop the internationalization of Japanese corporations, technological leadership in the competition for innovation²⁰, notably in robotics with Israel.

Japan is an example of the tension between temptation to give up, obsession with safety, fatalistic individualism and a desire for dynamism²¹, a determination to influence the future, a creative spirit.

Third country, France, where the recurrent words are “efforts,” “crises,” “austerity,” “taxes,” “defiance,” “declassification,” “caps,” “loss of influence,” “withdrawal,” “freeze,” not forgetting “recession,” “bankruptcies,” “anemia,” “boredom”...

Analysts have compared the attitude displayed by inhabitants of countries with a high level of natural risk (Italy, Greece...), countries that have experienced famines and disasters (China, Asia..), their beliefs²² and their capacity to absorb shocks, to get up again, to move on, whether or not the world ends on December 21, 2012.

They explain the obsession with safety by the geographic location, or the inhibition of the spirit of adventure by the fear of risks on leaving one’s own country, as in Japan.

They associate suffering and the fact of living in the present because everything might shift from one second to another, a totalitarian regime, higher crime levels, etc.

¹⁹ The government is implementing a new energy policy to do away with nuclear by 2030 within a context in which 70% of Japanese people no longer believe its assurances when it comes to safety and 55% are opposed to the reactors starting up again; consequence of their desire to have weight in the balance of power, the government came up against a refusal by the first municipality concerned in June 2012, an exceptional phenomenon until then.

²⁰ Linked to the abandonment of nuclear, this project uses geothermal energy, the construction of bigger solar power stations, such as the one operating in Kyushu since July 2012, destined to produce 70MW with 290,000 photovoltaic panels for 22,000 households.

²¹ In relation to the morale of the Japanese, see Ipsos Global@Advisory: *The Economic Pulse of the World*, produced before the announcement of a growth in the Japanese economy going from 1.3% to 0.3% between the first and second quarter.

²² Unlike the West, which thinks in a linear manner with an ending coming last, the east has inherited from the Hindu cosmology with cycles of evolution-involution and rebirths.

France, on the other hand, is a country where nothing comparable has happened: no great climate or seismic threat, no triple typhoon in one week forcing whole populations to be displaced²³, no forest fires destroying 133,000 hectares as in Spain, no volcanic eruption for 5000 years in mainland France, no government disappearing in a plane accident as in Poland (April 2010, Smolensk), etc.

The speed with which the authorities are often overwhelmed when problems arise (tornado in Alsace, mudslide, flooding, etc.) is equivalent to the speed with which qualifiers are employed to:

- Either relativize as “mini” or “seen before” phenomena that had nevertheless been absent from local archives for tens or even hundreds of years.
- Or on the contrary, exaggerate them, with alerts that are later contradicted by the actual weather, predictions of weekends engulfed by snow being one example.

Zero risk

That’s the consequence of this very special relationship the French have with *risk*, as one of the most “*riskophobic*” populations of Europe: 79% think of the word “*danger*” when risks are mentioned (as opposed to 70% overall), and 43% of “*fear*” (as opposed to 33% overall); 62% consider that risk is more of a danger to be avoided, as opposed to 51% overall. Finally, while 70% of Europeans claim to “*take risks in their life,*” the figure is only 58% in France.

Elsewhere, in Greece for example, and despite a crisis whose real effects have been much harder than in France, risk-taking is highly valued, with risk viewed as an artifact in successfully extricating oneself.

77% of Greeks think that risk is “*more of a stimulant*” (cf. only 49% of Europeans), 68% of Greeks think of the word “*chance*” (cf. 37%) and 51% of “*ambition*” (cf. 30%) when risks are mentioned.

Note also that France is the only country in the world to have written the precautionary principle into its Constitution (article 5): “*When the occurrence of any damage, albeit unpredictable in the current state of scientific knowledge, may seriously and irreversibly harm the environment, public authorities shall, with due respect for the principle of precaution and the areas within their jurisdiction, ensure the implementation of procedures for risk assessment and the adoption of temporary measures commensurate with the risk involved in order to deal with the occurrence of such damage.*”

Had it been applied earlier, this principle of defiance considered as a universal premise would have slapped a death warrant on the steam engine²⁴, electricity, aviation, most vaccines, or even the wheel: indeed, what could be more dangerous than a circular mechanical part revolving around an axis that passes through its center?

Likewise, it would have led to an immediate ban on the Concours Lépine, created in 1901 by the Prefect of Police for the Seine department, to give Parisian toy and hardware manufacturers a chance to use invention to get themselves out of the crisis that was hitting them.

²³ On August 6, 2012, 2.14 million people were displaced and rehoused by the municipality of Shanghai and the eastern provinces, 7 million in the province of Zhejiang.

²⁴ A veritable bomb on wheels, a steam locomotive required constant surveillance of the fire to prevent the formation of clinker or the accumulation of ashes, along with the water level. If the water level is low, the safety fuses in the firebox melt, causing steam to extinguish the fire, but not always fast enough to prevent the boiler from exploding (<http://www.locomotives.free.fr>).

Among the riskiest innovations was the first Birum vacuum cleaner in 1907, the two-stroke engine, the washing machine, then the dishwasher, ballpoint pen, steam iron, portable typewriter, lawnmower, vegetable mill, the artificial heart...

The precautionary principle is putting a stop to shale gas exploration and drilling at a time when France is importing 99% of its oil, 98% of its gas, where the energy bill accounts for 90% of the commercial deficit, where in seven years the price of electricity has increased by 18%, the price of fuel by 29%, of gas by 49%.

After Poland, France is the Western European country said to have the biggest reserves (5,100 billion cubic meters, as opposed to 25,000 in the USA), which could bring energy self-sufficiency, as in the USA where the price of gas has been cut in half.

For information, the Mining Code was created by the imperial law of April 21, 1810, updated by decree on August 16, 1956, with a few amendments (1970, 1977, 1994). François Hollande made reforming it one of his campaign promises.

As part of the *“Energy transition programming law”* that the President of the Republic wants, a diversification of resources is on the agenda, with a progressive pricing system for electricity, re-launching the wind and solar energy industries, the housing renovation plan (one million a year), etc.

As concerns shale gas deposits, the verdict theoretically eliminates them from the program: *“the economic arguments exist, but in our current state of knowledge, no one can assert that mining through hydraulic fracturing is exempt from serious risks. I’ve asked Delphine Batho, Minister of Ecology, Sustainable Development and Energy, to immediately announce a denial of seven requests for permits registered with the state and which have legitimately generated concerns in several regions”²⁵.*

To what extent can this risk aversion radically influence the behavior of French people and will it require increasingly personal responses, among citizens, consumers, employees?

Breaks

Micro and personal

On the one hand, the precautionary principle accentuates the impression that everything is potentially dangerous. On the other, notions rooted in discomfort are being transformed into risk; we can see it in the development of insurance products and also in the health professions.

The health professions must be in step with that attitude: proximity, advice, individualized treatment, micro-specializations are the response, and this notably explains the end of epidemiological studies in breast cancer research.

²⁵ François Hollande, *Conference on the environment, September 14, 2012.*

Technologies are now at the service of defiance rather than confidence:

- Defiance with regard to the Authorities, questioning and checking whatever they happen to assert, visiting the corridors of power, ironizing over the slightest snafu.
- Confidence in brands, which are showing their customers that they are ever more concerned about being attentive and looking forward; faster than the politicians, they are putting together the resources (platforms, Smartphone access, etc.) to restore the link with consumers, through a sense of proximity.

With regard to citizens, the challenge proves to be more complex, although it's the basis of the method adopted by the Union des Démocrates et des Indépendants, the political party of the center-right founded by Jean-Louis Borloo on September 18, 2012.

Forget

Information searching, comparative sites, consultants, the opinions of other customers all help us have total control. Being ripped off, paying too much, being dissatisfied, as well as disappointed, have taken on the scope of a narcissistic wound.

Living in an overprotected setting, with minimal risk of destabilization, that's the best method for shifting from [bling-bling to puff-puff](#).

Rest and discovery, if possible by the ocean, are the recipe for an ideal vacation for French people, their probable must-haves (for those without children) being silence, meditation, withdrawal, to the point of staying in a Buddhist monastery practicing Zen Sôtô (Kanshoji, Dordogne).

For the others, Ibiza airport inaugurated the world's first exhibition featuring a dance floor, "*F*** Me I'm Famous*," with reference to David and Cathy Guetta. Three hotels in Saint-Tropez, *Le Byblos*, *La Messardière* and *La Réserve* were awarded the appellation Palace, like the Grand Hôtel in Cap Ferrat.

According to the Managing Director of La Réserve, "*clients come from across the world looking for calm, to be able to cut themselves off from everything just a few minutes away from the most famous festive locations in the world.*"

INTERVIEW

Estelle Guérin, Ipsos Marketing

The driver of drivers

At a time when the western world seems to be breaking down, looking at the human driving forces and what drives them can prove to be a saving grace: Who are they? What do they run on? What are their powers? Can they change the world?

Who are they? Inventive or entrepreneurial fiber?

“Driving force: masc. noun.

- *An organ that transforms an energy of a different nature into mechanical energy.*
- *A person who governs, controls, who is the source of something, who controls the activity of something: he’s the real driving force behind the company.*
- *Cause of action, decisive motive: the driving force of expansion.”*

Larousse dictionary

Let’s define human driving forces as individuals who create new energy or amplify the scope of existing energies. The ones who move the world and thus other people, on a small or large scale.

On the one hand, people who pull others along in their wake (not necessarily on purpose) through an approach based on theorization, invention or individual creation: inventors, researchers, artists...

Copernicus, Leonardo da Vinci, Einstein, Marie Curie, Mozart, Braque, Louis Armstrong, Carolyn Carlson, Warhol, Freud, Shakespeare, Pedro Almodovar... are a few famous members of this group.

Only an individual approach whose spread is accelerated by its rapid adoption by a section of the community or by the debate it sparks is able to generate a motor effect that pulls the entire community along.

On the other, those who immediately mobilize others by sharing a vision and a capacity to lead them towards a common goal or collective creation: company heads, spiritual leaders, politicians, military staff, non-profits, sportsmen...

Like Gandhi, Martin Luther King, De Gaulle, Gisèle Halimi, Aung San Suu Kyi, Bernard Arnault, Aimé Jacquet... But also Marie, a professor of plastic arts who conceived of and created with her class a fresco embellishing everyday leisure activities, or the female workers of Lejaby who saved their business thanks to their non-profit “Les Atelières.”

Certain driving forces, who are both creators and entrepreneurs, have encountered fame along with rapid and lasting success, a few examples being Bill Gates, Steve Jobs, Walt Disney, or Coco Chanel...

Brilliant, charismatic or simply determined, driving forces cannot operate without the support of others.

What do they run on? The pleasure of moving the world? For themselves? For everyone?

In all cases, they share the idea that you can change the world, or your world, by understanding and explaining it better, by adopting solutions to the problems, by showing things in a different light, sharing emotions, uniting energies or creating new usages or new attitudes.

And pleasure in all that? Far from being absent, it's a key ingredient since driving forces love being part of this change, venturing out onto new paths or taking their own destiny or the destiny of the world in hand.

These two constants hide two other, more intimate, mechanisms, which underlie a more individual or more collective action depending on how much weight they have within the same individual:

- Personal motivations

- *Recognition (need to exist as an individuality).*
- *Ambition (need for success or desire for power).*
- *Emotion (need to express their emotions).*
- *Love/Hate (inclination towards or aversion to a person, an idealized entity, a category of things, a source of pleasure or satisfaction).*
- *Comprehension (need for exploration and comprehension).*
- *Creation (desire to be the founder of something that didn't exist yet).*

- Collective motivations

- *Progress (need to transform for the better).*
- *Handing down (taste for handing down and teaching others).*
- *Rescuing (need to help others or combat injustice).*

What are their powers? The dark side or the light?

The powers of driving forces are undeniable and are increasing with the acceleration of communications and the expansion of access to all forms of data, notably via the digital media.

According to the "Star Wars" epic, the Force has a dark side and a light side.

The light side is said to be based on the ideal of good. Benevolence, assistance and preservation are its key values. Strong emotions such as fear and hate are outlawed.

The dark side for its part is said to be based on domination, the power of ambition, fear and hatred. It serves personal interest and is unfortunately addictive.

Love is said to be banished from both sides of the Force, since it has the power to shift people from one side to the other.

In real life, light and darkness are often mixed.

On the other hand, the positive driving forces in the long term probably all comprise a collective ingredient of progress, handing down or rescuing, even for a minority.

Can they change the world?

There are many examples of driving force personalities who have moved the world forward, are doing so now, or have moved it backward.

After the bling years of frenzied individualism, the core factor in a context of cultural, spiritual, political or economic uncertainty, the driving forces, and notably the collective ones, will play an increasingly key role in orienting society.

We can bet that the driving forces of the future will mix collective values with individual ones, like Bill Gates, CEO of Microsoft, now one of the biggest donors to anti-poverty and research causes worldwide.

In a world of ultra-consumption, brands can also lay claim to this driving force posture, provided that their promise is pertinent and plays out in terms of their actions.

“Life changes with Orange,” “Coca Cola – Open happiness,” “IBM - solutions for a small planet”: all promises of a better, new life, that will only work in the long term with the driving force of collective motivations demonstrated to consumers.

5 positive wagers for 2013 and more...

- 1. The number of driving-force individuals will develop in the face of the lack of solutions provided by the institutions: young company creators, active pensioners, companies taken over by employees... individuals are taking their fate in hand.*
- 2. All together for the re-invention of the world: the return of the collective action will accelerate, and with it, the return of the big drivers of positive change, whether economic, cultural or social.*
- 3. The creation of a link by the driving forces of the digital generation will accelerate and be placed at the service of real improvements in everyday life (social life, carpooling, bartering, house-sharing, job-seeking...).*
- 4. The inventors are back with the need for alternative solutions: new technologies, new therapies, new energies, new methods... a new era of inventions is opening up.*
- 5. The big brands will develop their potential as social driving forces, making a commitment in relation to greater emotional or functional consumer benefits.*

Sanctuaries

Shoring up

From model to sanctuary

France, land of exceptions

In 2007, Ipsos Flair described how the French public was convinced of living in a country that is different, special, that is not subject to the general laws of trade and can lay claim to absolute distinctiveness, on all occasions.

The discussions at the GATT Uruguay Round (1993-1994) had already created the foundations for this originality by allowing France to defend its “cultural exception” against the liberalization of all types of products, services or trade.

The No vote in the 2005 referendum or the negative perception of globalization, viewed as a threat, are other forms of defense and illustrations of this French exception notion.

The “French model” is a clever recipe combining:

- The idea of equality and justice,
- The deification of the Republic,
- Secularity,
- The notions of State or Welfare Corporation,
- Anti-capitalism and the rejection of liberalism,
- “The social ladder,” in other words the middle class as the key providing access to goods and consumption,
- The idea that the French republican model protects from communitarianism, that integration and “living together” are the antidote to multi-culturalist divisions,
- The conviction that the social shock absorbers are eternal, the gains perpetual, the systems²⁶ intangible,
- The certainty that the “30 glorious years” were the historic moment when the recipe was developed and diffused²⁷.

While other countries are taking a whole new look at a number of topics, such as education, repression, energy choices, city planning etc., in France, it’s as though the perfection of the model ultimately made calling it into question pointless, since all that is required is a “restructuring” of the model, and not the creation of something new.

At one point, comparison or experimentation brought the temptation to draw inspiration from other models: for example studying how Sweden, Germany or Denmark manage unemployment, the environment, security, the pension system...

The European economic crisis put a stop to the process; few countries stood comparison with France, as highlighted for example by the Managing Director of BNP Paribas, for whom *“if the euro zone hasn’t gone into recession yet, it’s because, although the level of public debt is high, private agents have a low debt level because they have a high capacity for saving. In the UK on the other hand, this balancing out doesn’t happen and the*

²⁶ Health system, Pension system, School system, Welfare system, Monitoring system for drug effectiveness and safety, etc.

²⁷ “La France heureuse (1945-1975, les Trente Glorieuses),” special edition published by Historia and Paris Match.

country is going into recession for the second time in three years, whereas it's undergone fewer shocks than the euro zone²⁸”

It's hard to prove the contrary when, in the first six months of 2012, the net financial assets held by households represented 759 billion euros, i.e. 43,864 euros per inhabitant in France, as opposed to 43,176 euros in Italy and 39,786 euros in Germany.

NB, the two countries in the euro zone where the level of public debt exceeds inhabitants' net savings are... Greece and Ireland.

Borders

The notion of borders has reappeared with regard to monitoring the flow of immigrants, legal labor, security and organized crime, etc., in the name of more or less isolated electoral arguments.

In its way, “nationalization” is a process for manufacturing a protective limit, a border around a given industrial center. We saw with the Mittal steel plant how hard it is for this to pass the trial of fire.

The economic crisis has created broad cracks in the principles of redistribution, inter-regional solidarity, shaking of the fiscal tectonic plates altering the political and electoral geography.

The common point shared by regions wanting to provoke a split in order to obtain their political, economic and above all fiscal autonomy, is being the wealthiest ones: Flanders in Belgium, Catalonia in Spain, Bavaria in Germany.

In France, twenty years after the referendum on the creation of the single currency, 64% of French people would have voted “no” if it had been held in 2012 (in 1992, it was ratified with 51% of the vote).

In Italy, the separatist movement Padania aims to create an autonomous region corresponding to the continental and septentrional part of Italy, notably to ensure that the *“taxes of workers in the North don't serve the welfare recipients in the South.”*

In Spain in early October, the autonomous community of Catalonia wanted to conduct a referendum on its independence, which was halted by Parliament. But the regional elections of November 25 gave a majority to the separatists, whatever their camp. On the Right, the Convergencia i Unio won 50 of the 135 seats making up the Assembly (but lost twelve) and on the Left, ERC gained 21 representatives (+10 compared to 2010). The goal: succeed, like the Spanish Basque country, in raising their own income tax if the Yes vote wins in the referendum.

Meanwhile in Belgium, the Flemish New Alliance, which wants to split from Belgium, was making great progress in the municipal elections, with Bart De Wever, leader of the party, becoming the new Antwerp Burgomaster.

In the UK, the British Prime Minister and the head of the independent Scottish government, the nationalist Alex Salmond, signed an agreement on the organization of a 2014 referendum on self-determination in Scotland.

²⁸ <http://www.challenges.fr/economie/20120802.CHA9417/zone-euro-les-menages-epargnent-toujours-leurs-actifs-financiers-equivalent-a.html>.

The discourse and ideology of the balancing out of taxes, the duty of solidarity, economic patriotism, or even the threats of a historic dislocation of countries, etc., nothing can stand up to the tsunami combining rejection of fiscal pressure, immigration, Euro-skepticism, and proclamations of identity.

What if the Alsatians no longer want to pay for the Bretons, or the Ch'tis cover for people in Provence? We can expect some more cracks to appear.

INTERVIEW

Marie-Odile Duflo, Ipsos ASI

Made in “chez nous”!

Yes, a French minister posing in an Armor Lux French sailor shirt with a Herbelin watch on his wrist and carrying a Moulinex food processor on the front page of a newspaper, now that was something new! Beyond the buzz it caused, the photos perfectly illustrate the importance of the economic crisis that the western countries are going through. For a minister to dare to get his shirt – sorry, his sailor shirt – wet, this crisis, far from being an epiphenomenon, must be deep and serious.

As history repeatedly shows us, the major crises always generate withdrawal into self, and the one we’re going through now is no exception to the rule. The economic stakes are being repositioned for new battles. Cultural, geographic, political and linguistic identities are being reaffirmed. Individualisms are gaining ground. And this redistribution of values, codes and information is even impacting the world of communications and advertising.

How can the crisis alter advertising discourse?

As long as we can analyze and decode it (and that’s our job, in a sense!), advertising is one of the most pertinent “markers” of the economic development of a country, but also of a brand or a product. It follows that development very closely, sometimes even anticipating it. Today, the crisis is here, well established. Advertisers are fine-tuning their commercial strategies, brands are changing the way they communicate, some people’s arguments are becoming identity-based or even nationalist, the consumer is changing. And at the end of the chain, advertising is echoing this radical change.

Is there an economic sector where this change is particularly visible?

No doubt about it, the car. And that’s no coincidence. The automobile sector is in fact one of the most sensitive and symbolic on the economic market. It’s the one with the biggest advertising investments. In France, Renault is the leading French advertiser, followed closely by Peugeot (4th) which is ahead of Citroën (6th)²⁹. Paradoxically, the German brands were the first to make the turn. For a long time German cars have had a reputation based on quality, know-how and high-end. And while the other brands, French or Italian for example, can easily lay claim to their skills in relation to the first two criteria, for the third on the other hand, their credibility remains to be proved. Whether we like it or not, the German car is synonymous with quality. And it’s in the name of that quality that three German brands now sign their respective advertising... in German!

Does this vindication of origins just concern German manufacturers?

No. Other brands are also being tempted to make the claim. But they do so in a lighter or subtler manner. Take the example of a simple “Chevrolet” pronounced in French with the American accent. Other brands such as Toyota or the Korean Hyundai are reversing the issue by trying to play the French card. It’s true that the Japanese manufacturer is producing its own Yaris model in France and so it can shuffle the cards by adding a legitimate “Made in France” and presenting to foreign tourists who the manufacturer addresses in their own language,

²⁹ Stratégies “100 leading French advertisers in 2011”.

then signing its car “the most French of Toyotas.” As for the Korean firm, it used the image of a huge Gallic cockerel observing a tiny car to announce the birth of its subsidiary Hyundai Motors France on French soil.

The latter case is interesting since it shows that the visual can sometimes replace words in asserting one’s identity. Hence, Renault uses images of France (bridge of Normandy, French license plate, background showing the city of Le Havre and the Sandouville plant to boast the merits of its Laguna which “has the qualities of its birthplace.” And with the tagline, but in English this time to add an ironic touch: “Imported from France.”

And how are French brands approaching this map of the territory?

Due to the crisis (it always comes back to that), an increasing number of French brands are laying claim to their origin “bien de chez nous” (made right here at home). Most of them, like Thermor or Paraboat, are content with adding a “French manufacture” logo, label or sticker to their advertising. Because France is still a country that makes quality products. Others, such as Optic 2000, see themselves as in solidarity with and engaged alongside French industrial companies. In this case, the “Made in France” becomes “Mode in France”!

For their part, consumers are starting to understand that quality is often synonymous with durability and reliability. Behind these changes in mindset, of course, hovers the Chinese giant, major supplier of pale-copy or mediocre-quality products. And experience shows that it’s better to buy a French saucepan than a Chinese one that will warp on third use!

But there’s a new phenomenon: the rise to power of what I would call the “regionality” of brands (to avoid any confusion with regionalism). While it’s normal for a Reblochon cheese to evoke the Savoy region or for Elle et Vire cream to provide a reminder of where its name came from (two little rivers in Normandy), it’s much less the case for fish sticks. In its new campaign, Findus commits to local production by spotlighting some of its employees photographed in front of their factory in Pas-de-Calais, with the tagline “Made in Boulogne-sur-Mer and proud of it!” Or Tipiak and its natives of Bigouden in Brittany, guarantors of good taste and product origin. Not forgetting Quézac water which plays on the regional dialect and the legends of Gévaudan (a former French province that became la Lozère after the Revolution).

Likewise, certain banks, like the Crédit Agricole or Caisse d’Épargne, are feeling the need to come closer to their clients by evoking strong regional roots and offering them products adapted to their immediate environment. After the banking crisis, which had a lasting effect on the image of banks in general, this was one way of restoring a humbler, more human, more authentic image and dimension, working on proximity, a key value within this context.

Is this sense of regional belonging rubbing off on the big supermarket chains?

Of course it is. First because all these brands, food brands in particular, can be found at these stores in a head-on fight on the shelves against their competitors from all origins. But also because these supermarkets, whether they’re called Carrefour, Leclerc or Auchan, have started to launch their own products supporting the French food and agricultural industry, regional or local. Hence, depending on promotions, a piece of trout at Auchan is marked “of French origin” while Carrefour, during Carrefour month, was proposing “beef rib of French origin.” Leclerc for its part is weaving local alliances for particular flavors and an “eating local” notion... A veritable “advertising war” against New Zealand lamb, English beef or fish raised in Greece! And which is taking root in consumers’ decisions and acts of purchase.

Are foreign brands doing the same?

Yes, when they can, but without necessarily basing it on a specific region, one that we French would be incapable of pinpointing. And the list is long. Ricola has opted for its beautiful Swiss mountains. Spanish company Alvalle has adopted a Spanish accent for its gaspacho. Ocean Spray entertains us with the Canadian accent of its two comedians wading through a cranberry field. Barilla makes the very most of Italian clichés, music included. Swedish Krispröller, with its name alone, takes us to Sweden with its claim “Sweden does you good.” McVitie’s plays on offbeat British humor for its biscuits. And Tropicana has been taking us to Florida for a long time with Eduardo, its orange grower.

Then there’s the case of McDonald’s, which was a pioneer on the subject. It’s no insult to remember how much this brand has been attacked as a symbol of “junk food.” For several years now, McDonald’s has been working at erasing that image, by advertising on products of local origin: French wheat, potatoes from Northern and Eastern France, French meat, etc. Not forgetting the creation of recipes of French inspiration in Saint-Nectaire or the Cantal. Or even the McBaguette.

Note that this form of advertising, rooted in the home countries, has been adapted by McDonald’s in many countries, including the UK, Switzerland and even China.

National identity of brands: advertising flash-in-the-pan or major trend?

It’s much more than just a fashion effect. And it’s extremely likely that more and more brands will communicate on their origin, particularly in Europe. Once again, everything will depend on the violence and duration of the economic crisis. On consumers’ reactions to a globalization that has shown, if not its limits, at least its perverse effects. On the speed at which the emerging countries rise to power. We’re at a turning point in consumption modes. Buying French (like buying Italian or German for the Italians or Germans) is gaining ground. The absurdity of certain behaviors (eating strawberries flown from Argentina in the middle of February) is increasingly viewed as ridiculous or even intolerable. These are all criteria that will cause us to enter into a new consumption mode. And therefore a new communications mode.

And from there on, any scenario is possible: directly, by proclaiming their French origin loud and strong; more subtly, by trying to tone down their foreign origin; or on the contrary by laying claim to that origin if that proves positive for the Brand. It will depend. On a case by case basis. Because beyond its belonging to a country or a region, every product, every Brand, every market has its own strategic stakes.

Are we moving towards a multiculturalism of advertising expressions? A parade of different languages on our screens (whatever they are)? Or on the contrary towards a return to a single, local language? Ultimately the consumer will have the last word. Accustomed to navigating the entire web, will he create his own language? To be continued...

The absolute quality of the model

If there's a problem, you just add resources, like the 65,000 government workers in the French Education system, the 500 police officers and gendarmes per year following incidents or urban riots (Aix-en-Provence, Toulouse, Amiens, Avignon, etc.), or you create priority security zones, summon a certain CEO to the Elysée, the PSA CEO for example after the announcement of a general plan to eliminate 8,000 jobs.

Each sector respects that recipe.

Work. Job. Training

Job-seekers have represented 10% of the population for more than thirty years. Every month, with the new statistics, the same words, “inevitability,” “endemic crisis,” “nth consecutive month,” “emergency,” “government priority” ... But what kind of thinking has there been over the past twenty years and more about structural mechanisms, industrial choices, orientations and anticipations?

Renaming without changing, an apparently lasting formula.

Following on from Lionel Jospin's “youth jobs” (1997/2002), we have the “jobs of the future” (2013) introduced by François Hollande and Jean-Marc Ayrault; how much will they represent a solution within a context in which, if we include those registered with the Unemployment Bureau doing a part-time job and if we add the overseas departments, 4,871,000 people were looking for a job in November 2012?

Note that, according to economist Philippe Askénazy “youth jobs have played a role in devaluing certain types of diploma, and also devaluing young people themselves and implying that they should inevitably be paid minimum wage at the outset.” Moreover, “youth jobs” also concern graduates³⁰, whereas the “jobs of the future” primarily target young people with no or little qualification, mainly in the sensitive urban areas.

And to be continued, the generation contracts designed to promote the handing-down of knowledge through pairing a young person with a permanent contract / senior kept in the company until retirement, as part of a formalized tutelage system, with tax incentives.

Economy and Finance. Energies

Crude oil prices rose in 2012³¹, the question of an alternative to the salt tax is coming back into the news.

That was the vocation of the TIP (*taxe intérieure pétrolière*), created by the laws of March 16 and 30, 1928: to replace another indirect contribution, the salt tax, the famous “gabelle” inherited from the Middle Ages.

Renamed the TICPE in 2011³² to be extended to energy sources not originating from oil, it seems to be the only possible adjustment variable and a major social stake, as if at symbolic moments (when the price of a liter of gas exceeded 2 euros), politicians were casting a sympathetic but hasty glance at car drivers.

³⁰ 40% of people holding a minimum 2-year higher education degree benefited from a youth job between 1997 and 2002.

³¹ Increases in the price of a barrel of oil result from a combination of climate risks, geopolitical tensions, a growing global population, new emerging and emerged countries, increased demand, limited resources and available capacities, exchange rate, accidents, and of course, financial speculation.

³² *Taxe Intérieure de Consommation sur les Produits Énergétiques*.

In the 1960s, it was more or less clear to everyone, at least the “experts,” that the choice of all-oil would have radical social and economic implications, because it’s the source of almost all liquid fuels and from the naphtha resulting from the refining process come plastics, synthetic textiles, synthetic rubbers and elastomers, detergents, adhesives, fertilizers, cosmetics....

Related to the predictability of the worldwide spread of the consumer society, imagining that the barrel priced at \$25 in 1997 would represent only \$30 in 2011³³ was improbable; so it was hardly surprising to find it established by 2011 at \$95 and \$110 for 2012, pending the impact that could come with a conflict with Iran...

But since sanctuarization is the cult of the intangible, for forty years the alternatives have been treated as a creative fantasy, amusing inventions.

Elsewhere, the development of hybrid engines, automatic speed limiters, an electric car running on water, research on new energies, fuel derived from micro-algae³⁴, geothermal power plants, exoskeletons...

Here, there are some other ideas: occasionally adapting the level of fuel tax to fluctuations in the price of crude oil, reviving the road tax disc (a new formula, since it takes into account the geographic zone and the availability of public transportation to lighten or add to the bill), developing the fuel voucher (inspired by lunch vouchers), offering super bonuses for electric vehicles (7,000 euros) or for hybrid vehicles (4,000 euros).

Pending better ways to counter the increase in fuel prices, the French government decided in late August on a “modest drop” of 6 centimes for three months, shared between the Oil companies and the Distributors (minus three euro centimes per liter of diesel oil and petrol) and the State, which reduced tax by three centimes per liter, in other words 460 million euros, to be recovered with other fiscal resources.

Social affairs. Health

Because the public welfare systems and the hospitals of Paris, Marseille or Lyon are operating at a loss, should the care system be totally redesigned? Rethinking and inventing a new model?

Absurd! Let’s just bring in wealthy foreign patients and charge them higher rates than the ones charged to French patients, and – whatever we do – let’s not change what’s causing the problems.

National education. Higher education. Research

Thirteen years into the new Millennium and maybe it’s time to ask questions about the functioning of educational methods inherited from the 19th century, the reasons for academic failure, the professions of the future, the deification of Jules Ferry, the financial bubble of public and private education, industrial choices.

Alongside this, we have the permanence of no-go areas, de-socialization, the application of laws, justice for minors, etc.

The continuing education of teachers, the creation of 22,100 jobs open to non-government workers in 2013 (16,000 in 2012) and the recruitment of 21,350 teachers in 2014, the questioning of the “masterization” of 2010

³³ Forecast made by the International Energy Agency in 2001.

³⁴ Research conducted by Exxon and Shell in partnership with Synthetic Genomics and Cellana.

which removed the year of on-the-job training and directly confronted new teachers with students, have all been included in the search for new solutions.

Shock: from 2011 to 2012, the number of people registered for the CAPES teaching degree dropped by almost 30%; 706 jobs are vacant in math, English and classics; education is no longer a vocation, the Republic's infantrymen are weary.

The sanctuarization rationale is being revived, with the prospect of secular moralizing at the start of the 2013 school year in the name of "intellectual and moral recovery," because we must "rebuild commonality between the children of France." It links back to the very first principles of the Republic, including in its terminology: "to give freedom of choice, you must be able to tear the student away from all determinisms, whether familial, ethnic, social, intellectual, and then make a choice," with an unambiguous Freudian slip: "les dieux doivent être liés" instead of "les deux doivent être liés" (i.e. "the gods must be linked," instead of "the two must be linked"), in talking about civic instruction and questions about the meaning of life.

Nevertheless, seeing that French Universities and higher education are increasingly in competition with the international offering, from most to least predictable (Cambridge, Harvard, MIT, Yale, Oxford... National University of Singapore, Hong Kong, Seoul, Tsinghua University), is this too depressing?

The Shanghai ranking compares 1,200 higher education institutions on the basis of six criteria: the number of Nobel prizes and Fields medals among former students, current researchers, the number of researchers most quoted in their disciplines, of articles published in Nature and Science and indexed in the Science Citation Index and the Arts & Humanities Citation Index.

Since 2003, these criteria have been neither secret nor opaque; yet in 2012, the leading French institutions were the University of Paris South (Paris 11) and Pierre & Marie Curie University (Paris 6), ranked 40th and 41st.

When making a choice, and for a cost integrating academics, housing and the student's living conditions³⁵, why choose France? A question that both French and international parents are asking themselves with an increasingly tight choice to be made between investment / power of the country / economic and social prospects.

Productive recovery

With regard to industry, what's the point of wondering if a car manufacturing plant built in 1961 corresponds to the state of the world fifty years later, to the power struggles between developed countries and emerging ones, to China's desire for world domination or even the competition between marketing strategies? All you need to do is create a new premium to incite purchase.

However, it's hard to deny the fact that this sector contributed 10 billion euros to the positive French external trade balance ten years ago, for a net loss of around 5 billion euros in 2012.

It's also hard to accept that, with its collapse, France is marking the end of its industrial era, the equivalent to the end of the steel industry, metallurgy and mines.

³⁵ At HEC, education fees are set at 11,900 euros per year, i.e. a total cost of 35,700 euros for the Bachelor's degree plus Master's; in Singapore, the complete education represents 24,060 euros for the double diploma.

In December, 75% of French people considered that the government had lost in its negotiations with the Mittal steel company over keeping its blast furnaces in Florange open.

Not long beforehand, the Minister had declared that he no longer wanted Mittal in France *“because they didn’t respect France,”* using methods that *“stem from a non-respect of commitments, from blackmail and threats.”*

Through a failure to anticipate and innovate, how many billions have been spent in shoring up on the one hand and bailing out on the other, if capping and reducing, preserving and maintaining are the new mantras?

Sanctuarization and the canned foods have much in common: since 1853, this specialty of the Bonduelle company, particularly for canned vegetables sold under the Cassegrain brand, has held a 30% market share in France.

From sanctuary to museum

One of the meanings of *“sanctuary”* is a space benefiting from a set of measures that guarantee and protect it, safeguard it, keep it closed to non-believers or intruders, a territory removed from hostilities during an armed conflict. The common points: intangibility and permanence.

Postcards

The news is teeming with sanctuarization symbols: in Paris, the *“reconquest of the riverbank expressways”* aims to open up access to the banks of the river Seine to pedestrians and cyclists, while making the vehicle lanes narrower, with lights to slow down the traffic. At the same time, vehicular traffic will be banned on the left bank, with several kilometers closed between the Point de l’Alma and Pont Royal bridges: *“In spring 2013, more than 2 hectares of walkways, between the Musée d’Orsay and the Pont de l’Alma, will offer everyone new opportunities for strolls, special events and leisure activities.”*

Those two words, strolls and special events, used as justification for these changes, take us on a voyage through time...

Perfectly out of step with the everyday reality of the working people who occupy the 1,773,000 jobs in the capital, they correspond to Paris’ position as a tourist postcard and a permanent homage to Baron Haussmann (1809-1891).

The paradox is that Georges Eugène Haussmann revolutionized Paris, and his project involved issues and approaches that led to the alteration of over 60% of the urban surface area.

With the cholera epidemic of 1832, Napoléon III entrusted him with the task of restructuring Paris, drawing inspiration from the western districts of London, to clean up and embellish a dark and dirty city, still somewhat rooted in the Middle Ages.

Echoing the theories of the hygienists, Haussmann would launch the renovation project with a veritable advertising campaign: *“Paris embellished, Paris expanded, Paris cleaned up.”*

He had a method for that: an outline based on the straight line, which involved amputating or destroying everything along its axis, Marché des Innocents, the church of Saint-Benoît, etc.

Perspective rammed its way through boulevards and avenues, from the Place du Trône to the Place de l'Étoile, from the Gare de l'Est to the Paris Observatory, from the Place de l'Etoile to the Bastille, with the Champs-Élysées being the best illustration.

Squares and gardens replaced quarries, villages or hills, like the parks of Buttes-Chaumont, Montsouris, Monceau, les Batignolles, etc. La Chapelle, Montmartre, Auteuil and Passy, all of them independent communes beforehand, were integrated into the capital.

Meanwhile, water conveyance channels appeared, along with the network of drains, and two stations were built (Lyon and Est).

Bourgeois society was the backdrop to the project, with investment properties and private mansions as the references, in a style that standardized construction, creating a homogeneous overall vision.

Social structure was reflected by the hierarchy of buildings, with the mezzanine floor, the *étage noble* reserved for wealthy homeowners, maid's rooms, etc.

One common point with the Paris of 2012 was the entry price. As Haussmann wrote in *l'Empereur*, *"to a certain extent we must accept the high price of rents and food as a useful aid in defending Paris against an invasion of workers from the provinces."*

Well-being, order and security underscored the accomplishment of the aesthetic project, which led to the alignment of the Bois de Vincennes and the Bois de Boulogne as the city's green lungs and "walking" places.

Attila the liquidator, extravagant crook, or visionary genius, his building projects were passionately adulated or criticized.

One hundred and fifty years later, what remains of his work and of the style that inspired him? What is the real cost of sanctuarizing historical Paris?

In terms of heritage, Paris does offer a fairly exceptional decor, an unchanging setting, a crystallized historical space that is ideal for sunset photography.

On a technical level, most of these buildings are disasters in terms of heat insulation and soundproofing, dirty and toxic, with staircases that suck up flames when fire breaks out, and the costs of bringing them in line with safety standards are increasingly high.

With most of the renovations coming with a shift from residential to office, many housing units disappeared from circulation, residential property became rarer, with an average price per m² equivalent to 9 times the minimum wage, or even 15, 20 or 35 according to neighborhoods, "boboization," the distancing of populations unable to envision a purchase in the city, the saturation of public transportation³⁶, etc.

³⁶ Developed between 1969 and 1994, the RER A suburban train line is clearly no longer able to deal with the daily traffic of 1.2 million travelers twenty years later; same thing for line B, created in 1977, with 950,000 commuters daily.

While countries compete over building height³⁷, like the aristocratic Renaissance families of Florence, the future towers planned for Paris in the new Masséna district in the 13th arrondissement comprise no residential units: the “Duo” program (110,000 m²) will consist in offices, hotel, businesses and stores, with the highest tower reaching 180 meters.

The last constructions to mark a total break in style from their environment, for example the Centre Beaubourg or Buren columns in the Palais-Royal district, respectively date from 1977 and 1986.

There are countless examples of gaps between the needs of the years to come and the sanctuarization approach, both in Paris and in most of the provincial cities.

In Japan, Kyoto was the imperial capital – as its name 京都市³⁸ indicates – from 794 to 1868. The transfer of the Emperor’s residence to Edo during the Meiji restoration meant changing Edo to Tokyo (東京³⁹ Japan’s administrative capital since 1868).

In France, the very idea of moving the capital would be viewed as ridiculous beyond belief.

Nevertheless, the reasons that pushed the National Land Agency to this point in Japan are very similar to the situation in Paris and the “TGV cities”: increasingly unaffordable costs of property and rents, shortage of residential units, saturation of public transportation, pollution, stress, etc.

There were other motivations, financial, technical or administrative, and symbolic too.

The first are linked to the memory of earthquakes (Tokyo is situated on the edge of one of the highest-risk seismic zones on the planet; in 1923, 140,000 people died when it was destroyed) or the Fukushima earthquake in 2011, which led to plans to evacuate 35 million inhabitants⁴⁰.

The second correspond to the intention to “create a new society project for the 21st century.” For Yoshinosuke Yasoshima, President of the University of Teikyo Heisei and a member of the governmental commission for the relocation of the capital, “Japan has changed every seven hundred years, these changes have always corresponded to key periods in its history, and today the country needs a new breath of life.”

The sanctuarization of the model doubles up with what it was in the past. It explains why France is one of the most timid countries when it comes to architecture, as though its heritage prevented it from being audacious in any way.

In Evry-Courcouronnes, for example, the President of the Academy of Architecture, Thierry Van de Wyngaert, Jean Nouvel and Rudy Ricciotti started a petition, “Must we demolish the heritage of the 20th century?” against the planning project presented by the Agence Nationale de Renovation Urbaine (national urban renovation agency).

³⁷ In Dubai, the Burj Khalifa tower measures in at 829 meters and the Mecca Royal Hotel Clock Tower at 601 meters; in Canton, a 600-meter tower is used for audiovisual broadcasting; the Doha Convention Center (Qatar) reaches 551 meters; in Moscow the Crystal Island skyscraper project is slated to be the world’s biggest building in terms of floor surface area (2,500,000 m² and 450 meters high).

³⁸ “The capital city.”

³⁹ “Capital of the East.”

⁴⁰ The agglomeration is 220 kilometers south-west of the nuclear power station where the disaster occurred.

Objective: preserve an abandoned hospital and an 80-unit residential building built in 1983 by Paul Chemetov, destined for destruction to open up some sixty districts in the Essonne department and create almost 850 new government-funded housing units.

Question: if everything is about heritage, should we develop the single-child policy of China or Singapore to limit the population and the demographic changes which are, indeed, incompatible with what our heritage can provide?

Museographies

The question of giving France a breath of fresh air serves as a counterpoint to fears of a decline. Which explains the demand for symbols of creation, innovation, audaciousness, change, particularly among the youngest people.

Napoleon III would have been appalled to see London as the capital of the 2012 Olympics, he who dreamed of seeing Paris get ahead of the ex-capital of the British Empire, political center and headquarters of the Commonwealth.

But Paris lost for the third time in 20 years. The film intended to convince the 2005 jury is a perfect testimony to sanctuarization: long flight over Paris from the Seine, nostalgic song by Charles Trenet (Autumn and Vervain), views from the La Rochelle Forts and landscapes of old-style France, etc.

Of course, there are other reasons, a more efficient lobbying strategy, systematic demolition of the Parisian project, a reminder of the 2005 strikes, stigmatization of the “No” vote during the Referendum on the European constitution project, country of strikers, etc. The British did everything to ensure that France lost.

But they also played the cards of innovation and radical change with their own film: images of ultramodern architectures integrated into the historical heritage, special effects and holograms, a hymn to the melting pot society, a very personal evocation by Sebastian Coe⁴¹, universal message from Nelson Mandela, the British offered up a cosmopolitan utopia that was the very opposite of French nostalgia.

Elsewhere, in Guédelon, the building work started in 1997 to build a fortress using medieval techniques continued, as in 1228, when the future Saint-Louis had just been consecrated King at Reims, with the regency of the kingdom being ensured until 1235 by his mother, Blanche de Castille.

On July 31st, François Hollande envisaged a candidacy for the 2024 Olympic Games; it will be interesting to see the approaches adopted in the emotional and symbolic expression of the candidacy to win the vote.

⁴¹ British athlete who became Lord Sebastian Newbold Coe, a Conservative party politician, head of the candidacy committee for the city of London for the organization of the summer Olympics in 2012.

Icons

Made in “chez nous”

There’s nothing better than intangibles in quicksands, like a sort of ford for jumping from landmark to milestone.

Brands are capitalizing on safe buys and consistency (one French word for consistency, “constance,” has been among the “best of” first names in France for the past two years), leading to the systematic use of a line of argument based on original and founding products such as the Big Mac or the “little black dress” (launched by Guerlain in March 2012).

The audience for the TV program “[Le village préféré des Français](#)”⁴² fervently confirmed this craze, with the small town of Saint-Cirq-Lapopie embodying the quintessence of the unchangeable, like the idols of the Thirty Glorious Years, Joe Dassin, Alain Chamfort, Sheila, etc.

On the cover of “Parisien Magazine no. 5,” the Minister of Productive Recovery was quick to pose wearing an Armor Lux striped sailor shirt and a Herbelin watch, while brandishing a Moulinex blender. And in the inside pages we find Arnaud Montebourg in a suit with French-made chairs.

Result for the sailor shirt, offline sales grew by 75% on the following Saturday and Sunday and multiplied by three on the Internet compared to the same weekend in 2011!

Handing down, the family, heritage, these notions are all, more than ever, at the heart of French people’s concerns: hexagon, model, museum go well together and no longer sanctuarize exceptional things, but rather French perfection in terms of its normalcy, its calm: after time, after space, peace and quiet is the new Grail.

⁴² Presented by Stéphane Bern on France 2 on Tuesday June 26, 2012, the program attracted 4,729,000 viewers (i.e. a 19.6% audience share), ahead of “Dr. House” (TF1) watched by 3,912,000 people (15.8%).

INTERVIEW

Florence de Bigault, Ipsos Marketing

To your shopping carts, citizens! What's the latest on patriotic consumption?

During the presidential campaign, the question of national industry came up in the debate, with candidates placing the emphasis on the “quality and know-how” of products “made in France.” Does this debate resonate with consumers?

Recently, I was moderating a focus group and the participants had just been discussing the value of giving priority to French-made products in their purchases. The first one, a pharmaceutical engineer for some thirty years, explained that he felt increasingly concerned by the origin of what he buys, since he wants to help keep jobs through a socially responsible gesture, just as he was already paying attention to the carbon footprint and ethical aspect of his purchases. The woman next to him, who'd been working as a shop assistant for 50 years, approved but admitted being caught between her desire to “buy French” to fight “relocations” and a wallet already pushed to its limit by the crisis. Finally, for the third participant, a young man, recently hired by a phone company, the origin of his products was of no importance. He proclaimed loud and clear his right to “treat himself with his own money,” arguing that the most important thing for him was to buy brand names of high quality.

As the debate heated up, one participant said he felt helplessly confused: “as a consumer, I worry about the conditions in which those poor people over there manufacture what I’m buying, and as a salaried worker, I worry about whether my job won’t be taken over by those poor people who work over there... I really feel like nothing’s working right any more!”

This example clearly illustrates how a growing number of our fellow citizens feel caught, but also the changes that are taking place in the “consumer’s mind.” It has to be said that the situation is complicated for the consumer-citizen. Countering the government’s argument on the duty to “buy French” to get out of the crisis is a “Made-in-France” that is no longer truly synonymous with affordable, quality products..

Today, 70% of consumer goods sold in retail stores in France are produced in China, North Africa or Eastern Europe. And the “Made-in-France” product seems to belong to a nostalgic past in which France was opening up supermarkets in the shadow of factory chimneys, where the supermarket cart was compatible with the worker’s lunchbox.

Nowadays, the question of economic patriotism is no longer taboo and is making its timid entry into our shopping criteria, admittedly still a long way behind quality and price. After decades of a consumer society, a share of French people are gradually becoming aware of the stakes, putting consumption back in the center of the societal debate.

The results of a survey conducted by Credoc⁴³ bear witness to this trend. Two-thirds of French people are said to be willing to pay more for industrial products made in France, as opposed to less than half of them five years ago. Opinion polls seem to corroborate this regain in consumer interest in the Made-in-France. One recent Ipsos survey⁴⁴ shows that 78% of French people attach importance to the fact that their holiday meals are made up of French products. This growing interest in the Made-in-France has given products manufactured in France a little

⁴³ Cr dod Consumption and Lifestyles. No. 239, May 2011.

⁴⁴ Ipsos survey for France Bleue, December 2012.

boost, as observed by the Assembly of French chambers of commerce and industry (ACFCI), whose role is to support businesses.

Are businesses interested in this phenomenon?

Yes, the trend has not escaped Net entrepreneurs, and the Madine France website (www.madine-france.com) was recently created to give consumers direct access to French-made products, hence providing a window onto hundreds of local products.

Le Slip Français (French underwear site), Les ambassadrices, CityCake, Archiduchesse, Alittlemarket, the number of commercial websites promoting local manufacture is constantly growing.

The supermarket world is starting to take an interest in the subject. Following in the tracks of Système U, which boasts that 80% of its food aisles consist in French-made products, Leclerc is considering highlighting French-made products in the very near future through the use of “French flag” labels. Made In France Expo, the first trade show open to the general public and devoted to 100% French-made products, opened its doors in Paris last November.

Finally, with a view to framing and clarifying Made-in-France products, a new “Origine France” label has just been launched. Among the first to receive the label, the Atol opticians’ chain has already integrated it into its TV advertising.

The purchase of “Made-in-France” products is still far from being massive, is this an epiphenomenon or the start of a deeper shift?

It’s still too early to say, and we will need to pay close attention to how the intentions to buy Made-in-France measured by most opinion surveys over the past two years actually translate into sales figures. Nevertheless, the phenomenon seems to date back to before the economic crisis that French households are experiencing now. After an Ipsos survey conducted in 2004⁴⁵ on European households, 77% and 67% of those polled respectively took into account the manufacturing conditions and country of origin. The French respondents (72%) were the most sensitive to manufacturing origin, ahead of the Italians (69%) and... far ahead of the Germans (48%).

When we questioned consumers attracted to Made-in-France in greater depth, we saw that their motivations are the ones already observed in many forms of socially responsible consumption, and which have been progressing over the past ten years.

The patriotic consumer is thus joining the movement triggered by the organic store customer, the consumer of ethical, fair-trade products, the locavore, the eco-label fan.

This movement really seems to be displaying strong signals that decision-makers, and most of all companies, can no longer ignore:

- The need to find new sources of satisfaction in the act of purchase, other than the utilitarian aspect, pleasure or status. Solidarity, social responsibility, environmental concerns are enabling consumers to restore meaning to their consumption, to feel more in harmony with themselves and their values.

⁴⁵ Ipsos survey February 2004. Corporate ethics: European consumers have doubts.

- *A means to say no to an anonymous globalization that is increasingly viewed as developing at best without them, and at worst against them.*

“Our purchases are our jobs,” was already the slogan of a campaign by the Chambers of Commerce and Industry in 1994 in a France headed for de-industrialization.

The appeal of the “Made-in-France” product is a part of all that: it provides reassurance about its safety, its ecological impact, the working conditions of the people producing it, observing social norms. In greater depth, it places the production of goods and their consumption back inside a schema that is logical, comprehensible and bearable for the “disoriented French”⁴⁶ who are increasingly demanding economic protection.

⁴⁶ *“La France déboussolée,” by Robert Rochefort. Ed. Odile Jacob, 2002.*

French Riviera

“On vacation on the Côte d’Azur” was the title of a collection of postcards devoted to the South of France in the early 20th century. Cavalaire, Cavalière, le Rayol Canadel were all famous resorts, and of course Monaco, Menton, Nice, Cannes...

The geography of the dream hasn’t changed and was enriched by the arrival of Saint-Tropez in the 1960s. This part of the Mediterranean Basin now has the vocation of becoming an exclusive region dedicated to the high-end: Monclerc has opened a store for its down jackets in Cannes, where long-established Chanel, Dior, Hermès, Prada and Vuitton are constantly expanding their boutiques; Tiffany & Co has already arrived in Nice. The hotel and restaurant trades aren’t being left behind either; their challenge: achieving the prestige of a Michelin “5 stars.”

The appeal of Paris is as powerful as ever, and real estate exceeding three million euros no longer seems to concern French people according to the Director of the Barnes agency, which specializes in high-end residential. This also brings a small issue linked to the fiscal fears of international clients regarding assets located in France, and nationals tempted by tax exile...

Another sign that luxury is on a roll, the debate fired by the changes in the decoration of traditional Christmas shop windows: fewer toys, dolls and teddy bears, and a lot more references to fashion and design, whose extravagant prices could come as a surprise to a “popular” audience (Le Printemps with Dior, Galeries Lafayette with Vuitton and a Christmas tree decorated with Swarovski crystals, BHV featuring Alexis Mabille...).

Luxury⁴⁷ once more, in the biggest outlet⁴⁸ in France at “One Nation” in Plaisir (Yvelines department, near Paris), which was opened in October 2013 by the real estate company Catinvest. After Barcelona, Brussels, Dublin, London, Madrid, Milan/Bologna, 140 boutiques over 24,000 m² with a glass roof, a structure inspired by Gustave Eiffel and French-style formal gardens. Its goal: to create “the Avenue Montaigne of outlets” and attract 20 million visitors a year including 40% of foreign origin, and particularly Asian⁴⁹

France has thus returned to its most reassuring and most fundamental references: Eiffel and Versailles. Two solid buttresses for the sanctuary...

⁴⁷ <http://www.chicoutletshopping.com/fr/company/about-us>

⁴⁸ *Outlet: a group of stores operated by various brands with a selection of products from the previous seasons sold at 30 to 70% off the original prices.*

⁴⁹ <http://m.lesechos.fr/industrie-services/le-plus-grand-outlet-francais-de-luxe-ouvrira-en-octobre-2013-0202388787147.htm>

Shocks

Contrasts

Seen from the outside, the image of France is increasingly paradoxical.

On the one hand, a country that is tending more and more to identify with its postcards, as if fiction needed to go beyond reality or make up for it: romanticism over incivilities, sentimentalism over arrogance, flea market over the Internet, Versailles over Marseille?

On the other, a country allergic to change, an administration viewed as bureaucratic, a dissuasive tax system, a disputable quality of life, despite real potential given how well France has held up within the European crisis context⁵⁰.

While tourism is on the rise (+ 3.8% of foreign clients from 2011 to 2012⁵¹, + 15% of Chinese tourists within the same period), the opinion expressed by tourists after their visit can be cruel, particularly in Paris⁵².

The survey on world tourist capitals conducted by TripAdvisor (75,000 reviewers for the TripAdvisor website questioned about nine subjects) is not very flattering.

Paris comes in 33rd out of 40 cities for “**friendliest locals**” (against Cancun, Tokyo and Lisbon; 30th for “**friendliest taxi drivers**” (Vs. Tokyo then Cancun and Singapore), 29th as concerns “**taxi services**” (Vs. Singapore and Dubai), 22nd for “**safest city**” (Top 5: Tokyo, Singapore, Dubrovnik, Zurich, Vienna).

New York comes out top of the list for “**shopping**,” ahead of Bangkok and Dubai. London is 4th (the highest placing in Europe, with Paris 11th).

Concerning “**cleanness**,” Tokyo is the number 1, Paris 24th... In fact, transportation is the only area in which Paris shines a little, coming in 11th for “**ease of getting around**,” (with Zurich coming out top).

On the whole, in terms of the most revealing item, “**value for money**,” Lisbon is no. 1 ahead of Budapest and Bangkok, with Paris in 34th place.

The attractiveness of France⁵³ dropped by 4% in one year. 2012 saw France go from second to third place in the list of European countries, whereas the number of international investment projects has increased by 4%.

The UK is at the top, with 679 foreign investment projects and 29,888 jobs; Germany in second position counts 597 projects (+ 7% from 2010 to 2011). *“France is losing out on both scores: 540 investment projects (-4% in one year), 41% of which are mere extensions of existing operations and 13,164 job creations (-12%), i.e. only 8% of the European total.”*

⁵⁰ 70% of investors questioned by Ernst & Young think “that it’s possible to set up in France and develop business there.”

⁵¹ MKG Hospitality: “the occupation levels in Paris intramuros exceed 91% thanks to the foreign clientele, notably. The occupation rates for hotels dropped by 1% on the Brittany coast, by 2.1% on the Côte d’Azur compared to last year (July 1st through 24th), but have remained stable in Languedoc-Roussillon and have even progressed slightly in Aquitaine (+0.4%). Hotels on the Channel coast are doing well, with frequentation levels rising by 3.1%, playing on their closeness to London.

⁵² <http://www.lesechos.fr/entreprises-secteurs/service-distribution/actu/0202448084178-tourisme-paris-tres-mal-notee-dans-le-classement-tripadvisor-520355.php>

⁵³ <http://www.ey.com/GL/en/Issues/Business-environment/2012-European-attractiveness-survey>

France has little appeal for the emerging countries, with 43% of investors considering that *“its positioning on globalization is ill-adapted compared to its competitors.”*

The drop in Research & Development sites is spectacular, with only 29 projects, down 36% in a period of one year.

The Ernst & Young study drives the nail home: *“if France is losing its second place, it’s not due so much to its own weaknesses as to the strategies of its main competitors. The UK and Germany have taken note of the new global situation, restoring their competitiveness and enhancing their appeal.”*

The ranking of the World Economic Forum (WEF) held in Davos brings no improvement⁵⁴. From 20th in 2011, which is far from brilliant, France has dropped back one place: for the first time in thirty years, it is out of the Top 20.

Twelve criteria determine the overall ranking: government institutions, infrastructures, macro-economic environment, quality of the health system and elementary education, higher education and training, level of consumption, performance of the job market, financial development, technological achievements, volume of exports, interactivity of processes, innovation.

Ranking fourth on an international level for the quality of its infrastructures (transportation, communications, electricity network), France takes 21st place for the quality of its health system, primary education, higher education and training.

Judged as disastrous, practices in terms of recruitment and layoffs (141st out of 144), relations between employers/employees (137th), budget balance (111th). Translation and comments: a country devoid of flexibility, relatively deaf to the stakes involved in globalization, with ill-adapted regulations that limit its own expansion.

The Global Competitiveness Index 2011-2012 rankings and 2010-2011 comparisons

Country/Economy	GCI 2011-2012		GCI 2011-2012 rank among 2010 countries	GCI 2010-2011 rank
	Rank/142	Score		
Switzerland	1	5.74	1	1
Singapore	2	5.63	2	3
Sweden	3	5.61	3	2
Finland	4	5.47	4	7
United States	5	5.43	5	4
Germany	6	5.41	6	5
Netherlands	7	5.41	7	8
Denmark	8	5.40	9	6
Japan	9	5.40	9	6
United Kingdom	10	5.39	10	12
Hong Kong SAR	11	5.36	11	11
Canada	12	5.33	12	10
Taiwan, China	13	5.26	13	13
Qatar	14	5.24	14	17
Belgium	15	5.20	15	19

⁵⁴ <http://reports.weforum.org/global-competitiveness-2011-2012>

Within this context, it's hardly surprising that an increasing number of students are opting to go international, as shown by the study on the professional goals of 1,600 students from 16 of the greatest French schools: 23% *“are primarily looking”* for their first job outside France, while the number of international volunteers increased by 57% between 2006 and 2011⁵⁵.

The provocative article, *“Youth of France, your salvation lies elsewhere: get the hell out!”* in *Libération*⁵⁶, puts a radical spin on the consequences and notes an alternation effect in its conclusion: *“Leave, come back, leave again, come back again. One of the key virtues of your travels will be to gain from your enlightenment and finally reconcile France with the reality of the world around us. Too often still, our country does indeed function in a bell jar, with the topography of the public debate rooted in a curious form of schizophrenia in which major global upsets produce nothing but minor debates in France. The increasingly wide gap between the actual situation of France and the proposals coming from its leaders will be filled by no one but yourselves, who, through your travels, encounters, discoveries, will be able to dig this country out of the moronic state generated by the intellectual autarchy that has reigned here for the past thirty years at least.”*

As regards foreign students, fewer of them are choosing French universities: after the boom of the 2000s (+ 74.8% between 1998 and 2005), the progression has been between 2 and 4% per year since 2005, and was only 2.3% in 2010.

⁵⁵ <http://etudiant.lefigaro.fr/les-news/actu/detail/article/les-etudiants-du-sud-de-l-europe-fuient-la-crise-au-nord-116>

⁵⁶ Félix Marquardt, founder of *Diners de l'Atlantique* and the *Submerging Times Dinners*; Mokless, rapper, author and singer, member of the group *Scred Connexion*; Mouloud Achour, journalist (September 3, 2012).

Pavane

Re

Redress, rebuild, reindustrialize, relocate, relaunch, recenter, redevelop, reboot, redefine, redistribute, restructure, revive, reshuffle, restore reasons to hope, reestablish.

Or create, change, invent?

While a crisis is viewed here as something abnormal, with time-duration seeming linear and unchangeable, other countries don't reason on the basis of the tight agenda of an idealized model, with experts imposing the slow-tempo pavane⁵⁷, "30" Glorious years, or "40" Lousy ones.

Some even delight in noting that the 1929 crisis gave rise to Fortune magazine, Kellogg's, PgG, Heinz and Nestlé, that McDonald's, Sony and Apple appeared in the 70s after the oil crisis, just as Google, Amazon, Starbucks and eBay appeared after September 11, 2001.

French tension is so visible that it has become a subject of alarm or humor, as in Germany with an article in Der Spiegel, "[France's Obsession with the Past Hinders Reform](#)" (Mathieu von Rohr), or in the US when The Economist headlined in March 2012 with "[France in denial.](#)"

In question here: France's capacity to reform itself, the influence of social shock absorbers and the number of government workers, competitiveness, etc.

The tax creation reflex⁵⁸, like so many other patches over cracks, has incited European political leaders to ironize about the tax system. According to the Mayor of London, "[never since 1789 has there been such tyranny or terror in France.](#)"

After Bernard Arnault in September, the "[Depardieu affair](#)" re-launched the tax debate in late December, when the actor announced that he was going to live in Belgium, to escape the French tax system, was selling his Parisian home (50 million euros, 1800 m² in the 6th arrondissement) and several hectares of vineyards in the Hérault department.

A consequence of the "[tax madness](#)"⁵⁹ for the head of MEDEF, the country's largest employers' union, or "[overkill](#)" for Jean-François Copé, a "[scandalous](#)" attitude for the Minister of Culture, "[rather pathetic](#)," for the Prime Minister, who received a direct response from the actor in the Journal du Dimanche⁶⁰.

Feeling "insulted," he wrote: "[I'm giving you my passport back. We no longer have the same homeland, I'm a citizen of the world,](#)" while taking steps to obtain a Belgian passport. Soon after, the Alain Afflelou establishment in London extended the debate on tax exile.

⁵⁷ The pavane (derived from the Italian padovana [Paduan] or "pavon," Spanish for peacock) is a slow dance, characterized by two simple steps and one double step forward (marche), followed by the same thing backwards (démarche).

⁵⁸ In Germany, the marginal income tax bracket is 27% as opposed to 64% in France. In Belgium, there is no wealth tax, nor capital gains taxation and death duties are 3% as opposed to around 40% in France; yet has that meant that the French live 13 times better than the Belgians?

⁵⁹ Among the most recent, the new capital gains tax on the sale of property (aside from the primary residence). In addition to the 19% and 15.5% of social charges, another 2% will be applied from 50,000 € (one out of two transactions according to the FNAIM), + 3% for 100,000 € and + 6% for 250 000 €.

⁶⁰ <http://www.lejdd.fr/Societe/Depeches/Injurie-Depardieu-rend-son-passeport-francais-581255>

Not long before that, François Hollande had talked about the fact that *“each of us must behave ethically, whatever his or her profession,”* and on the need to review tax agreements with other countries.

Concerning ethics, it’s hard to imagine revisions on a par with that, which would assume for example that all households contribute to taxes⁶¹, a reform of the taxation system and status of temporary show-business workers⁶² or of those with “ouvrant” and “ayant droit” status, i.e. employees who enjoy certain advantages, depending on company agreements⁶³.

While the presidential campaign was underway, international observers were surprised to see debates focused more on redistribution than on wealth creation.

Over 6 months after François Hollande’s election, in *“Le Déni Français”* (Lattès), Sophie Pedder explores why the French are *“the last spoiled children in Europe,”* a title which *“should not be taken at face value. [Her] intention is not to make the French feel guilty. Even less so given that politicians, both right and left, have consistently encouraged the population in the illusion that everything can continue as it did before, whereas France can no longer afford to remain motionless. Certain very credible predictions state that France, currently the fifth world power, will be relegated to 9th place by 2020.”*

The prognostic is extremely incisive, whether in economic or political terms: *“the scope and generosity of the French social system, conceived after World War II, exceeds the level of wealth the country has created. Funded by loans, it has become unsupportable. The shock will have a cultural dimension too in the sense that the very idea of social progress will be called into question.”*

The ideological sanctuary of the 30 Glorious Years must prepare itself for the cracks of the reality principle: *“having the vision of continued and irreversible progress, the French consider that the number of advantages they enjoy can only be added to over time: after retirement at 60, the 35-hour working week, etc. But this progress is being radically called into question by the country’s debt and loss of competitiveness. The French must prepare themselves for the future disappearance of certain of their privileges.”*

In November, following Standard & Poor’s ten months earlier, the Moody’s rating agency downgraded France’s financial rating from AAA to AA1 while placing it under negative surveillance. The cause: a convergence of factors threatening the goal of containing the public deficit at 3% of GDP, which is becoming unattainable:

- The reduction in growth potential due to a lack of competitiveness,
- The rigid nature of the unemployment market,
- The risks linked to the amount of public spending and debt (respectively 57% and 91% of GDP),
- The 30 billion euros in tax increases that have brought the tax withholdings introduced since 2011 to 3% of GDP,
- The 10 billion euros of extra public spending (retirement at 60, hiring government workers, increase in minimum wage and the back-to-school allowance),
- The specter of a recession in 2013 with the drop in activity in the euro zone,

⁶¹ 1 out of 2 fiscal households are not subject to income tax payment.

⁶² In 2009 for example, the 100,000 temporary show-business workers received 1.3 billion euros in benefits for 225 million euros in contributions collected, which explains the plans for radical reform, the French General Accounting Office reminded people that temporary show-business workers represent 1/3 of the total deficit for unemployment insurance, whereas they represented only 3% of job-seekers in 2010.

⁶³ Notably in the air or rail transport sectors, since certain reductions are assimilated by the social security administration with benefits in kind, with resulting adjustments. At Air France and its subsidiaries in 2008, 700,000 people corresponded to “ouvrant” status, and were thus partially exonerated.

- The threats linked to the loans and guarantees accorded by France to European countries in crisis that are incapable of reimbursing it, which implies giving up on the debts held by the ECB in relation to the Mediterranean countries and Ireland.

Good news came in mid-December, the FITCH agency maintained France's AAA rating.

Anachronisms

Certain notions such as "economic patriotism," "wealthy," "privileged few," "executives," "summer hours," "summer vacation," "chasse-croisé" (the heavy traffic flow in both directions as vacationers come and go), "riff-raff" etc., have imposed themselves in the media and in debates as words designating intangible realities.

"Middle classes" is a perfect example. Officially, the French national statistics institute INSEE situates this between the poorest 30% and the wealthiest 20%.

So it comprises 50% of households with incomes between 1,684 and 3,907 € a month after tax and social charges. But it also includes the intermediate occupations (primary school teachers, nurses, technicians...), some artisans, retailers and owners of small businesses, given that these two categories represent only half of the middle classes: a part of white-collars, manual workers and senior executives belong to it too.

In terms of personal positioning, when we ask French people to situate themselves, two-thirds believe that they belong to the middle class: 80% of people earning more than 4,000 € a month and 82% of senior executives and professions believe they belong to the middle class; in contrast, 42% of those earning under 2,000 € a month and 45% of manual workers do too.

"Republican model," integration, secularity are being disrupted by a series of incidents in reaction to a reputedly Islamophobic film, "The innocence of Muslims," by the call to behead the director of Charlie-Hebdo following caricatures of Mohammed, by the dismantlement of an Islamist group accused of anti-Semitic actions, by plans to transform churches into mosques, the problems linked to ritual slaughter, or the occupation of the building site for the future mosque in Poitiers by the extreme right movement "Génération identitaire."

In late October 2012, 60% of French people thought that the visibility and influence of Islam were "too great" (+ 5% compared to 2010) and 43% viewed Islam as "a threat." 43% claimed to be opposed to the building of mosques (22% in 2001), 63% against wearing a veil in the street (32% in 2003), 45% against the election of a Muslim mayor in their commune (35% in 2001).

And last but not least, 68% attributed problems with the integration of Muslims to their "refusal to integrate."

In 2010, Christophe Guilluy's book "Fractures Françaises" (Bourin) warned of the need to "propose a brand new social geography lesson. Using his discipline as a basis, he reveals a situation of the working classes very different from the usual caricatured representations. Their development outlines a France eaten away by social and cultural separatism. Behind the illusion of a soothed society, a deep crisis is taking root in terms of living together. Political solutions and a new attitude are possible, as long as the new antagonisms that are transforming society are publicly recognized and discussed. This is urgent: if reason doesn't win the day, the pressures of globalization that are expanding social and cultural fractures could explode the republican model."

Certain cracks are more frivolous, at least in appearance, like the tweet from Valérie Trierweiler, considered by many people to have *“destroyed the normal image of François Hollande,”* with 2 out of 3 French people disapproving of her action...

The famous tweet brought interpretations that were even richer for the fact that several books, including *“Entre deux feux”⁶⁴* and *“L’Ex,”⁶⁵* helped crack the surface of normalcy with some heavy blows in the tabloid press, involving all sorts of rumors regarding the intentions of the President of the Republic, leaving Valérie Trierweiler for Ségolène Royal, for example.

Another crack, the speed with which criticisms of softness, slowness, indecision, procrastination came tumbling down on François Hollande after the favorable comments about his reasonable and conciliating character, calm and measured, unlike the agitation, hyper-presidential frenzy or nervousness of Nicolas Sarkozy.

With the summer vacation period over, page one of Le Point headlined with *“Are we waking up?”*, Marianne: *“Hollande get moving, there’s a fire!”*, Courrier International: *“So, are we going to move?”*; after making fun of *“Hollande’s cuckolds,”* L’Express segued with *“And what if Sarkozy was right?”*; a short while before that, Figaro Magazine ironized over Hollande’s roots in the Corrèze department, a *“radical region that has turned indecision into a cardinal virtue in politics.”*

Combined with unfavorable surveys and unflattering photos, *“Hollande bashing,”* which started in 2012 and was denounced among others by Eva Joly, has done nothing to promote projection into values of confidence, desire, movement.

On April 15, 2012, François Hollande stated: *“the Elysée Palace will not commission any more surveys.”* The cause: the 9.4 million euros corresponding to the qualitative and quantitative studies conducted during Nicolas Sarkozy’s five-year term, a budget much criticized by the Left at the time.

A crack appeared in mid-September, the Presidency announced an agreement with the Government Information Service (which depends on the Prime Minister) to be able to commission surveys on the image and action of François Hollande through its intermediary.

More cracks in October, with the debates on the Social VAT or the Social CSG (which is already social by definition) putting measures envisaged by Nicolas Sarkozy back on the agenda...

And again, cracks in November, with the “20 billion,” the tax credit accorded for three years to give a new boost to competitiveness, a measure that destabilized French people close to the Front de Gauche and surprised many others.

On the one hand, companies are made responsible for the situation due to bad strategic choices, relocations or risky speculations; on the other, the brunt of the job creation required to re-industrialize France falls on them: a paradox or an innovation?

Cracks in December, with François Hollande’s and Jean-Marc Ayrault’s fall in the Ipsos Barometer⁶⁶ for Le Point: - 6% for Hollande, - 5% for Ayrault between November and December.

⁶⁴ Anna Cabana and Anne Rosencher, published by Grasset.

⁶⁵ Sylvain Courage, published by Editions du Moment.

⁶⁶ On December 7 and 8, 2012, 953 people making up a national sample representative of the French population aged 18 years and over. Phone survey.

Result, from 27% in May, the unfavorable opinion score rose to 60% eight months later for the President of the Republic.

And in December, support weakened with headlines such as *“Capitulation”* for Marianne (week of December 14, 2012) or *“Disavowal”* for Le Nouvel Observateur (week of December 13).

Final crack (?): two days before the end of the year, the Constitutional Council struck down the 75% tax rate on annual income of more than one million euros, a symbolic and major announcement in François Hollande’s campaign, in the name of equal taxation in France. The same principle that put an end to the system that exonerated death duties for buildings located in Corsica (a tax advantage over two centuries old) and the tax credit linked to investments in the French overseas departments and territories.

Alternations and alternatives

In response to the tactical game of commitment / no commitment being played by brands and the Authorities in general, consumer-citizens may be tempted to opt for other relational modes.

With the appearance and diffusion of the Internet, we started out talking about disloyalty to traditional behaviors, as if each need corresponded to a natural form of access that was more or less institutional: La Poste for mail, SNCF or Air France for transportation, supermarkets for agribusiness.

The fact that the customer wasn’t using the classic channel was perceived, explained even, as a sort of occasional disturbance in the order of things, but his return to reason, loyalty, proved inevitable.

Next, we saw other, deeper changes, like the choices between buying and renting, keeping or reselling, investing or letting go. They too were relativized, as if eBay, yard sales, parallel channels were epiphenomena.

These alternatives have often been treated as anecdotes...

Now they are realities, as shown by the study conducted on “alternative” consumption practices⁶⁷:

- 80% think that *“bartering practices between private individuals correspond to a real need for lasting mutual aid and social connection.”*
- 71% rejected the idea that these practices correspond to a *“fashion phenomenon that won’t last.”*
- 64% thought that these practices are not reserved *“just for people on low incomes,”* and 58% that they don’t just concern a *“minority of bobos, environmentalists, radicals or young people.”*

One might have thought that far more than 54% of French people would have agreed with *“these practices develop in a crisis period and disappear as soon as the economic context is more favorable,”* meaning that they wouldn’t last.

The most affluent citizens aren’t out of the picture when the question of alternatives is mentioned in concrete terms:

⁶⁷ *“Alternative consumptions,” an omnibus phone study. Ipsos, July 26 2012, 1,012 individuals aged 15 years and over.*

- 54% of high incomes (5,400 euros and over) have already used carpooling, given that 39% of French people have resorted to it, which places this “alternative” in first position.
- In second position, exchanging vegetables, plants, seeds, tools... between individuals (29%), an activity concerning 43% of inhabitants of rural environments, 38% of 60-year-olds.
- And in third position, grouped purchases made by 29%.

Among the initiatives not practiced but that people would like to engage in, 55% quoted the use of their morning jog to provide a service (deliver a paper, do some shopping for an elderly person) and 48% quoted the new practice of trading services between inhabitants of the same neighborhood or town.

Not tested, but interesting, “lamachineduvoisin.com” for passing your washing machine on to your neighbor, “supermarmite.com” for buying a meal ready-made by someone else (1 euro per portion), “kisskissbankbank.com” for financing projects using private loans... Advantages: local service, reliable results, parallel incomes, and tax-free.

A result that confirms that the alternatives are becoming alternations, 70% consider that this type of practice constitutes *“an exciting alternative to the traditional system,”* a red alert which all market players must start taking into account as quickly as possible...

The alternatives accompany a desire for choice and renewal. For pragmatic answers and adjustments to the desire / access channel dialectic that is permanently mutating, as things become simpler and the alternatives more varied, echoing the Internet which has greatly increased the number of rural Cooperatives, with their loyalty points, and which is open to all types of network and exchange.

They show people’s desire to experiment for themselves, to test before renewing or not, a rejection of being advised what to do; between reading the review and going to the movie themselves, the choice is not hard.

But they are tending to show a fracture between those who have the intellectual, cultural and technical means to compare and will take the risk of trying (the wealthiest and most urban people) and those who remain loyal to the traditional channels, theoretically the most disadvantaged and fragile, the inhabitants of rural areas.

Gag: the alternative is becoming a currency-free alternation (recover, rehabilitate, transform) for the wealthiest people, an exception for the least culturally well-off who are captives of traditional channels such as supermarkets...

Consequence 1: competition that is changing the very modes of competition. The enemy of a train company isn’t an airline, and the enemy of an airline isn’t another airline, but rather an individual who carools, and likewise the enemy of a major news publication can turn out to be a simple tweeter. A shift is taking place, as Batman found out⁶⁸.

Brands will need to hyper-adapt, they will need multiple contact points, presence in all types of channel with exclusive segments (services, status, brand image, innovation) and an accumulation of alternatives, in order to capture the client.

A strategy that is close to the definition of the alternating current, *“a periodic electric current that changes direction twice per period and which transports alternatively equal quantities of electricity in one direction and*

⁶⁸ <http://www.telerama.fr/cinema/batman-une-fiction-qui-reflete-des-peurs-bien-reelles,84867.php>

then the other,” whereas the old systems are much closer to the direct current, *“independent of time or period and in which the continuous component is of vital importance”*⁶⁹

Consequence 2: a social utopia, based on a sharing of resources, willing contributions, secure transactions, benevolent relations, a bond between people and generations, encounters and exchanges, lasting communities of interest, a sort of Facebook in the real world.

We can see it at work in consumption and the life of households, living freely together in a place comprising multiple individualities, with shared sequences (soccer game, video game, TV news) and personal diffractions (PC tablet, Smartphone), in an alternating flow in which each person can consume his own box.

Thus, mass marketing is dead, people are weary of exclusiveness, they wonder about its usefulness and effectiveness; in the medical field, we’re increasingly seeing a search for opportunistic combinations of traditional medicine and treatments, so-called alternative forms of medicine, physical and mental care, and none of these can replace the others definitively because the result is supposedly born of this alchemical ideal.

The idea of combining solutions, finding compromises, is also developing in the energy field; after the radical solutions of the “all” nuclear or the nuclear “out,” we have a distribution of resources between thermal, wind, sun and hydraulic, perhaps a single alternative is not conceivable.

It can be verified in the success of hybrid vehicles, although the fully electric car has not yet found its market, despite the recent premiums favoring these cars as part of the productive French recovery following the announcement of PSA’s redundancy plan. In reality, they are manufactured in Japan by Mitsubishi Motors and sold in Europe by Peugeot under the name iOn and by Citroën as the C-Zero.

Consequence 3: the economic crisis reactivated two criticisms born in the 1950s: is the consumer society the final stage of human civilization? Are culture and traditions a leisure activity, a piece of folklore, just one product among others?

Among the answers, *the purple economy*⁷⁰, whose plan is to reconcile corporate world, local cultures and sustainable development: *“culture is an ecosystem hypersensitive to human action, and it records all the impacts.”* Unesco’s world heritage already counts 930 creations, from terraced rice fields in the Philippines to manufacturing batik in Indonesia.

But the technological universe isn’t being left out, *“because this abundance of activity can affect delicate balances that create cultural wealth: unity and diversity, material and immaterial, heritage and creation, avant-garde and general public. It’s time to invent a virtuous link between these two fundamental activities, culture and economy, one that can’t be reduced to mere instrumentalization of the former and vain stigmatization of the latter.”*

⁶⁹ http://fr.wikipedia.org/wiki/Courant_alternatif

⁷⁰ Title of the Manifesto published in May 2011 in *Le Monde.fr* by the Association Diversum, which organized the first International Purple Economy Forum in Paris in October 2011, under the patronage of UNESCO, the European Parliament and the European Commission.

INTERVIEW

Yannick Carriou, Ipsos MediaCT Worldwide

From global village to fragmented village

The acronym NICT, very much in vogue in the 2000s, seems so dated today! Even for anyone who can still remember that it stood for New Information and Communications Technologies at the time.

The world of today's technologies is in fact a rather bad fit with the word "new," which marked perception of a radical transformation. Novelty implies that there has been an observed and structuring break away from the previous situation, a break that is fairly tangible, in any case able to cause astonishment, contemplation and – why not – admiration at its result. The arrival of the very first squeaky modems that gave households Internet access was one novelty. The mobile phone was another, just as cable TV or the microwave may have been in the past. But in their current, constantly proliferating state, the technologies come to us more as a permanent, cumulative flow, one that is expected and sometimes over-the-top in the modifications it makes to product usage at any given moment. The impression of an uninterrupted current disqualifies the sense of Novelty, since the technology of the moment is nothing more than a transitory and unstable state, pending the next innovation which comes along as a logical follow-up, anticipated and inevitable, to what the present one is offering.

It's almost as though Novelty has no more time to be observed, and even less to be admired. We already suspect there will be an iPhone 6, an iPad 4 or 5, a TV with even higher definition, a 4G or 5G Internet, more powerful computers, an even greater abundance of videos on demand...

Today we're in a technological universe without asymptote. But in the NICT, the problem today mainly lies in the IC of Information and Communication. Those two terms take us back to an old speech on the expected benefits of technology. In his Hourtin speech in 1997, Lionel Jospin, Prime Minister at the time, declared: "The boom in new information and communications networks offers social, cultural and, definitively, political promises. The transformation of our relationship with space and time brought by the information networks allows for multiple democratic hopes, whether it concerns access to knowledge and culture, urban planning or citizen participation in local life." In other words, the speed with which information is diffused over the Internet would enable everyone to know and understand what is happening at the other end of the world and to act as an enlightened citizen. The railroads had opened up the valleys of the Vosges, the Internet would open up whole countries and continents. The information highways, another outdated metaphor, would abolish distances and fill the oceans, making the citizen better informed, and closer to any event, any place, any person. The Global Village theory was thus being born right in front of our eyes.

But where are we really with all that? The future being sketched out today by the technologies is more that of a Fragmented Village, particular and specific to each one of us, like a little plot of land that we cultivate our own way and with no consideration of the neighboring lot. In other words, the exact opposite of the Global Village. At least three phenomena are contributing to this. The technology we thought was an open window onto the world opens, above all, via the social networks, onto a narrow village square, where we find our friends, our family, our "chosen ones." Frequented by almost 80% of websurfers in France and a major Internet pastime, the social networks are primarily a means of communication between friends, so between people who are socially, family-wise, friend-wise and professionally, similar. From the same genes to the same interests, the operation and success of these networks are singularly based on a principle of similar identity. The social network is a virtual, limited village that you can carry around with you.

The Internet industry, and particularly Web-based advertising, is also organizing and equipping itself on the basis of a mirror paradigm and village-style endogamy, rather than openness. The principle is a very simple one: it's always commercially less adventurous to solicit people in relation to what they like than in relation to what they perhaps might like.

This is the principle of advertising "retargeting" notably. A given individual leaves behind him a significant digital trace, made up of his behavior on the web, of his purchases, his admitted or stated interests. This trace will help determine what will be suggested to him via advertising, promotions or purchase offers. But it will always be based on a principle of proximity, identity and repetition. He who drank will drink more, he who loves German cars will love them again, he who has visited Martinique will love Guadeloupe. Citizens and consumers are thus duplicated into calculated avatars, which send back reflections and solicitations, reaffirm them in what they are, what they have and what they already do.

The trading Internet, in its final and statistical phase (this is also a part of what we call Big Data), is based on the principle of self-inertia, which remains identical, unchanging and strictly categorized. Not on the culture of the divergent angle, the radical break, clashing with averages. Hence, the algorithms that suggest books or films on specialized websites take your previous purchases into account, and also what people "like you," who bought "the same CD as you," bought. Commercial endogamy. Effective. Comfortable. Flattering even, sometimes, for the consumer who feels known and valued.

But reproduction of motives is associated with the symbolic limits of the village, not with broad, expanded thinking. The fragmentation of the media, which incidentally will soon be enriched with its own "retargeting" approaches (advertising and content will be delivered to an individual based on what he has already done), is also contributing to the fragmentation of the village. The decline of the major general media, from the big TV channels to the leading national press publications, is also the consequence of an increased offering, free or paid, in which each person can seek out what he likes, and to a large extent what resembles him. Village- and identity-based endogamy is being cultivated, whereas the high mass of oligopolistic channels used to incite sharing with a broader world.

By developing not a cult of personality, but rather a culture of ad libitum, ingenious repetition of the individual personality and tastes, the modern technologies used in the media divide and maintain these categories as much as possible. That's where their value lies, their effectiveness, along with the enjoyment individuals procure from being recognized for what they are particularly, and not as belonging simply to a community too big for them to relate to. Each person has his or her own plot of land, opinion, leisure activity, tastes and desires. That's the fragmented village. This phenomenon is a global one, as are the technologies now. But this trend has probably represented a more radical break for French society than it often has been elsewhere. The feeling of belonging to a determined group, to a community, is already very much present in American culture, for example. In countries with rapid and recent growth, such as China, the pleasure of accessing personalized, targeted offers must probably be extreme since it marks a total break with the recent history of forced uniformity...

But in France, that village temptation is probably a strategy of withdrawal and compensation. For what the French are progressively mourning is the sense of their universalism. The Enlightenment, the Revolution, the Universal Declaration of Human Rights, republican education, Resistance, social welfare, Ariane and the TGV are no longer really enough to convince the French of their nation's special role in the world, in the face of political, economic, technical disillusion and their feelings about the crisis. Between Nation (or Europe) and individual, building a new reference, neither completely uniquely oneself nor completely universal, projecting into this virtual village which resembles us and which cultivates its resemblance to us, can be a viable, livable solution. The NICT, Numerous Identity Celebrating Technologies, may contribute to that.

Consequences

Values

Opt-out rights

The defiance between public opinion and the authorities is born out of the results crisis, the gap between the promises made and the way French people are perceiving things. Over time, that defiance is setting in and becoming more extreme, and the less the results are produced, the more public opinion becomes skeptical and critical.

This was the first outline for explaining the basic attitude of consumer citizens.

Because generations X, Y, Z have followed, online access has increased the gap between discourse and usage, with the multiplication of information, comparisons, opinions, likes or dislikes, etc.

Pragmatism has succeeded projection as part of a common ideal, opportunism has shifted the stakes from the group to the individual level, the network and the chosen group have replaced the feeling of belonging to a broader community.

Now, opinion is moving from defiance to opting out, because the values crisis is extending further by introducing ruptures in meaning, relevance and tempo between the discourse spun by the authorities and the new beliefs.

As concerns the younger generations, “setting an example,” “patriotism,” “effort,” are not exactly their terms; and when it comes to elections, abstention is the real winner.

Rights to indifference

“The Shock Poll©” conducted by Ipsos from November 23 through 25, 2012, among a representative sample of French people aged 15 and over reveals some decisive basic attitudes.

While 92% claim to be *“happy to live in France,”* only 53% would recommend going there to live to foreign friends⁷¹.

41% of 25/34 year-olds say they have *“seriously thought about leaving France,”* for another European country mainly (41%, with the UK and Switzerland at the top of the list), North America (preferably Canada with 24%), and lastly Asia (18%).

NB, the motivations to leave are linked more to a rejection of the *“French mindset”* (57%⁷²) than to “professional reasons” (51%), with “purchasing power” in third place with 36%.

37% consider that the motto Liberty, Equality, Fraternity “doesn’t mean anything any more⁷³,” 5% that it has “never meant anything,” while 57% consider that it *“carries values they believe in.”*

⁷¹ NB: 1 out of 2 French people aged 25 to 34, 46% of 35/44 year-olds and 45% of 35/44 year-olds would not recommend to foreign friends that they come and live in France.

⁷² 15-24 year-olds and 60+ years agree on this point with a score of 62%.

⁷³ 55% of white-collar workers, 54% of manual workers, 1 out of 2 artisans-retailers-company heads

27% of 15/24 year-olds and 24% of French people without a diploma claim not to “feel concerned by the future of France.”

As if by chance, one of the articles that finished the year with a maximum of shares and reactions was entitled *“and what if people were leaving France because it’s become a detestable country”*⁷⁴, a subject that Ipsos has been attentive to.

Longing for emotions

At the start of many TV news programs or in the media, we often hear and read *“despite the crisis.”* Next come figures on consumption, saving, leisure activities, spending, with volumes of euros that are indeed surprising.

But *“with the crisis”* is very real for many people, a crisis that didn’t start in 2007/2008, a crisis that has become a living situation requiring adaptations and resourcefulness in order to have the things one wants.

Brands are developing antidotes to establish legitimacy and retain their reference status, to present themselves as a surface for projection compatible with expectations, with attitudes, with new behaviors and above with the emotional states of public opinion.

⁷⁴ <http://blog.davidabiker.fr/et-si-on-quittait-la-france-parce-que-cest-devenu-un-pays-detestable/>

INTERVIEW

Valerie Anne Paglia, Ipsos UU, Ipsos qualitative department

What has struck you in your encounters with French consumers in 2012?

The hundreds of groups, communities and auto-ethnographic reports that we conducted all year round are a remarkable observatory of the ambient emotional state of French consumers.

What's been striking in 2012 is the prominent talk about purchasing power: when mothers tell you that by the 25th of the month they're becoming stressed because they're afraid they won't be able to feed their family right, when going to a restaurant becomes a – very – exceptional outing for many people because the price of a meal for 5 is equivalent to the food budget for a week, it's clear that the question of price is a core factor in everyday concerns.

You can sense that this stress comes with a more muffled concern about the future: will we have the means to give our children all the chances of success? How we will finance and organize ourselves for a comfortable retirement? For how long will France be able to offer prospects for the future to the younger generations within a context in which the country is losing its industrial jewels and where... "it's all happening in Asia"?

These are existential questions that we weren't hearing 10 years ago

Listening to you, it sounds like there's a lot of anxiety out there. But is this period of uncertainty generating any positive effects despite all this?

Fortunately yes! This period is encouraging a sense of autonomy, or even a certain creativity in the way people consume. Consumers have never been so agile and clever in using strategies to optimize their purchases and get around high prices: they buy at low cost from stores selling products with an upcoming sell-by date, they opt for second-hand, which is booming on the web, to get the smartphone of their dreams. Anything goes when it comes to obtaining the desired product at the lowest price.

Inevitably, this gain in autonomy is encouraging greater cynicism with regard to brands, and consumers rationalize fairly perspicaciously over brands' initiatives: if Free smashes its prices, it's so it can "take the market"; when the supermarket "next door" has a special offer on a "case of filet mignon," it's because it "needs to shift its stock!" They don't see any real generosity in the actions of brands, in the sense of helping people out in a tough economic context; and they don't really complain about it either, because this is a period in which there are far more bargain effects than in the past.

What signs of optimism can you glimpse in consumers' motivations at the end of 2012?

I see some positive trends around three axes: extra soul, the amusement of the senses, informal interpersonal relations.

The first basic trend revolves around a form of moralization of consumption. Buy, yes, but if possible put some meaning into it. The return to favor of the Made-in-France is a perfect illustration of that little extra "soul" that consumers are looking for today. It's not so much the guarantee of French origin that they're seeking ultimately (that's so fuzzy anyway, between design and assembly) as the message of solidarity that this choice brings with it (I'm helping to protect jobs in France).

Same thing for the movement against programmed obsolescence: the feeling has started to develop that brands design products “made not to last,” with components programmed to break down after 2 years. People have internalized the notion that getting out of this absurd system is only going to come from them. Consumers recently told me in a group that they would give a real confidence premium to the brand that would commit to making electronics for the general public with a ten-year warranty. The myth of the 20-year washing machine is not far off!

The second lever for the consumer in 2012 is maximizing enjoyment of the experience. In this case, the senses are talking; whether it's about the place, physical products, edible products. This isn't a new phenomenon, but its resistance is striking and its creativity just as gratifying. Food industry innovations offer abundant examples of products that amuse the senses through the hybridization of ingredients that are sensorially very different (Kiri pumpkin soup, chocolate with sea salt...). Same thing for cosmetics where products are infused with extremely powerful imagery through the mention of a single ingredient: shower gel with ginger, Crème Fraîche... These are products that continue to provide well-being within a context perceived as aggressive.

The third strong motivational axis revolves around the need for Relations; in the sense of focusing back on the intimate sphere with a certain simplicity of the moment.

The aggressiveness of urban life, the high price of outside leisure pursuits is favoring the return of the Home for example, in a dimension that is both very informal and warm. A mother was telling us the other day that “no more going out! What I really love is a dish of pasta with friends at home.” Cocktail parties organized on the fly and leaving free rein to creativity without “loading the pressure on” are also emblematic occasions for this return to simple things, to laid-back and regenerating relations between individuals.

In other words, 2012 clearly finished on a very mixed note, because the crisis has been hitting households in a very real and concrete way. But behind the ambient moroseness, the consumer still has desires, which probably have more transformational potential for the future than they did in the past.

Anonymous consultants

Clothing coach or makeover expert: activities that have developed over the past few years as a service, usually high-end. Now there's something new. With the consultant now assimilated with a commercially-motivated salesperson, clients are looking to other forms of help with making choices.

With **cam dressing**, they take photographs of themselves trying on a given outfit in the fitting room, send the image to a network, tweet it, etc. and accept the recommendations of perfect strangers who they apparently trust, because these people have no personal interest in the transaction and because their opinion will be spontaneous and honest.

Instantaneousness, sharing, disinvolvement: the conditions for successful exchange.

Optimization (1)

For a long time, it was thought that "technologies" plus "human" equaled dehumanization, as if time spent on virtual digital occupations (Second Life, online games, chats, networks, etc.) was less human than time spent with the family, with friends, at the table, at a night club...

Today, this opposition is as anachronistic as the adjective "new" in front of technologies. Their obviousness and their intuitiveness are so great that now⁷⁵:

- 64% of French people own a nomadic device, laptop, mobile phone, tablet (+11% from 2011 to 2012),
- 16 million people have a smartphone, i.e. one out of three people,
- 77% visit a social network daily,
- 57% of websurfers talk more on a social network than in real life,
- One French websurfer is on average a member of 2.8 social networks,
- 78% of French websurfers communicate on the social networks, blogs, chats, forums, etc.

More than 40% of French websurfers are on Facebook, which now counts more than one billion active members.

⁷⁵ <http://www.lesnumeriques.com/france-amoureuse-smartphones-tablettes-n27347.html>.

INTERVIEW

Michelle Pollier, Raphaël Berger, Ipsos MediaCT

In 2012, can we talk in terms of progress, from the point of view of the “new technologies”?

Raphaël Berger: The year 2012 clearly appears to be a year of transition and not a year of major breakthroughs in terms of technological innovation. On the French market, we’re observing a consolidation of trends already observed rather than the appearance of weak signals announcing new behaviors.

Since Apple didn’t invent anything this year – or for that matter, nothing since the iPad – we can observe the progression of the tablet: 16% of households were said to own one as of autumn 2012 and the holiday festivities would accelerate their spread. We are between two phases of breakaway innovation: the one we’ve already seen of smartphone / tablet, and the probable one that should take place in the television world, with the new channels to come, from YouTube, DailyMotion or Google, or possibly in the field of connected objects.

To come back to the tablet, it’s an excellent entry point for acquiring a more in-depth understanding of the notion of progress that seems to be being outlined.

Why do you think the tablet is so interesting to observe?

Raphaël Berger: The tablet, even more than the smartphone, features three important characteristics: it’s pointless, it’s simple and it’s developing multi-screen practices, “multitasking.” In the end, it appears to be the symbol of a convivial society. First of all, it’s pointless because it doesn’t, at first glance, answer a clearly identified need in households already broadly equipped with Internet access (78% according to Arcep). But once you’ve tried it, you can’t do without it; like the personal computer twenty years ago, it’s up to the user to invent his own types of usage.

Eventually it should become indispensable because it’s simple. Even more than the smartphone, due to its wide screen, it embodies that simplicity that progress can no longer go without. Today progress is all about access, the object immediately available, with no waiting, no effort to make in order to understand it. The tablet is not approached intellectually, via an instructions book or rational steps – like switching on a PC in MS/DOS in the 1980s – but emotionally. That’s why a three-year-old can use it, obeying his instinct and not his rational understanding of the world, an understanding he doesn’t yet have.

Finally, and this is its most interesting point, it is becoming the second screen in the household, after the television.

Michelle Pollier: The screen – and the increasing number of screens in the household – has for many years been the basis for utopian visions of our society; Jules Verne for example started his “day of an American journalist in 2890” with a videoconference session (referred to as a “téléphote” at the time). With the tablet, the screen can no longer be summed up as image – as was the case with the TV – but it mixes image and text. While the television stood in opposition to the written word, the tablet is a synthesis of the two.

For almost forty years, the television was the central element in households, the tablet should become its best competitor and complement. Consequence: what we call multi-tasking will be able to develop, in other words, watching TV while surfing the Internet at the same time – on your tablet mainly, or on your smartphone. It

wasn't until the tablet came along that we saw this phenomenon develop. 49% of individuals owning a computer, a smartphone and a tablet use their tablet while watching TV.

In terms of progress, it is now possible to spend more than 100% of accumulated time in front of a screen due to the multi-screen phenomenon. This is progress for advertisers, for content producers, who will be able to create new convergent programs, between television and websites, social networks, etc. But that also means an increasingly tough fight to occupy that leisure and attention time.

Has the tablet been reduced to this role as mere additional screen?

Michelle Pollier: The tablet is more than that. For at least fifteen years, or even more, we've presented our future everyday life in the form of households equipped with screens everywhere, the refrigerator that orders milk by itself when it runs out, the heating that can be remotely adjusted, etc. Home automation is our latest utopia. With the tablet, we're starting to turn that utopia into a reality.

Doesn't progress seem to you to be developing greater conviviality between the members of our society? Do the new technologies encourage these exchanges?

Raphaël Berger: We tend to understand the notion of conviviality as the fact of being together and spending a pleasant moment – it's the "taste for meetings and festivities." But we need to understand the word conviviality in the sense of Ivan Illich⁷⁶: "convivial is the society in which man controls the tool."

Is that really the case? Precisely due to its simple use, the tablet dominates man, and not the reverse. It's becoming the necessary interface for all sorts of activity, reading, listening to music, communicating, working. It doesn't build a convivial society, where man frees himself from the tool, on the contrary. Why have a tool for reading a magazine – the main use of tablets – or reading a book, when you can access this content directly? Why this intermediation, why streaming sites for listening to music when it's possible to put a CD in the CD player?

Unlike television, the tablet isn't just a window onto the world, to take the usual cliché, it's a window onto my world, my everyday digital world: my music, my photos, my friends (via the social networks). Television was a medium enabling us to access the exterior, while the tablet is turned towards the interior. It's a screen within our own existences.

*In this respect, it's a very relative form of progress. If we're pessimistic, the vision of humanity presented in *Wall-e*, the excellent Pixar film, is somewhat chilly: in the earth colony in exile in its spaceship, the humans are obese, move around in levitating armchair-type devices and only communicate via interposed screens, via webcam. It's in this respect that it seems to me to be the symbol of a falsely convivial society.*

⁷⁶ Illich, *La Convivialité*, Paris, Le Seuil, 1973.

Optimization (2)

The convergence of human factor and technologies has been established with the rise to power of the social media, which have altered the ways we acquire information and purchase; the society of widespread connection creates alongside it a growing desire for an actual human relationship.

One doesn't make up for the other, since each one corresponds to services of a different nature: automatic payment by geolocation frees up time wasted waiting in line, time transposable to more pleasant online (network, game, reading...) or offline (exhibition, drink after work...) activity.

The journey initiated with the digital world continues into the real world, or the opposite: an example: the **flashmob** organized by Cauet (NRJ radio station) so people could dance with Korean star Psy, which attracted 20,000 people to the Trocadéro on November 5th, 2012, the very same people who had downloaded the international hit "Gangnam style" from the Internet.

These are available, interactive spaces for experiencing something and sharing emotions; brands must answer the call to optimization, like Starbucks⁷⁷ with the products offered in its boutiques, and which consults its clients on a permanent basis via the social networks.

Starbucks cultivates the art of being present at every moment in the offline or online journey, as demonstrated by its first place in terms of Facebook "Likes" and "Followers" on the key social networks (Twitter, Google+ and Pinterest).⁷⁸

⁷⁷ <http://www.myboox.fr/actualite/japon-starbucks-lance-sa-librairie-ac-18427.html>

⁷⁸ <http://visual.ly/restaurant-social-media-top-10>

INTERVIEW

Thomas Tougard, Ipsos OTX France

How can the human factor be integrated into the technologies? At what moment is technology intrusive or useful? At what moment is this human aspect welcome or is it a waste of time?

Whether it's in the Internet revolution, the boom in social media or the boom in smartphones, but also the generalization of ATMs and other automatic payment systems, the growing place of technology in our lives has brought a reaction in terms of a need to reinvest the human element. As shown in 2012 by the Trend Observer⁷⁹, there are an increasing number of signs revealing the growing need to re-humanize our lifestyles and consumption modes.

"Are you aware of spending less and less time together?" 73% of French websurfers questioned by Ipsos thought so in 2010. The figure was 60% in 2006. At the same time, applications and functionalities in terms of new information and communications technologies have developed considerably. It's estimated that this year there will be as much access to the Internet via a mobile terminal as from a PC! Even if the new technologies can only explain one part of the acceleration in lifestyles, it is these new lifestyles that are generating a form of nostalgia for interpersonal relations.

However, this expressed need for "re-humanization" should not be interpreted as a desire for "de-technologization." Players in the new technologies, whether they are manufacturers, application developers or mobile phone operators, should on the contrary integrate this human factor into their innovation and communications strategy, from a positive angle of value creation. That's what pioneer brand Microsoft had specifically tried to do with the launch of the communications campaign for the Windows Phone 7⁸⁰, with Microsoft ironizing on our addiction to technology, by launching: "It's time for a phone to save our phones"⁸¹

The e-commerce world for its part is experimenting with a return to "physical" reality. Pure-players such as Pixmania, C-Discount, eBay or Promovacances have developed their own network of stores and agencies where shoppers can go directly, even if the order will ultimately still be made over the Internet. Unimaginable a few years back! The retail outlet is thus being set up as a reference display case and a living space. In contrast, all the big names in traditional distribution are accentuating the dematerialization of their networks and brochures. The two trends now co-exist, like McDonalds which is testing out order systems via mobile phone, converging with the traditional system in the restaurant. The GoMcDo service is being tested in over 40 restaurants, and means you can order in one click to save time⁸². Meanwhile, the brand is taking a close look at developing table service in its restaurants.

Is this the development of a hybrid distribution mode to facilitate customers' lives?

It's clear that the consumer-shopper is looking for practicality, time-saving and a holistic knowledge of the best offers at the best price, which is greatly facilitated by digital technology. The acceleration of life styles, associated with pressure in relation to purchasing power, is giving rise to individual strategies nourished by digital innovation, and vice versa. But the need for human contact has never been as strong. This aspiration to the H factor is also the source of the regain in interest in locally-based distribution over the past 2-3 years.

⁷⁹ www.ipsos.fr/node/63107

⁸⁰ www.windowsphone.com/fr-fr

⁸¹ www.youtube.com/watch?v=NC2GS8g-PeA

⁸² www.mcdonalds.fr/applications-mobiles

So innovations in the distribution field are going strong, and showing proof of creativity in terms of offering shoppers the best compromise. The development of the drive-in is a successful example of this. And more than just an effective marketing action, Tesco's virtual store initiative, which allows you to shop using your smartphone, based on posters featuring shelves of products on the walls of Seoul subway platforms, is also revealing. You're saving time on time, so you can spend more with friends and family.

Consequence: the line between physical store and virtual store is wearing away.

Is this search for the right balance between technology and human factor a global thing?

Just as it's frequently said that the Internet has no borders, the need for, and beyond that the need to preserve, human contact, is universal. But it's in the balance between the growing need for techno-everything and keeping a form of traditionalism that citizens across the world are expressing things differently.

We measured these differences in aspiration, via three questions that were asked by Ipsos OTX to 18,680 web surfers in 24 countries⁸³.

The first question asked focused on the recent development of automated checkouts in the retail world. "For your store purchases, would you rather deal with an actual person or go through a self-checkout?" 70% of international web surfers claimed they would rather stay in contact with a physical operator, expressing their need for human proximity. Differences do come to light all the same, even if none of the countries gave a majority of votes to the automated system. The demand for a fully automated interface is greater in Argentina (40%), China (39%) or Japan (39%). Only 23% in France, with the lowest number in Belgium (19%). It's nevertheless true that on a global scale, 3 out of 10 consumers prefer an automated experience provided that the system is effective.

The second question is linked to the strong progression of e-commerce and the emergence of m-commerce: "do you like to make your purchases in the store, or on the Internet, or via a mobile phone?" The majority of consumers (56%) across the world still prefer traditional distribution. However here again, gaps can be seen according to country. We can see a strong attraction to e-commerce or m-commerce in the Asia zone. In India, South Korea and China, a majority of consumers claim to prefer buying via the virtual mode. In fact 36% in South Korea and 29% in India claimed to prefer to buy via their smartphone. The trend is reversed in France where 66% prefer traditional distribution networks. 29% would rather opt for the web however, which would suggest that there is still great potential for the new modes of commerce.

Finally, the third and last question echoes the explosion of the social networks: "do you spend more time socializing on the Internet than in the real world?" While the answers are still revealing in terms of the need for contact with the real world, we noted different aspirations between the regions of the world.

The citizens of BRIC seem to be most enthusiastic about Internet-based socializing. 31% of web surfers in China claim to spend more time socializing on the social networks. The figure is 27% in India. In France, it's only 15% (30% among generation Y). The country where the "real" mode is still massively favored is Italy (8%). While, beyond these sometimes large gaps, a majority of the world's web surfers still claim to spend more time socializing via the traditional methods, it's hard to imagine a drop in the craze for the new virtual Eldorado, especially on reading the findings among the new generations. So much so that when you become a web surfer in

⁸³ Germany, South Africa, Saudi Arabia, Argentina, Australia, Belgium, Brazil, Canada, China, South Korea, Spain, France, UK, Hungary, India, Indonesia, Italy, Japan, Mexico, Poland, Russia, Sweden, Turkey, USA.

Indonesia, Brazil or Russia, you immediately don the garb of web socializer. These countries do in fact enjoy the highest levels of web socializers among online populations. The visible counter-reaction in the developed countries, via the need for re-humanization of everyday relations, is in an initial warning, or rather a clear message sent to brands and distributors.

Going Solo

Life as a “singleton” is progressing.

In 1950, 22% of adult Americans were single and 4 million of them lived alone. Sixty years later, 50% are single and 31 million live alone.

In *“Going Solo, The Extraordinary Rise and Surprising Appeal of Living Alone,”* Eric Klinenberg addresses this new dynamic in which solitude is not a matter of isolation but a matter of choice, notably young graduates, divorced people, widows or people who have never wanted to live as part of a couple.

In big cities, singletons can represent one third of inhabitants, or even half of households. It’s easy to imagine the consequences that can have on the real estate and health markets: an insufficient offer and increased needs for individual services with the aging of the population⁸⁴.

Likewise, this raises the question of the advertising business’ capacity to be in step with lifestyles for which “forming a family” is no longer the model.

For actions

Spotlight on expertise

The economic connotations and negative evocations of globalization are dangerous: so companies need to lean on their corporate, human and social dimension, practical experience, a history and a know-how.

Returning to the core of the profession, enhancing the expertise of the individual man or woman, sanctuarizing origins and the long existence of the business, those are three possible strategies as Michel-Edouard Leclerc clearly understood, defining himself as a grocer or the heir to Poilâne, proud of being a baker.

Speak your native tongue

“Das Auto” (VW), “Wir leben autos” (Opel), “Cuore Sportivo” (Alfa Romeo), “Vorsprung durch Technik” (Audi), “Life’s good” (LG). In sharp contrast to the project for a universal language that led to the creation of Esperanto and the global use of English, more than ever the national language embodies the roots of a culture, the condition for authenticity and credibility, an archetype of constancy and security.

⁸⁴ Japan is the forerunner with assistance technologies such as exoskeletons.

INTERVIEW

Marie-Odile Duflo, Ipsos ASI

Since the mid-2000s, Volkswagen has proclaimed itself to be the absolute reference, signing its TV commercials and print ads with a laconic “Das Auto,” The Car, the Auto par excellence, the absolute reference. It’s true that since the launch of the legendary Beetle, the German brand has experienced one success after another, notably with the Passat, Polo and of course the Golf. Admittedly, the brand has lost some of its humor (the days when it’s French ads announced “But it’s so easy not to get it wrong,” seem distant. Ah, sweet nostalgia!), but it has gained in quality and safety: today, Volkswagen means serious.

Same story with Audi. A few months ago, the 4-ring brand abandoned its “Progress through technology” claim for an un-pronounceable “Vorsprung durch Technik,” the German translation of its English slogan. A need on the manufacturer’s part to harmonize its communications on a worldwide level even as far as its slogan, but also and above all a desire to affirm the reliability, rigor and safety of its cars in its native language.

For Opel, it’s a different problem. Remember first of all that Opel has belonged to US carmaker General Motors since... 1929! But that wasn’t so much the issue. Opel has never been a brand with a “high-end” stamp like BMW, Audi or Volkswagen. By signing its advertising since 2010 with the words “Wir leben Autos” (We love cars), Opel is also laying claim to and appropriating that renowned German quality. But unlike Audi and Volkswagen, it does so with a touch of humor, with its three characters as blond as they are handsome, melting the hearts of their stammering French female customers.

We can also recall the launch of the Opel Meriva whose dialogues were entirely in German and sub-titles in French. A film which Renault responded to with a film parodying it, building on the same scenario with an actor vaunting the merits of the Mégane car in a mixture of German and French ending with a hilarious “Ich bin eine Berline,” (“berline” being the French term for a sedan car).

IKEA and its now famous rallying cry “Njut,” meaning “make the most, create, change.” With one simple four-letter word, the brand with its blue and yellow colors (colors of the Swedish flag, by the way) managed the feat of proclaiming its Swedish origin along with its new mindset and life philosophy. A fine example of creativity and advertising impact, combining for maximum effectiveness (Grand Prix in the Ipsos 2012 awards).

Make them laugh

What more effective way to get around criticism, comparison, thinking than to say nothing concrete and specific?

Confining the consumer to the most rational axes of his interpretation grid is a major risk: wackiness, humor, irony, the absurd, special effects, pastiche, anything goes if it means creating a sense of closeness through comedy.

The soft drink brands, Orange, Fanta, Schweppes, 7Up, etc. are experts in this, and have been joined by Contrex, IKEA, Citroën C3, PMU...

Rebuild authority

In order to rebuild authority you have to meet several criteria, notably: personal conviction, a firm tone, usefulness and efficacy of what is said, integrity, accuracy, and the prospect of actual results.

Fail to correspond to those parameters, and citizens or clients perceive incantation, indecision, a lack of leadership.

The spectacle created during the election of the President of the UMP party in November 2012, with a self-proclaimed candidate, the fact of “forgetting” activists overseas in the vote count, the accusations of stuffed ballot boxes, the party’s assimilation with the mafia by François Fillon, the permanent “live and direct,” with soccer-match-style commentary, would be unthinkable for a company or an advertiser.

Here too, the sanctuary failed to resist the shocks: an election, an announced result, uncontested votes, a recognized winner, that’s the way the protocol should have been. It had already been shaken up in Reims with the election of Martine Aubry over Ségolène Royal and surprised people with the single candidate Harlem Désir for the Parti Socialiste.

But the shocks in November 2012 were more violent, to the point where Olivier Mazerolle exploded in real time on BFM TV: *“It’s time to quit laughing. There’s a major political problem. No one understands anything about this party any more. No one trusts anyone in this party. Let’s stop because we’re fed up with French off-and-on politics. I’m tired of commenting on inanities”*⁸⁵

A few days later, it was the turn of the UMP to split at the National Assembly with the creation of R-UMP⁸⁶ (Rassemblement-UMP), a new group assembled around François Fillon⁸⁷.

The conclusion of the power struggle came on Monday December 17th with the “out of the crisis” agreement providing for a new election for party leadership⁸⁸ at the very latest before the parliamentary session of October 2013 begins, and especially with the Municipal elections ahead in 2014.

⁸⁵ http://www.lepoint.fr/politique/olivier-mazerolle-j-en-ai-marre-de-commenter-des-inepties-22-11-2012-1532314_20.php

⁸⁶ Instantly triggering a series of ironic attacks, given the similarity to the English word “rump.”

⁸⁷ “The Fillonists are already a majority in the Senate” according to Gérard Longuet.

⁸⁸ http://www.lexpress.fr/actualite/politique/ump-cope-fillon-un-accord-oui-mais-quel-accord_1200246.html

After Jean-François Copé was proclaimed winner of the internal vote by the UMP appeals commission, François Fillon tried to get it canceled in court.

Integrate new parameters

- The fact that the elites behave in the same way as the masses: sharing everything, communicating everything, saying everything. For example, who forced Audrey Pulvar to announce via a text message sent to the AFP *“the end of her relationship with Monsieur Arnaud Montebourg, Minister of Productive Recovery”* and her desire to sue *“anyone who violates her private life or the private life of those close to her”*? Who then forced her to explain her decision in Le Point: *“I thought Arnaud would come back”* and *“power changes people”*?

- The end of the demarcation line between backstage, stage and audience in the name of transparency and media coverage. The theatre operates on a principle of collective illusion, brands keep their secret, advertising manufactures myths, whereas in the limelight, other shocks are revealed.

Sciences-Po, one of the sanctuaries of French higher education, hasn't escaped this: after the report published by the general accounting office on November 22, the Minister of Higher Education and Research put out a press release announcing the appointment of a provisional administrator to the head of the school, in other words, no more independence for the Institut d'Etudes Politiques.

Shocks or shocking, as you prefer, the salary⁸⁹ of the former Director, *“the absence of any internal and external checks explaining the weaknesses and irregularities in his management,”* the budgets negotiated at the Prime Minister's office in 2008 then at the Elysée Palace in 2009, *“the granting of raises and bonuses based on discretionary regulations, the exemptions made in lecturers' length of service, with some seeing one hour of lecturing paid double, triple, or even quadruple,”* *“the 3,000 substitutes providing 93% of lectures, but receiving only half of the sum of salaries paid out to around one hundred researcher-professors,”* *“taking out a risky 15 million euro loan without the approval of the Board.”*

Then there was “Mission Lycée,” which cost 836,000 euros without the Board being informed and was carried out using four different communications firms with no bids launched, which is illegal, the various executive apartments, the number of credit cards which went from 37 to 58 between 2005 and 2010, with spending going up from 89,000 to 498,000 euros...

- The impression that the dichotomy between the elites and the French people has reached its peak, between the financial elites (who manage to dodge taxes and penalties unlike the middle classes), cultural and media elites, disconnected from the experience and concerns of the “people,” and which is expressed in the recurrent themes in public opinion (immigration, Islamization, insecurity, welfare handouts).

- The persistence of habits that leave the impression that nothing has changed. Take the letters sent to magistrates by François Hollande and Manuel Valls during the trial of the authors of *“La Frondeuse,”* who were sued by Hollande's partner Valérie Trierweiler for *“defamation and invasion of privacy.”*

Lawyers and media have enjoyed reminding us of the socialist candidate's own words during the debate with Nicolas Sarkozy on May 2, 2012: *“I, as President of the Republic, would have the legal system function independently,”* coming from the man who tried to intervene with his own testimony, denouncing one part of the book as *“pure fantasy”*.

⁸⁹ 44,000 euros a month as opposed to an average of 8,000 euros for a University President

Together, all these parameters have led to a merciless interpretation grid, devoid of enthusiasm and with no respect for the political authorities, promises of detachment and abstention, and which are best summed up by the words “go ahead without me”.

Create

In theory, political alternation doesn't offer many alternatives, especially within a context of “endless crisis,” in the words of Myriam Revault d'Allonnes who calls for everything, except resignation: *“whatever its intensity and toughness, the limiting power of the crisis doesn't mark the end of an inevitable process, it doesn't lock us inside any fatality. Quite the opposite, it demands that we turn back and change the way we look: the endless crisis is an endless task and not an end.”*

That was the basis for the “Disruption” principle, born within the context of a crisis (already or again) in the early... 1990s. Drop in sales, worried clients, dropping purchasing power, loss of confidence in advertising... No Internet or Madoff yet, but all the fundamentals were there to ensure things would go bad and that the “conventions” would no longer work.

In reaction, Jean-Marie Dru developed the creative leap⁹⁰ strategy at ad agency BBDO:

1. Identify all the stereotypes theoretically defining perception of a brand, an institution, a company,
2. Call them into question in order to break through the straightjacket of the *“old stock of ideas that keep things in their current state,”*
3. Imagine a vision that goes beyond functions and values and attributes a far superior and projective dimension to the brand.

Example: if Apple makes computers, it can't position itself as a credible competitor against a group like IBM, but if Apple is a universe in itself, if Apple “thinks different,” then it's not about products any more, but about cultural and symbolic belonging.

Nowadays, the consumer-citizen is creating his own disruption. Having joined in the tactical game of commitment / no commitment played by brands and Authorities in general, in ego-marketing, he's firing back with the technological relational mode best suited to his own narcissism: giving his opinion on everything, all the time and everywhere.

The proof: over 500 billion impressions on products and services are shared online very year.

⁹⁰ “Disruption Live” Global Village

INTERVIEW

Amaury de Baumont, Ipsos Marketing, I&F France

Crisis consumption, limit or a godsend for true innovation?

If 2012 placed the spotlight on the consumer conscience, 2013 will be the year that the individual's power in relation to the "group" is strengthened. Knowing how to consume in "good collective conscience" is doubtless an acquired skill. The success of the future might well lie in the capacity to activate the desire to consume for oneself, without ever doing so to the detriment of others. Is a philosophy of consumption in the process of being born?

A crisis that states its name, an evil for a good?

Immersed in crises for more than ten years, this time the French consumer is sufficiently close to them for the once virtual abyss to become a terrible reality of his everyday life. The individual consumer can no longer deny what is obvious, he will need to adapt.

After watching countries in great difficulty come closer to our frontiers one by one (Greece then Spain then Italy), the crisis becomes even more concrete when it starts affecting your wallet. The various taxes of 2013 will hamper the purchasing power of the French, leading to choices which, while they might have been a precaution in the past, will need to become an assertive stance that will have nothing temporary about it.

Despite everything, with ten years of more or less proven stagnation, the consumer has been preparing his mutation for a long time already. While he will clearly be feeling the crisis in the uncertainty of his purchasing power, he won't stop consuming, but will do so differently, prioritizing the search for pleasure and well-being, the search for authentic sensations, chosen to (re)-enchant his everyday life while keeping his "feet on the ground," aware of the economic reality.

"Just because things are going badly doesn't mean I'm going to stop living or consuming, however I'm going to choose what I really like, even if it means having to go without meaningless things that bring me nothing in the end."

"Thanks" to the crisis, the consumer will take control of his own pleasure, his own well-being. He will become aware of what he really needs in order to be truly happy and shift from the superfluous to the simple.

The home, center of attention!

The home is expanding, rebuilding itself, young people are staying at home, seniors are closer to their children and grandchildren, or are even regularly present in the home and provide financial assistance.

The home is becoming a "micro society" in which each individual will build his own references, seeking out his own life and pleasure codes with a respect for those around him.

Symbol of the re-enchantment of the home, the huge success of TV cooking reality shows demonstrates day after day just how important being happy and making others happy has become. Cooking has even become a subject of psychological study of the individual since it concentrates all the emotions the consumer might experience and serves as a refuge from moroseness.

Always a symbol of that search for the re-enchanted home, positivity is everywhere, including in the sphere of children's education, with "positive discipline," a concept and a book originating in the US and that is experiencing growing success.

Drawing from these symbols, it's more than likely that 2013 will see happiness in the home, a happiness that goes via a return to "recipes," simple values which each person can "rummage through" to find his own authentic happiness.

The marketer at the consumer's bedside...

Industrialists must organize resistance and not choose the wrong fight, envisioning 2013 as the onset of low-cost would doubtless be the worst mistake.

The consumer will be constantly on the lookout for bargains, but he is also becoming aware that his body belongs to him, as does his health, his happiness and that certain pleasures that he deliberately chooses will be worth spending his money on. The products he buys will therefore be simple, reliable and imprinted with authenticity or even vintage nostalgia in some cases.

In order to succeed, the marketer will need to wear a "psych" hat and be more attentive to the consumer than ever, addressing him with great sincerity, without ever lying to him or deceiving him. The arguments presented, the ingredients, the recipes will need to be simple and authentic: the smell of cleanness, a taste for the past, the recipe from my youth, the seasonal product. It will sometimes take courage and intuition on the part of companies to dare to change the codes and practice an exclusive form of marketing focused on the individual, teaching him the art of being happy.

Sincerity and simplicity, the keys to success?

Yes, sincerity will definitely be the key word when it comes to innovating well.

That means that we will need to review consumer feedback to create a clever balance between dream, emotion and being rooted in real life.

Innovation needs to be designed to reach "people" with simplicity. Innovation is already impacting "-free" products (paraben, sugar, aspartame, palm oil, preservatives, colorings, artificial flavorings, salt...) and "reduced" ones (packaging, plastic, overwrap...), echoing the discourse on health and the increasing stakes linked to waste reduction.

Innovating well will mean knowing how to pay special attention to each individual and in particular:

- Seniors, whose role has been reinforced both as a consumer, but also as a family reference. Revisiting authentic things that have already proved their worth is an initial route.

- Young people, who consume a lot by nature and continue to do so. Fitting in with the times and with modern life will be a must.

- Children. Since parents are unable to guarantee an economic future, they will be the guarantors of their children's pleasure and health capital. Tasty products with natural ingredients will have the place of honor.

To make people dream and restore magic to everyday life, diverting or re-appropriating strong codes, symbols of what is beautiful and good, will enable pleasure to be revived where it was no longer expected...

Marketing methods will also need to be simple in the way the consumer perceives them; his need to be kind to his wallet should never be neglected, a clear promotion, simple activation, a truly attractive price (no trap), an ad that will make him feel that his purchase will be “smart.”

Finally, origin should not be neglected, without necessarily opting for the “super local.” An increasing number of conversations are taking place in shopping aisles for all categories (from fish to household electronics), commenting and observing the presence or absence of “Made-in-France” products, a notion that was improbable just a short while ago; today, a consumer may leave without purchasing if everything he finds is “made elsewhere.”

Place your bets!

- 1. 2013 will see the start of a major turning point for industrialists and for their brands, giving them the opportunity to place themselves alongside the consumer to assist him and provide him with the authentic, simple pleasures he is looking for on a day-to-day basis.*
- 2. 2013 will provide an opportunity to not fail in building a new and lasting base of loyal consumers who are sincerely grateful to the brand for being kind in its solutions to help them in their quest for enjoyable consumption in difficult times.*
- 3. 2013 marks the entry into an era of benevolent and unrestrained marketing.*
- 4. The weather in summer 2013 will make things “even easier” for many brands.*

Spice things up

E.L. James' *"Fifty Shades of Grey"*⁹¹ – aka "mommy porn" – sold 50 million copies outside France. Published in France on October 18 with an initial print run of 320,000, it had sold 304,000 copies by early December.

The story and effects are fairly basic compared to the great writers of the past, Sade, Crébillon, Pierre Louÿs, André Pieyre de Mandyargues, Bataille, Pauline Réage...: arts undergraduate and 21-year-old virgin Anastasia dreams of Prince Charming but meets a sadistic billionaire who will make her his slave.

But as an anecdote to boredom, anything becomes possible...

⁹¹ Elected "most important personality in the publishing world in 2012" by *Publishers Weekly* magazine, after the founder of Amazon in 2011 (cf. www.publishersweekly.com).

INTERVIEW

Carole Romano, Ipsos MediaCT

It's always about crisis, with few murmurs... do the French still have a taste for the pleasures in life?

They certainly do! The success of the year goes to the first volume in the erotic trilogy with a sado-masochistic tendency, "Fifty Shades of Grey" by E.L James. A real worldwide phenomenon, there's talk of a "mini baby-boom" in the US, and in the UK one woman asked for a divorce, accusing her husband of being too boring in bed and failing to recreate scenes from the book!

40 million copies have already been sold worldwide, reaching record sales levels in France.

This novel reaches out to a broad audience, mothers, pensioners, single women, girls and many people unaccustomed to entering a bookstore.

Likewise, "Bared to You" by the American Sylvia Day has been on the best-seller list since it came out. The very shocking "Story of O" has been re-published, and manuals written for women wanting to know more about the terms and sexual practices described in the novel are also highlighted on the shelves.

Passion follows reason, so?

Early 2012 was marked by the presidential elections, a period when general literature never does very well. Publishing houses are very careful, tightening their production and keeping the big book launches for the second semester.

Alongside that, there was an increase in VAT on books, and purchasing power fell due to the drop in morale among the French during a time of crisis. A difficult context for the book market in the first semester.

Sales picked up again in September thanks to the launch of several books, and notably the first adult book by Harry Potter author J.K. Rowling, "The Casual Vacancy," and the winner of the Goncourt prize for high school students, "La Vérité sur l'Affaire Harry Québert," by Joël Dicker.

How can a success like that be explained? Why are woman attracted to this type of literature?

Several reasons are behind this success.

First of all, the book grew out of a blog by a Twilight fan, and immediately garnered a very strong reputation on the Web. It then came out as an e-book before being published. The growth of erotic literature started a few years ago with the boom in digital tablets enabling discreet reading. Thereafter, success was self-perpetuating: everyone buys the book through curiosity. The "chic porn" and general public aspect titillates people's minds. So they don't have to feel bad about buying a truly erotic book. Since it's a societal phenomenon, readers are no longer afraid to be pointed at and can take the book out without embarrassment in the subway, bus or other public places.

Next, this book is basically a fairy tale, a handsome rich billionaire who falls in love with a young virgin student. It has echoes of "Pretty Woman" in modern times, with a smattering of texting and emails on Blackberry and

Mac, and a little bottom-spanking thrown in here and there. The erotic, S&M aspect only amplifies the phenomenon.

The incredible media buzz also revolves around the unknown author, E.L James, a 40-something who claims to have done nothing but describe her own fantasies while eating Nutella... stories that Hollywood is crazy about.

Finally, women now have a stronger perception and higher demands when it comes to sexuality. This book is the logical follow-up to the success over recent years of series such as "Sex and the City," or "Desperate Housewives" and the emergence of sex toys ... and women are just simply attracted to porn. Less "trashy" than films, the book is still an effective aphrodisiac for women. This type of reading material means women can give free rein to their imagination, their need for escape, and maybe it helps add some spice to their lives. Literature enables women to "please" themselves the way a man does with a film.

What about other sectors of the book market?

Indulgence is still the predominant theme but this time in the practical sector with several books about Nutella.

A real marketing system has developed around cult brands, in the form of mini-books or cheap objects (3.50 euros). The biggest sales were for "30 recettes cultes de Nutella" (30 cult Nutella recipes) published by Marabout with more than 200,000 copies sold since the start of the year. These recipes cover all types of sweet treat, from the Belgian speculoos cookie to Carambar candies, via Vache Qui Rit cheese, Lu Petit Beurre cookies, Tagada strawberries and Mika chocolate.

One thing's for sure, these addictive and regressive recipes are primarily "reassuring and comforting."

Place your bets!

- 1. Beyond refuge value, women have a greater desire to self-indulge and that's being expressed in their eating habits. According to the 2012 wave of the Observatoire des 4,500, 34% of women are paying less attention to their weight (vs 37% in 2010).*
- 2. Women are allowing themselves to crack without feeling guilty, they even seem to be unembarrassed about cracking. Weight control books can expect some lean days ahead.*
- 3. Indulgence will doubtless be the key word as 2012 comes to a close, to ensure a better experience in 2013! For Christmas, will we be finding handcuffs, or a jar of Nutella under the Christmas tree?*

Value the little things

The ultimate references may be increasingly distant and lofty⁹², but the little sources of happiness back on dry land are still within everyone's reach, echoing what Pierre Sansot wrote in *"Les gens de peu"* (1992): *"People of little, just as there are people of the sea, of the mountains, the plains, gentlemen. They form a race. They possess a gift, the gift of little, like others have the gift of fire, pottery, martial arts, algorithms. Littleness also gives rise to affectionate attention, a desire for benevolence."*

Tender descriptions of July 14th municipal dances, do-it-yourself, camping grounds, domestic quarrels, street soccer, the Tour de France, these are all mythologies⁹³ of the poor man, dare we say, preceding Philippe Delerm's *"La première gorgée de bière et autres plaisirs minuscules"* (1997).

Brands have also understood the added emotional value of the "little amount."

⁹² On Sunday October 14, 2012, Felix Baumgartner became the first man to break the sound barrier without the use of mechanical power at a speed of 1,137 km/h (Mach 1.24), making a parachute jump from a capsule pulled by a helium balloon at an altitude of 39,000 meters.

⁹³ Roland Barthes, *Mythologies*, Seuil, 1957.

INTERVIEW

Sylvie Gassmann, Ipsos UU

How can we do better in France in 2013?

To be stronger than the crisis, in 2012, brand advertising took refuge in the cozy cocoon of everyday life; the lone break is no longer in fashion. To survive this period deprived of everything, the best solution was to reinvest the private sphere. In 2012, in order to do better, you had to be together, that was all. Portrayals of family and friends are thus being over-used in advertising now and it would seem increasingly difficult for brands to emerge using this approach.

Homage to little couples

This was one of the striking trends of advertising in 2012. Couples form and seem to play on their closeness via their brands and their consumption habits. Like the couple visiting a Renault used car dealership regurgitating the sales argument to a dumbfounded saleswoman, or the boyfriend preparing a surprise party for his “Nana” (informal term for “girl” in French and also a feminine protection brand). The Ariel campaign also plays on this “bonding through consumption” notion by portraying the little habits of family life, like the young household comparing each member’s clothing habits. And in terms of total glamour, there’s also the ad by mutual insurance company Corem in which a woman wakes her partner up in the middle of the night to tell him that by preparing their retirement, they can save on taxes.

Little family delights

When the family expands, the tribe organizes to counter the effects of economic pressure together. This generational bonding in relation to the outside world is a real value in families today, as shown by the Ipsos lifestyles observatory (in the 2010 observatory, 89% of parents claimed to be very close to their children). The Castorama campaign is remarkable in this respect, since the family can scoff at the crisis, thanks to the stores’ “system C.” The Banque Postale explains that it can help the family avoid worries, Bouygues Telecom presents a “tribe” very reminiscent of French TV series “Fais pas ci fais ça,” yet likeable all the same, and CIC brings in whole families thanks to its mobile range. There are also the three brothers who meet up again thanks to Milka Crispello, the father who comes to pick his son up from school with a Kinder Surprise and the SFR dad who watches his daughter’s art class from a distance. Even IKEA, which was advising us last year to “Njut” (make the most) brings us a genealogical portrait this year. All these scenes share one notion: consumption brings people together.

Finally, bonding becomes more intense and also darker in the new Société Générale campaign where father and daughter find each other in the kitchen in the middle of the night. She’s coming home late and he can’t sleep because of money problems.

Bonding between friends

When comfort doesn’t come from spouse or family, it comes from friends. And the rituals are transposed to this chosen family. In French society, links with friends are tending to become stronger and brands have grasped that fact. We’re seeing the great return of the Coeur de Lion saga with the band of friends sharing good times and a camembert, but also the two McDonald’s buddies betting on the right recipe, the gang of friends playing Tagada

using Haribo candy, and the others whispering into the Twingo so as not wake the driver's baby... Curiously, portrayals of male friendship seem more inspiring than female friendship.

Fortunately, it's not all little!

It's good to shell garden peas. But it's also good to take off for new horizons. And some brands haven't forgotten that the best way to forget the greyness isn't to show it, but rather to tint it with laughter, tenderness, emotion, escape. So thank you to Contrex for making us laugh, Hermès for making us dream, Oasis for taking us on a voyage to the countries of fruit, Red Bull for going beyond the limits and taking us through the sound barrier, Perrier for cooling the sun, Lancôme for reminding us that Life is Beautiful.

*Of course, Buddha warns us: "It's a rare pearl in this world to have a heart without desire," but as Henri Laborit also put it in his *Éloge de la Fuite*, "You can't be happy if you desire nothing." So, choose your guru.*

Therefore, 1

What is the crisis the name of?

The name given to events that we don't understand, that we no longer understand or that we don't want to understand.

All the logic mechanisms whose linearity once reassured us are jammed. No people and few things are now in the place where the public expects them to be.

A torrent of shocks, one after another, have led to cracks and revealed the emergence of other reference points, other standards, as bothersome as they might be.

Doctors are no longer public figures, the notion of "poor worker" is a paradox that surprises no one, a degree provides no guarantee of a permanent work contract, income no longer means you'll be a homeowner one day, department store Christmas displays are no longer designed for children, etc.

The gap between status markers and resources is widening fast with brands and status-enhancing products operating on shortened cycles, innovation dynamics, and the internationalization of models.

Status symbols differ according to categories. For those who feel most vulnerable, it means going to Leclerc or Carrefour rather than the hard discount store; for those who are more affluent, it equates with continuing to live in central Paris rather than the suburbs.

The split between income and capacity to purchase thus explains the negative feeling with regard to [purchasing power](#); most of those who are "wealthy" from a statistical point of view will be the ones deep in debt in the future: they feel de-classed and weakened given the efforts they must make to stay in the race and access the symbols of integration. They are the most vulnerable in the case of a professional accident, yet the most convinced of their own security.

So it's much more practical for everyone to engage in a great leap backwards in a country without an "Occupy" movement and which believes that the shock absorbers are eternal.

Wagers

Let's place a few bets on the current set of beliefs:

Don't get worked up

43% of French people agree (strongly + somewhat) with *"I live day to day without asking myself any questions."* Not surprisingly, this score goes up to 55% among 15-24-year-olds, but also concerns 52% of 35-44-year-olds, 62% of manual workers, 58% of households with a net income of under 1,200 euros.

Stability

"Feeling good" means "starting a family" for 33% of the French, "Having a job, employment security" for 30%. "Investing in society, politics, non-profits" is shared by only 18%, while 15% consider that it means "satisfying your individual desires, making yourself happy."

One-off alliances

The desire to see hopes for a fraternal society in alternative forms of consumption still exists; but the utopia doesn't count out pragmatism, an association of well-understood interests and permanent adjustments.

The traditional distribution channels need to anticipate the development of grouped online purchasing (obtaining discount prices on bulk buying), with 85% of people on high incomes and 79% of 20-24-year-olds claiming to be "*attracted to this initiative*" (29% were already making grouped purchases in 2012).

Partial loyalties

What are we still loyal to? What are the segments of exclusivity? What commitments can there be when the offer is constantly being renewed...? Brands want a maximum of Likes from their consumers in order to measure their reputation, but the Like isn't an indicator of approval and recognition, no more so than the fact of looking at content on the Internet.

The one billion webservers who saw "*Gangnam style*⁹⁴" by the South Korean Psy were only playing his game: simplicity, mockery, pure entertainment, the global carnival.

⁹⁴ http://www.youtube.com/watch?feature=player_embedded&v=9bZkp7q19f0

The shocks of the future

INTERVIEW

Stéphane Desnault, Ipsos Information Technology

2012. The year the world was supposed to end. To believe the French, taken as a group, it really did end, in the form of decline, or of an imminent economic disaster. The morale of the French nation is at half-mast, and it's hard to find an objective reason why when you compare the situation of our country with that of its close neighbors: the Italians, Spaniards and Greeks have been subjected to a shock far more violent than our own over the past four decades, and they're still more dynamic and more optimistic about their future. The French depression is a special case, our pessimism is a new "exception."

Why can't we manage to project ourselves forward in a more positive way? Why are we afraid of 2013?

The answer is complex and multi-faceted, it includes short- and long-term considerations, perceptions that are inevitably very different from one French person to another. Let's look at three routes here, which have no claim to constitute an exhaustive list.

The first route jeopardizes the Thirty Glorious Years, the founding myth behind our recent prosperity. At the end of the war, France took its future in hand. From 1945 to 1973, the economic fabric was reinvented, we digested several technological revolutions, the French appropriated their own territory: regrouping of lands, nuclear energy, highways, TGV high-speed train, new towns... In all these territory-based technologies, France became a world leader.

The leadership resulting from the "Thirty Glorious" is under attack: the emerging countries are entering into the same virtuous cycle as we experienced, using the same methods, but at a pace accelerated by the technologies; in turn they are doggedly appropriating their own territories and setting themselves up as competitors as well as partners. In five years, China will have more high-speed rail lines than Europe.

Worse, and more fundamentally, the technological revolutions of the 1990s and 2000s want nothing to do with territories and regions. The Internet, knowledge sharing, search engines, advertising and online commerce are breaking through borders. Google, Facebook, Wikipedia are structuring and capturing value on an international scale. The "network effect" is being developed on a scale far bigger than the national territory, which can no longer serve as a "staging ground." Neither France nor Europe seem able to resist or organize against the new international services of the 21st century, to produce giants capable of holding up against Apple or Google.

The United States and Asia have found new growth relays and are leaning firmly on the new global infrastructures. The key is technological innovation, but also the invention of new models that are quick to squeeze out the old ones. Europe is largely absent from this race, busy erecting fiscal dikes to save the old world by taxing the new one. Who wants to invent the new Google in Europe if his only prospect is to keep funding the upkeep of printing works for daily newspapers at a time when tablets are taking over from paper?

The second and third routes are the two sides of questioning of the national plan dating from the Revolution: the Republican model aims to attribute its identity to each citizen. A position that was recently reaffirmed around the debate on secularity, which ended with the deliberate repression of religious expression in the public sphere.

It's a French exception. Our neighbors are amazed to see us legislating on the veil, the outfits that can be worn at school or behind a counter at the post office. They don't have our history, the creation of the French State during the Revolution, based around the notion of the Republic, against the Church, the nobility and regional particularities. Anglo-Saxon democracy, for its part, organizes community living without claiming to unify behaviors and beliefs. In France, any assertion of difference is easily accused of being "communitarianism," and the community in question suspected of wanting to launch an attack on national unity.

So the second route involves an internal questioning, in light of our recent history, of the inner workings of this unified, normalized, difference-free identity. French society is more and more of a melting pot.

Arab and African culture in particular are clearly expressed in literature and popular cinema. Our model of assimilation is giving way to an increasingly visible and pronounced ghettoization, one that has been widely documented by our best economists and sociologists. Entire communities don't find "citizen's rights" – in the true sense of the French term "droit de cité" – within the Republic, and (a new factor) they choose to reject assimilation. Our collective identity and our capacity to project into the future are being muddled as a result.

And lastly the third route, the very pertinence of this identity model is being attacked from the outside. Our new reference space is at least European, or even, as we wrote earlier, global. The French exception is no longer necessarily a goal or a legitimate claim, even if Europe is struggling to establish its cultural identity. The French take refuge in paradoxes: they were passionate about the Obama election, but in most cases would have trouble naming the key European leaders.

2013. Global village. Tension between the temptation of the village and the globalization of information flow. Two examples: Facebook, one billion active contributors, and "Gangnam style," viewed by 1,067,674,752 people. So the exchanges, the likes, the services can be counted in billions. At a time of new revolutions (3D printing from home was featured on the France 2 News program on December 27th), inventions are moving outside the box!

Therefore, 2

INTERVIEW

Dominique Lévy, Ipsos France

Innovation, disorder, progress

Wondering about innovation, about how this concept relates to the concept of progress, is both obvious and a paradox at the same time.

Obvious, this word (“innovation”) that has become so hackneyed (along with its procession of avatars: change, transformation, creation, disruption... to quote but a few) is so central to everyone’s discourse, from the politician to the “marketer”; a paradox because, in the end, we’re asked much more often to question the “how?” of innovation than its “what?” or its “why?” and, therefore, how it relates to that other concept: progress.

However, it’s becoming increasingly clear that these two terms are not confused and that successful innovation is often – exclusively even – the innovation that “makes progress.”

So we won’t be talking about innovation techniques here. What concerns us today is more trying to understand what innovation is and what its purpose is. And more particularly, the way it is (or isn’t) a vector of progress.

What’s the purpose of innovation?

The need for it is so commonly accepted that it seems definitively established. Innovation is an economic reality for any company that wants to develop its business, have an edge over the competition and, by extension, for any society that wants to “forge ahead.”

So it’s a permanent movement that we’re trying to understand. And that issue of movement, its pace, its possible side effects, is occupying a growing place in many debates, whether it’s about consumption, economics or politics.

Politicians and company heads (and, to a certain extent, public opinion) do in fact increasingly think that innovation is the basis and core of everything they do. That propensity to think that the fate of a society depends on its capacity to innovate even tends to turn it into a myth, a belief that energizes and sparks debate. There can be no corporate strategy without an innovation strategy, no political discourse without an exhortation to move away from “one-track thinking,” to change, to adapt to a changing world. In short: something new, something novel, something different!

This incantatory vision of innovation sometimes eclipses its reality: it’s a process that has its meaning, its output, and implies disorder in order to attain progress.

Disorder?

By definition, the transformation of what exists implies understanding it as much as contesting it. “Look at the world, and ask why not?” (Vanessa Paradis), that’s the start of any innovation. Sometimes, it’s also the start of trouble...

According to the criteria used for evaluating the established order (based on sector, corporate culture or just culture), this disruption will be more or less tolerated, more or less encouraged. According to Josef’s Schumpeter’s well-known formula, disorder will thus be a “constructive disorder” or a threat.

According to countries and eras, public opinion is more or less resistant to or enthusiastic about the idea that creating new economic activities means the displacement or even destruction of previous activities.

Likewise, according to sectors, mindsets, consumers will evaluate the innovations presented to them with varying degrees of benevolence, depending on whether they perceive the meaning and relevance of the offer presented to them and whether these justify (or not) the disruption of their habits (paying more, buying elsewhere or in a different way, adopting different rituals...), calling their values into question or even the more collective risks that it entails (environmental harm to quote the most obvious example).

So innovation implies disorder and that’s not acceptable unless it brings real progress with it.

So we still have to define progress. Let’s try.

The notion of economic and technological progress is relatively clear; we can claim to define it as making new products, services, production modes available and measuring the value thus generated. The notion of “progress” is also spontaneously associated with science, technology and is very positively connoted, as shown in the study we conducted in October 2012 on the occasion of the 40th anniversary of women entering the elite educational and research institution, Ecole Polytechnique.

However, that same study also revealed a strong demand for progress of other types: equal opportunities, access to jobs and housing, quality of life, the environment... All things that could generally be grouped together under the term “social progress,” and which proved hard to define during our research, generating more concerns and skepticism.

Sciences, technology and macro-economics on the one hand, well-being and environment on the other; the dialectic is fairly clear: innovation brings disorder in its wake, therefore risks, and only brings progress to the extent that those risks are viewed as necessary but also – and more and more – as mastered and regulated.

What’s more, that’s also what the corporate responsibility concept (increasingly trendy and often rather vague) covers: self-regulation of the disorder created by the development of corporate activity. Working conditions of employees (whether it’s “social breakdown” in France or the exploitation of minors overseas), managing environmental risks, obesity, waste recycling, ... there are countless examples and, more and more, they are being integrated by many manufacturers as... innovation routes!

The new Tann’s school bags or Timberland Earthkeeper shoes are light, solid AND made from recycled materials. The Nutella recipe contains palm oil AND Ferrero has set up an eco-friendly growing program. The new light soft drinks are based on Stevia. Benneton has committed to promoting youth employment (with the “unemployee of

the month” campaign). The shampoos in the new Ever Pure range by L’Oréal Paris present the dual promise of being effective and sulfate- and silicone-free.

We could go on citing examples, but they all convey the same message: innovation today is – also – the promise of progress.

Above all, it’s a recognition of the fact that the consumer has evolved and no longer measures the usefulness (to use the economically correct term) of a product or service based only on how he will actually use it, but evaluates it in an increasingly complete and complex manner. Value for money is still with us, but the notion of quality, which is eminently polysemic, can now integrate (in addition to the “classic” variables of product performance) criteria relating to origin, manufacturing conditions and environmental or health impact. According to the place, the sector, the moment, the client, these “progress” criteria will have varying degrees of influence.

So a process of innovation is not fully complete unless it extends as far as the notion of creation of usefulness, manages to root itself in real life, or even transform that real life. That process can only develop if it brings meaning, in other words if it provides the reasons for innovation, and incorporates control over the disorder it generates.

So we must jointly question the notions of value (What has value? For whom? At what moment?), and of values (What are the moral, political or consumerist criteria put to work in evaluating a product?).

It’s ambitious. But aiming for progress is probably the only way to achieve true innovation.

The good news is that, as Claude Lévi- Strauss once wrote: “The file is never closed. Every time progress is made, it produces a new hope, suspended from the resolution of a new problem.”

Song

Extra-lucid

Don't want my country to become some ugly woman
Not each one in his corner and that's why we go out
You want love? Might as well seek an angle in a circle
There's just people! Why seek an angel in this century?
Ever since I was a kid I've been bored in the street, at school
So many runways, but never any take-offs
That's why I fool around, that's why I decode
This encrypted world that drives you crazy, drives you mad
Look for the signal, hearts in satellite dishes
Get fuzzy reception, because they're man-height
Grew up in the projects, suburban ghetto-gentleman
(They) Had my destiny sketched out, I found the eraser
My soul has firewalls there are too many viruses
My body is Seth and my heart is Horus
A giant's love in cities of small-time losers.

Words & Music: Disiz
Track: Extra-lucid
Album: Extra-lucid ©Def Jam Recordings

No superego, no id

Nicolas Sarkozy wanted to liquidate the superego while taking responsibility for his desires: “I won’t lie, I won’t hide, I won’t apologize,” was his response to journalists about the evening spent at Le Fouquet’s, his stay on a friend’s yacht or the remarks about his “style,” his salary, his divorce, and so on.

François Hollande tried to liquidate the id, in other words impulses, declaring: *“I will be a normal President”* in May 2012.

On the one hand, for Freud, the superego causes a denial of impulses, in other words pathologies; on the other, for Canguilhem, anything that isn’t pathological is normal.

The emergence of narcissistic expression is being accelerated by the Internet, a revolution in our world and in our behaviors. Its first child was comparison; its second is the demise of intimacy, effect of the dual bankruptcy liquidation of superego and id.

So, structure or impulse?

1. Structure can bring happiness through little things; in this respect, advertisers, companies and media would be well advised to limit the fantasy element.
2. Impulse won’t give up any of its pathologies, so the advertising show, luxury, projective surfaces, desires are all “no limits.”

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