Mozilla in Europe - lessons in open source, community & culture

Tristan Nitot & Zbigniew Braniecki

Back to Basics - What is Europe?

- 48 countries - covering 6.8% of the Earth

- 800m people - 11% of the World's population

- 385m people online - 27% of World online pop.

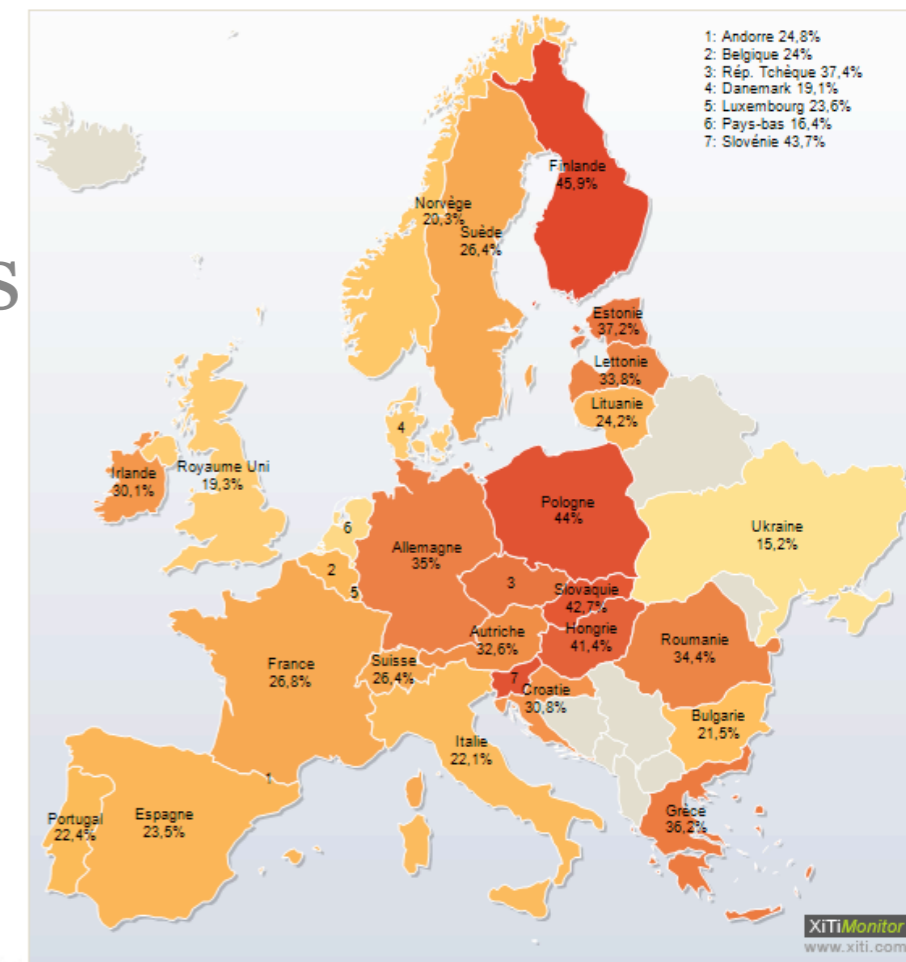- Hundreds of cultures, histories, politics

- 200+ languages

What does that equal?

Diversity!!

Why is that good for Mozilla in Europe?

- 32 language versions of Firefox

- 70% of all Firefox versions are in Europe

- Roughly 24m Active Daily Fx Users

- 3.5m Fx Downloads per week

- Scores of active Mozilla communities

- 3 more languages in the works

1: Andorre 24,8%
2: Belgique 24%
3: Rép. Tchèque 37,4%
4: Danemark 19,1%
5: Luxembourg 23,6%
6: Pays-bas 16,4%
7: Slovénie 43,7%

Finlande 45,9%
Norvège 20,3%
Suède 26,4%
Estonie 37,2%
Lettonie 33,8%
Lituanie 24,2%
Irlande 30,1%
Royaume Uni 19,3%
Pologne 44%
Ukraine 15,2%
Allemagne 35%
Slovaquie 42,7%
Autriche 32,6%
Hongrie 41,4%
Roumanie 34,4%
France 26,8%
Suisse 26,4%
Croatie 30,8%
Bulgarie 21,5%
Italie 22,1%
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XiTiMonitor
www.xiti.com

Proof is out there – Europe's Latest numbers

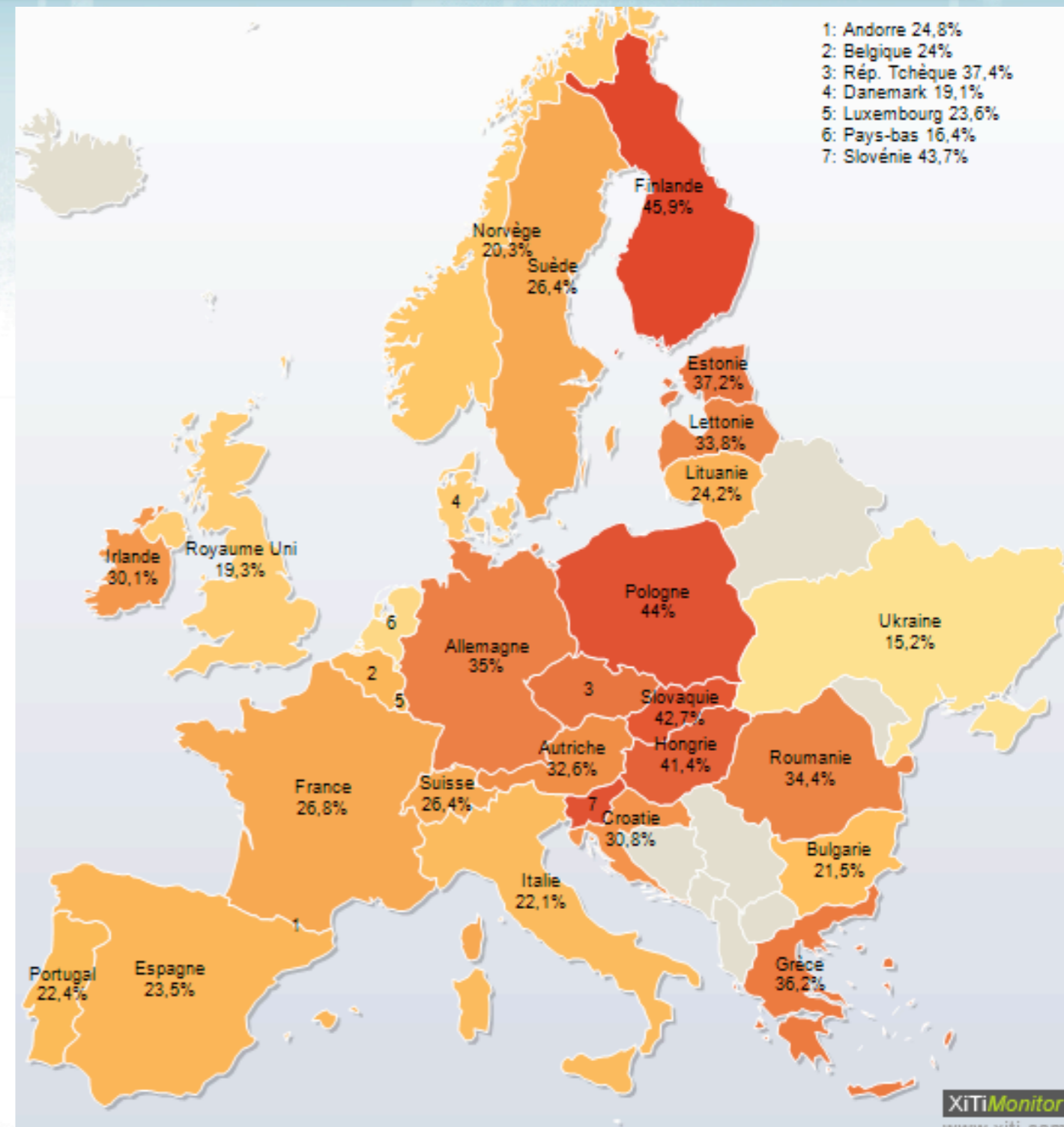According to local companies, Europe's average market share is : ~30%

Snapshot:

Poland: ~ 41%

Finland: ~ 46.9%

Slovenia: ~ 38%

Germany: ~ 35%

France: ~ 26.8%

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European diversity: both a curse and a blessing

- Local communities have significant local impact
- Additional motivation: "We do it for our language/culture"
- Asymmetric advantage: fragmentation slows proprietary software more than us
- Values: Free Software spirit (activism) stronger than in the US
- **BUT** it's hard to efficiently cover so many countries
- Communities are very focused on their independence - responsibility and control over their "region"
- => Everything we do **MUST** be localizable

Local communities address diversity

- Local communities are our eyes, ears and hands in the field

- Product Localization

- Website Localization

- Add-ons Localization

- Local Forums

- PR in local language (in some cases)

- In most cases, ~~Open-Source~~ Free Software activists

Inside Look 1: Mozilla in **France**

- 36 million Internet users

- 12 million Firefox users (4 ADU)

- Several organizations:

  - XULfr.org (XUL dark matter doc, forum & forge)

  - Geckozone.org (forums, Add-ons site in French),

  - FrenchMozilla (product l10n)

  - Issues: Competing with AMO and SUMO, no SFX eq.

Inside Look 2: Mozilla in **Spain**

- 40.5 million citizens, 25 million Internet users
- 10 million Firefox users (3.3 ADU)
- FOUR official languages (Spanish, Basque, Catalan & Galician)
- Several organizations:
  - Mozilla Hispano (News, docs & forums)
  - Nave (product & addons l10n in Spanish)
  - SoftCatala (product l10n in Catalan)
  - Liberatze (product l10n in Basque)
  - Xunta de Galicia (product l10n in Galician,sponsored by local state).
- Interesting initiatives: DifundeFirefox.com, FirefoXtensions

Mozilla in CEE
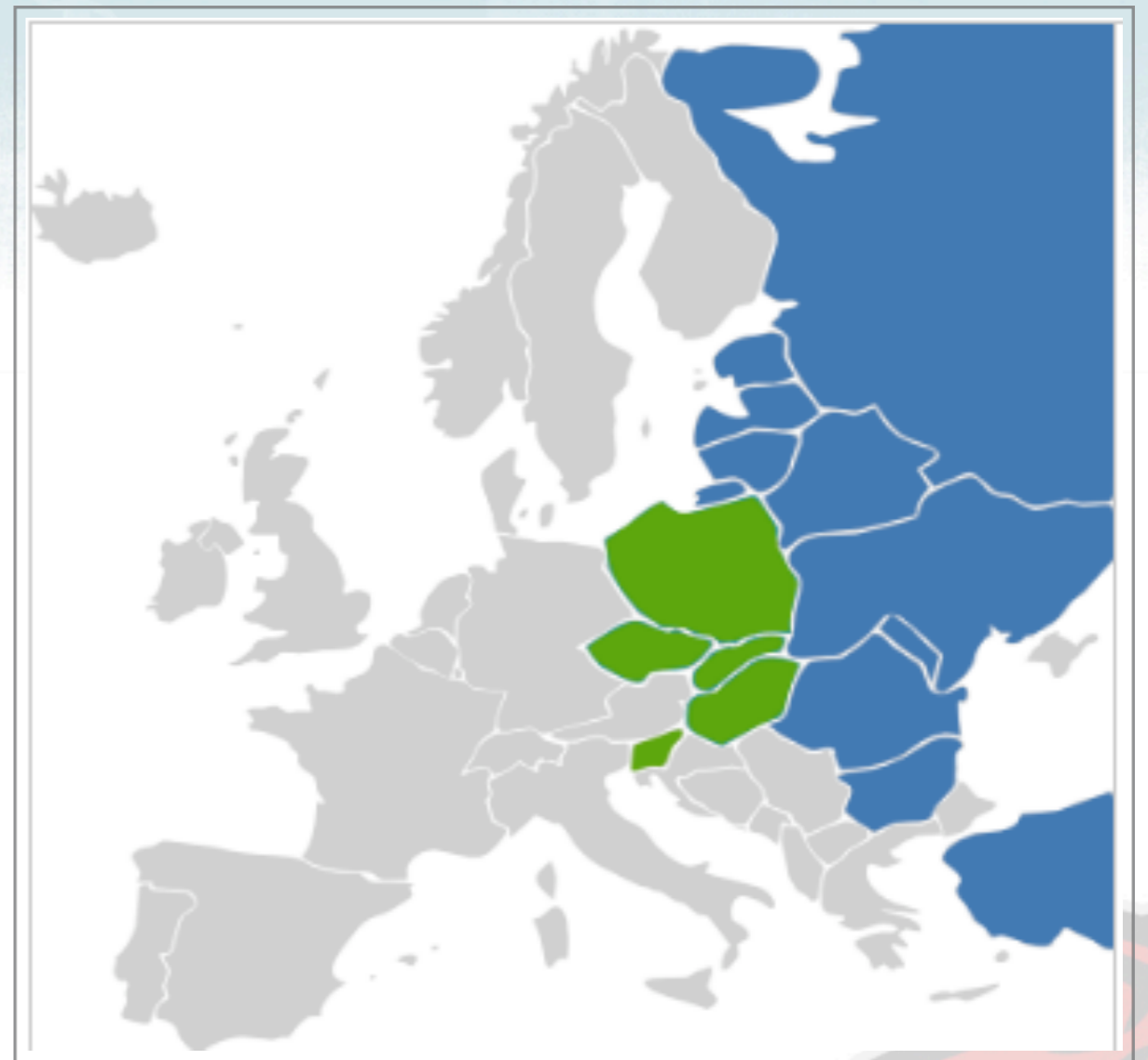
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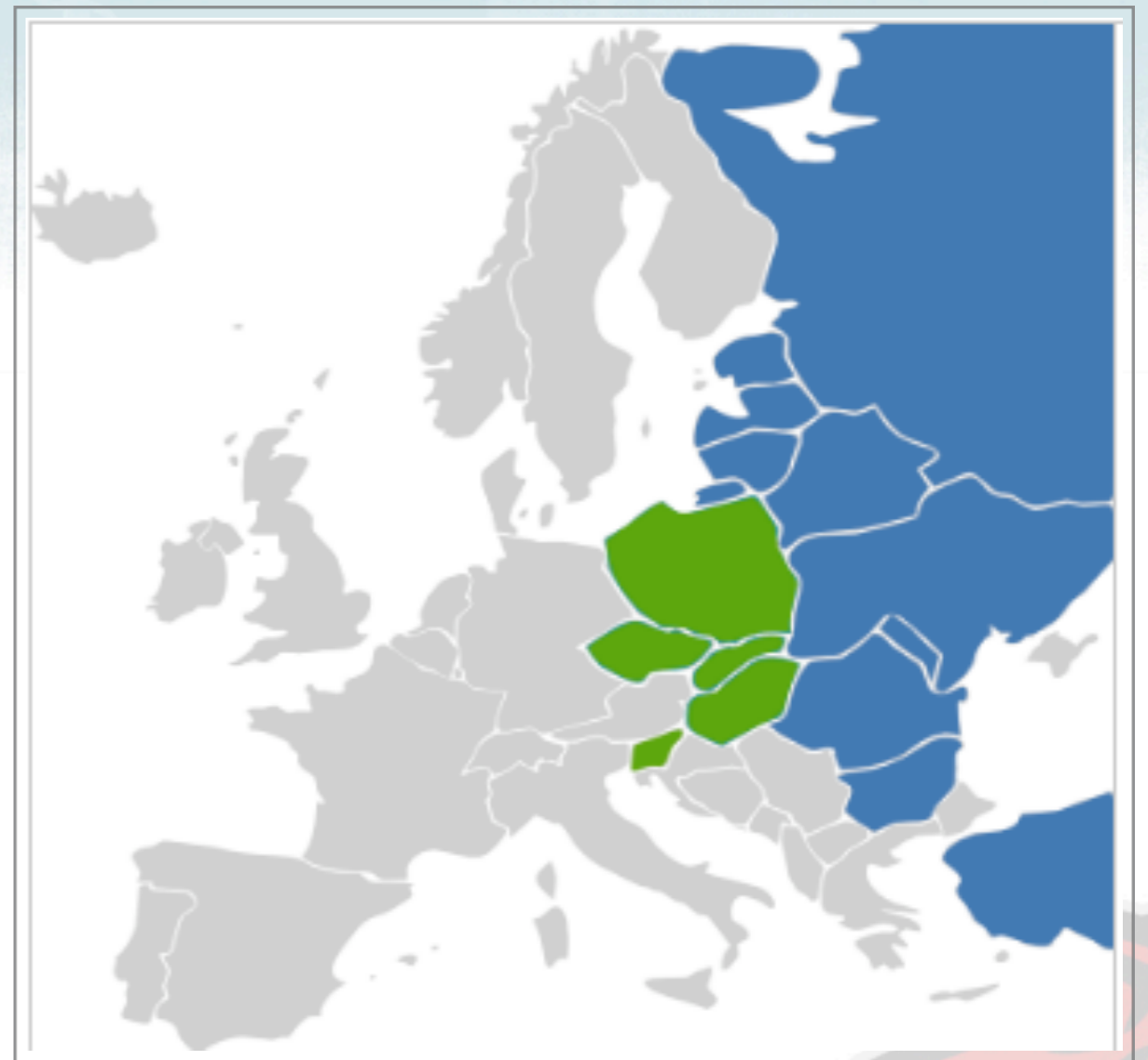- **Many medium and small size countries**
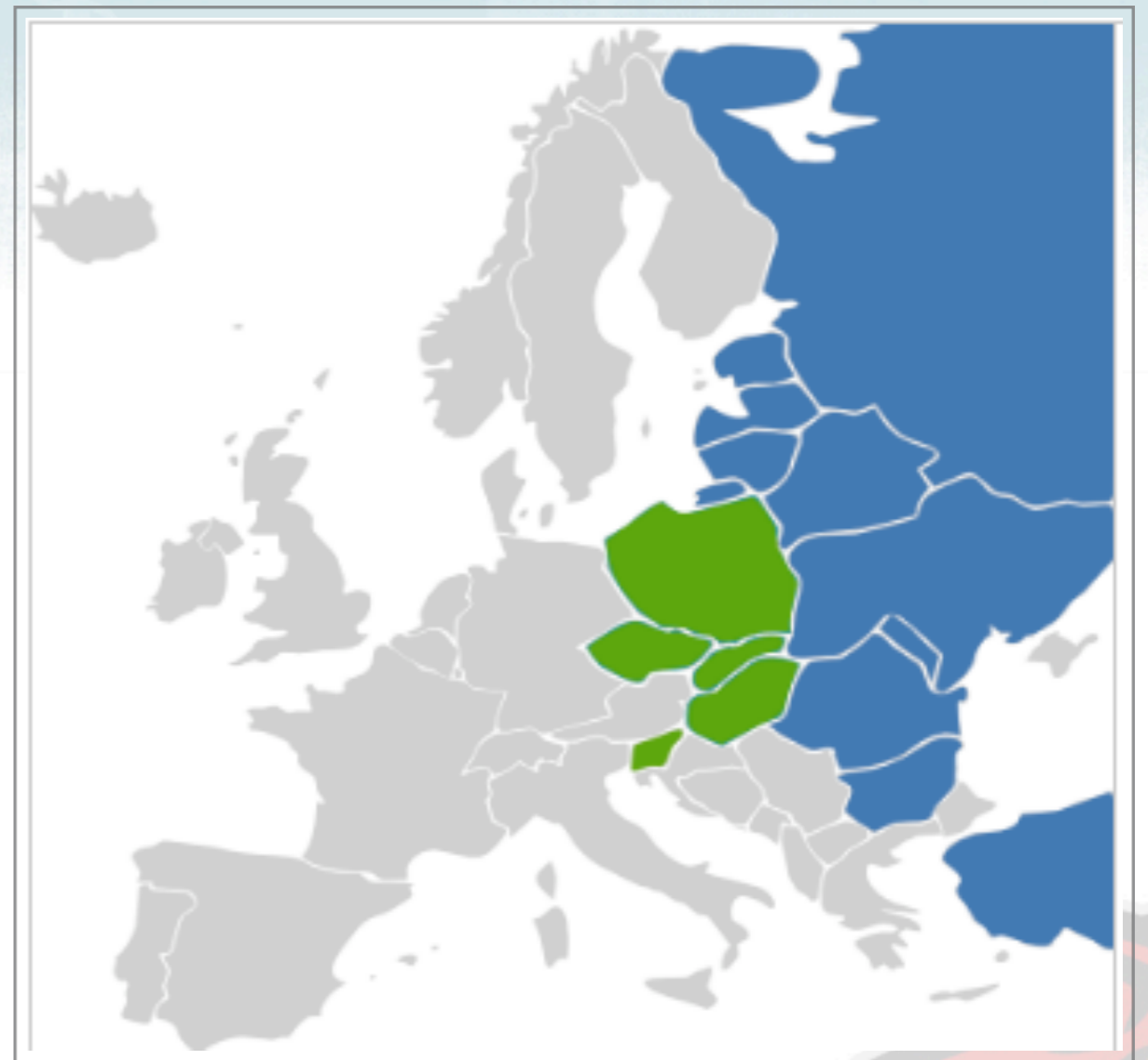
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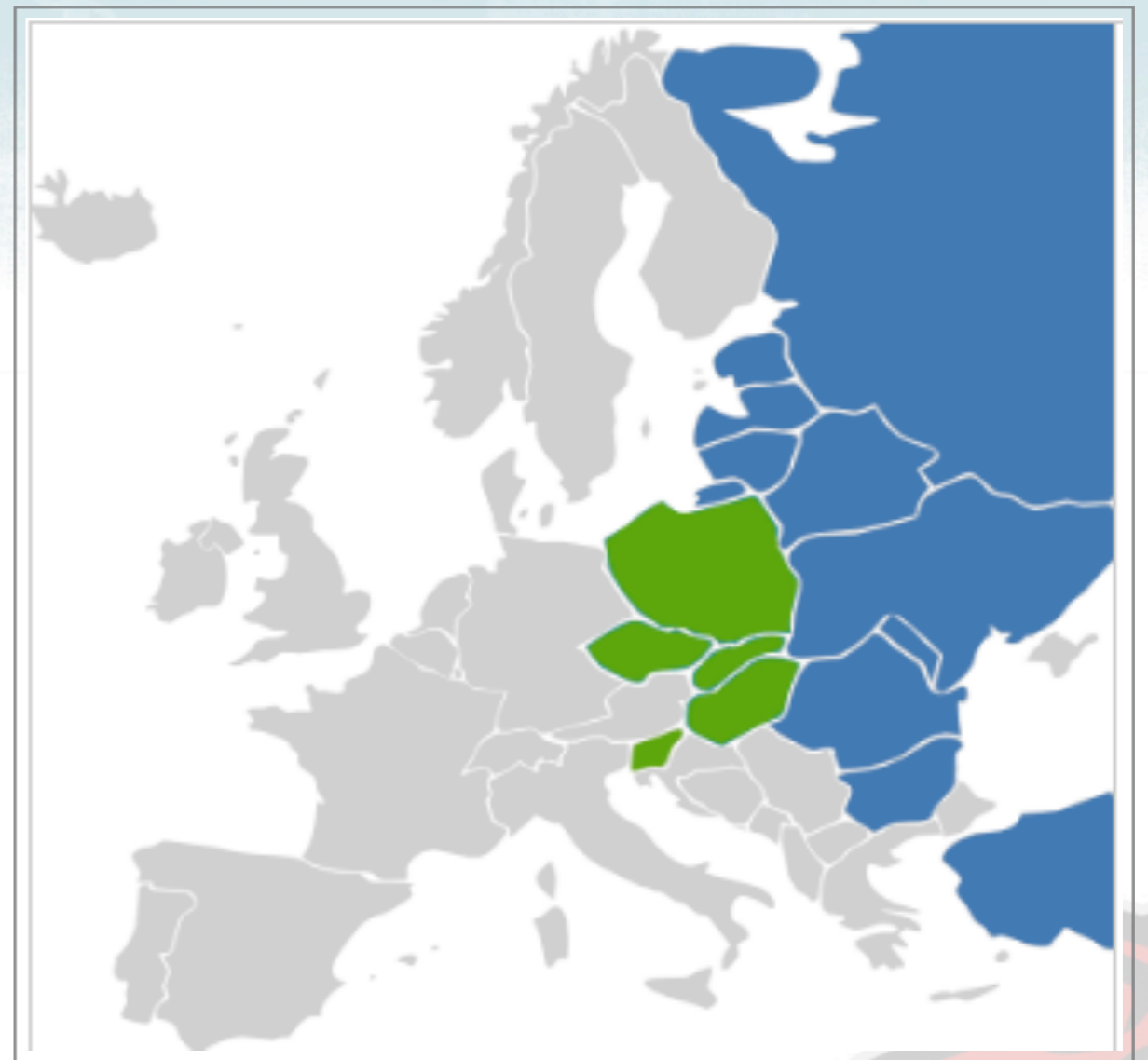- **Each community and market is very independent**
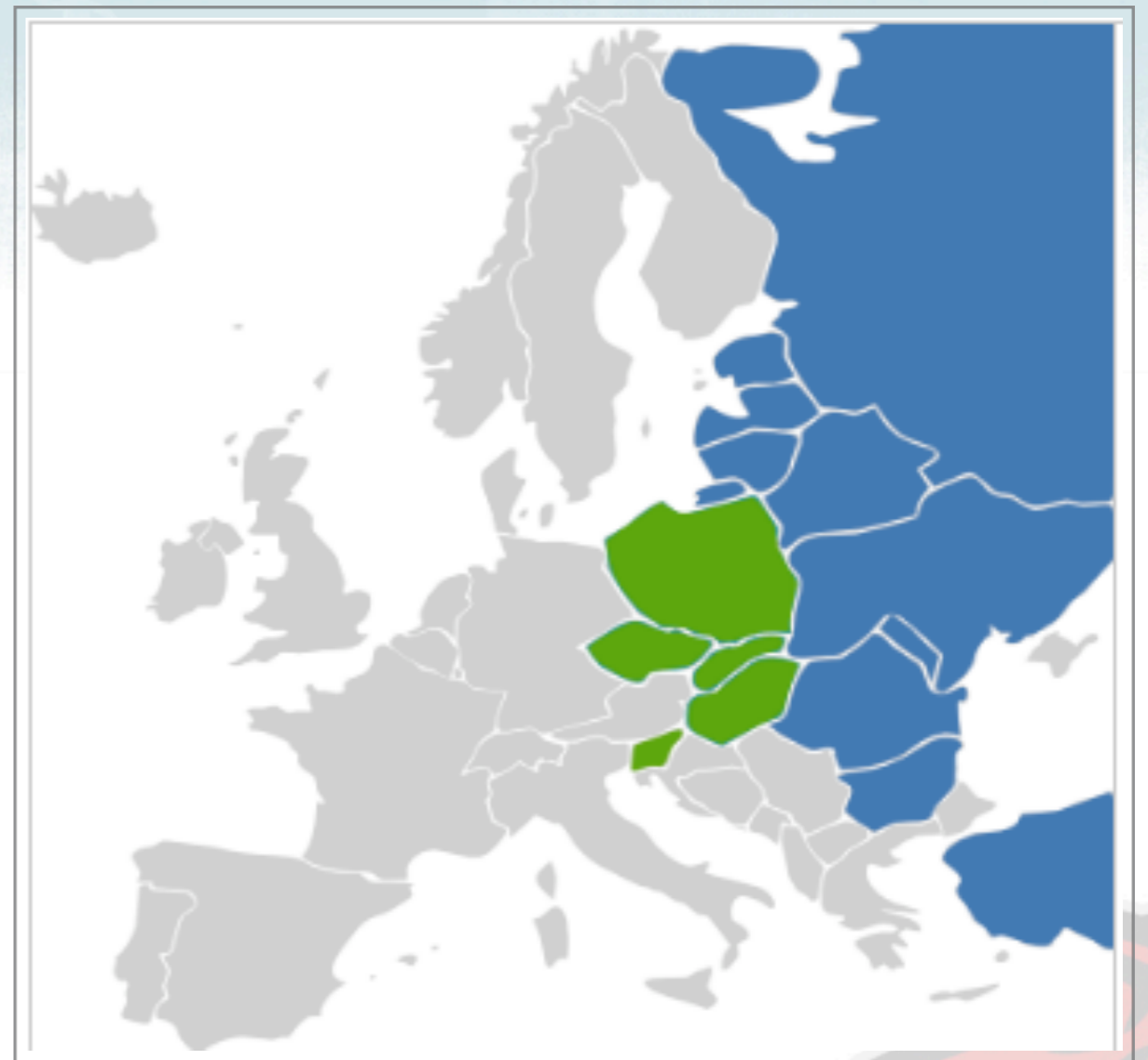
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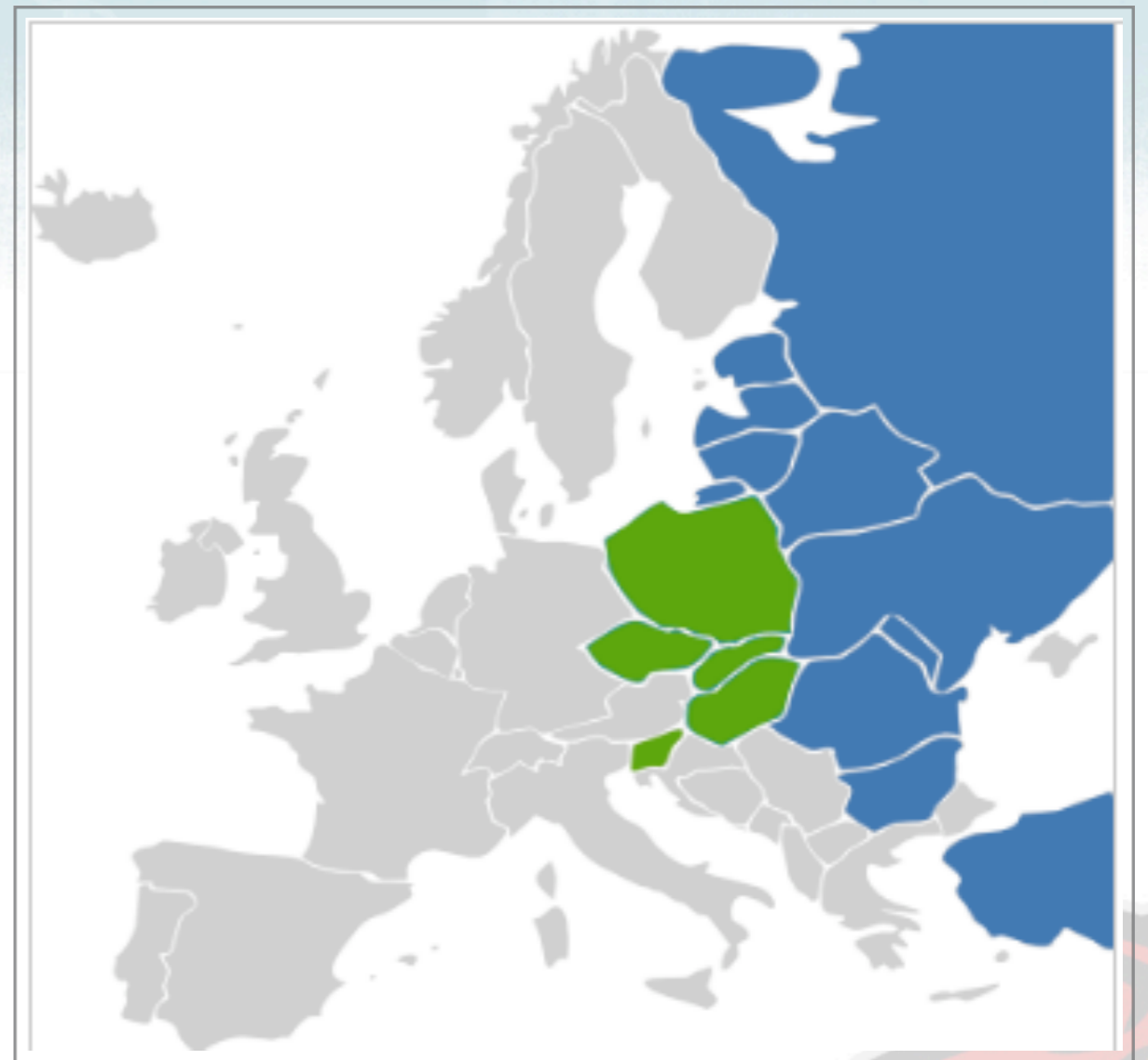- **Local communities in all**

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- **And all of this without any top-down efforts. Pure bottom-up.**
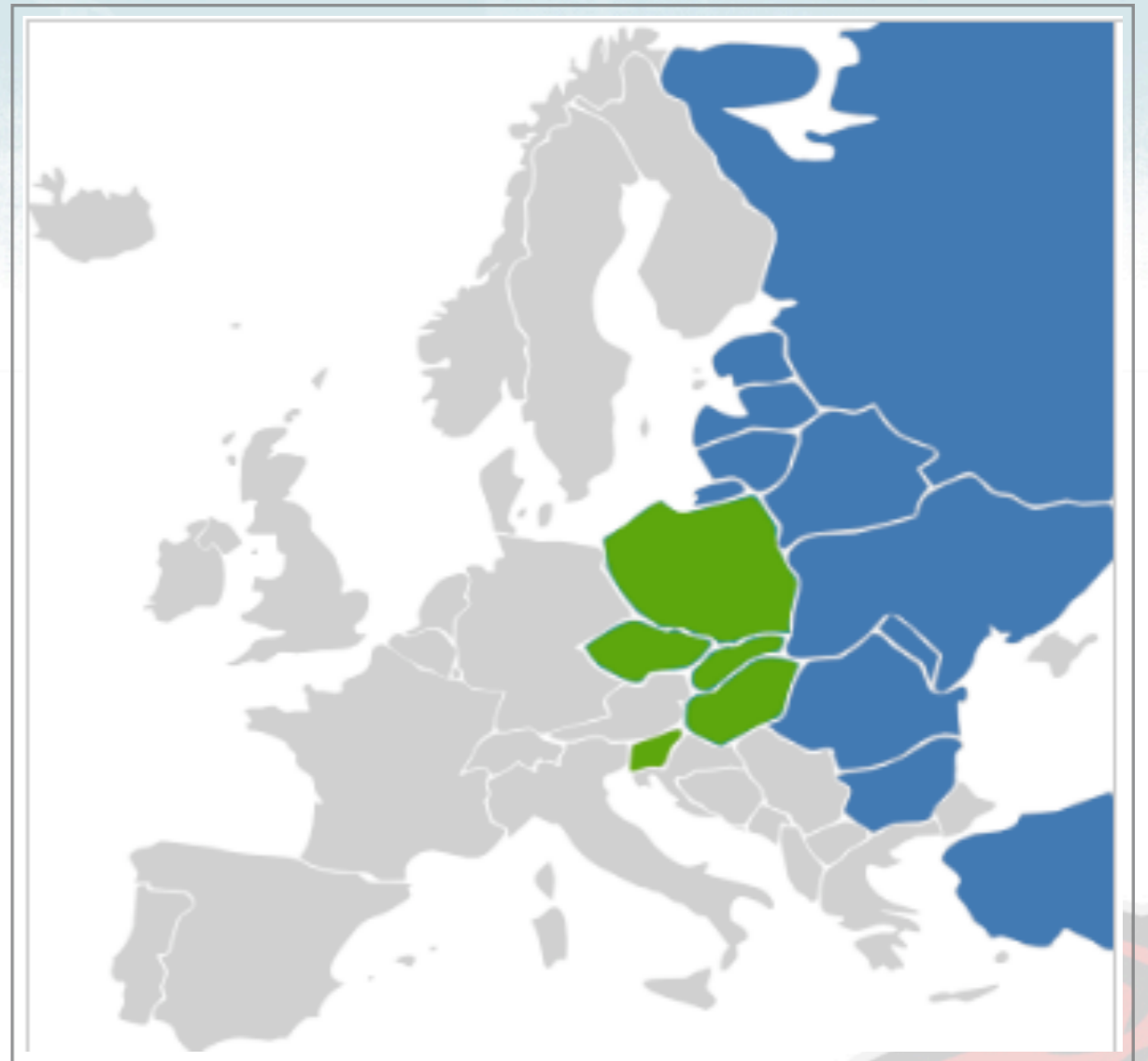
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  - Differences in PR/Journalist attitude

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- Strong Opera market in Russia, Poland Ukraine

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- Eastern Europe is just entering the Internet - Imagine 100 million users who're going to get their first computer during next 3 years.

- CEE has a good record on developing custom technologies before global brands entered:

 - Gadu-Gadu

  - Grono, Nasza-Klasa

  - Yandex, Seznam

CEE: Lesson to take

Part des visites Mozilla Firefox dans les pays européens	Février 2008	Mars 2008	Écart (en points)	Écart (en %)
Finlande	44,8%	45,9%	+1,0	+2%
Pologne	43,5%	44,0%	+0,5	+1%
Slovénie	44,1%	43,7%	-0,4	-1%
Slovaquie	41,8%	42,7%	+0,9	+2%
Hongrie	40,2%	41,4%	+1,2	+3%
Rép. Tchèque	36,8%	37,4%	+0,6	+2%
Estonie	37,8%	37,2%	-0,6	-1%

Out of 7 most successful countries in Europe, 5 are from Central Europe and one is of Eastern Europe

CEE: Lesson to take
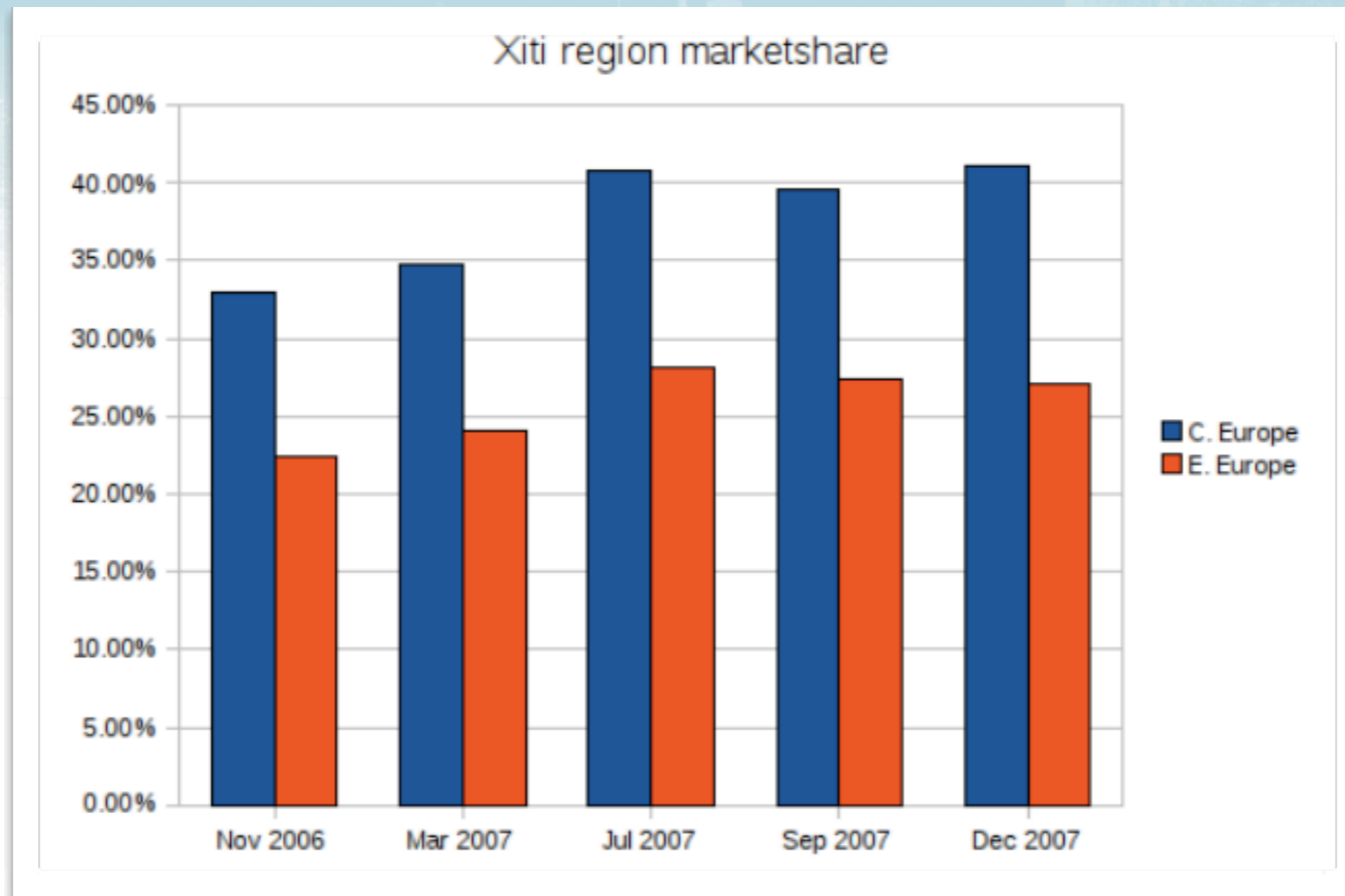
Inside Look 3: Mozilla in **Poland**

- 38 million citizens, 13 million Internet users
- 6.5 million Firefox users (40% of the market)
- Started in 1999
- Two projects:
  - **MozillaPL** - Community website, with forums, wikis, local Addons database
  - **Aviary.pl** - localization task force. Small, effective, pragmatic
- Great relations with press
- Localizing all Mozilla related projects
- MozillaPL is a central place for web standards, open projects
- AviaryPL is very prestigious

Poland: We're still growing

Badanie Megapanel PBI/Gemius realizowane przez Polskie

Okres badania: 04.2008

Grupa celowa: Populacja   n=18101

Witryny:

lp	nazwa witryny △▽	audyt site-centric	zasięg miesięczny △▽
1	Google		81.93%
2	Onet.pl*	tak	66.78%
3	Wirtualna Polska	tak	56.08%
4	nasza-klasa.pl	tak	51.11%
5	INTERIA.PL	tak	50.77%
6	Allegro.pl		50.64%
7	o2.pl	tak	47.60%
8	Gazeta.pl	tak	45.38%
9	wikipedia.org		42.07%
10	youtube.com		42.00%
11	Microsoft		37.68%
12	Grupa Fotka.pl		24.53%
13	Grupa Gadu-Gadu*	tak	24.35%
14	mozilla.org		23.47%
15	pf.pl	tak	21.98%
16	Orange		19.66%
17	sciaga.pl	tak	18.91%
18	Grupa IDG	tak	18.90%
19	otoMoto		18.25%
20	Pino.pl		17.36%

MegaPanel - most popular websites in Poland

Source: MegaPanel
http://panel.pbi.org.pl/

- Fx - +10% during last half a year
- Fx3 - 8.6% in 1 month
- Mozilla literally took over Wykop, OSNews, Gwar during Download Day and Fx3 launch

Poland: Beyond Firefox

- Market is hypnotized by us:
  - private mobiles to VP of Engineering of all major portals with request to "call them if anything goes wrong"
  - journalists says that "Firefox" on cover page boosts sells

- Our communities consider "project Firefox" as "done"

- Looking to promote values on top of it

- We have a unique opportunity to tell our story because the mainstream wants to listen.

- Openness, innovation, participation culture, data portability, web standards, mobile

Inside Look 3: Mozilla in **Ukraine**

- 46 million citizens, 5.5 million Internet users

- FX has 15% of the market

- Western Ukraine/Eastern Ukraine Duality

- Very young community

- Opera with exceptional **25%** of the market share

- Opera perceived as "trendy" while Firefox as "for geeks"

- Add-ons useless because of the language barrier

- Performance more important than in Western Europe

Inside Look 4: Mozilla in **Russia**

- 142 million citizens, 30-40 million Internet users

- FX has 20% of the market

- Euro-Asian dualism - focused on their independency

- Fastest growing Internet population

- 40 mln users online by the end of 2008 - 2nd place in Europe

mail.ru:	Firefox - 13.46%, Opera - 19.74%, IE - 66.68% (Firefox - 11.72%, Opera - 16%, IE - 72%).
rambler.ru:	Firefox - 11.71%, Opera - 14.39%, IE - 73.75% (Firefox - 9%, Opera - 12%, IE - 72%).
rbc.ru:	Firefox - 19.33%, Opera - 10.50%, IE - 69.95% (Firefox - 13%, Opera - 18%, IE - 68%).
gazeta.ru:	Firefox - 23.70%, Opera - 00.93%, IE - 75.11% (Firefox - 20%, Opera - 2% (!), IE - 77%).
auto.ru:	Firefox - 14.37%, Opera - 24.64%, IE - 60.85% (Firefox - 11%, Opera - 21%, IE - 67%).
lenta.ru:	Firefox - 22.59%, Opera - 17.92%, IE - 59.28% (Firefox - 16%, Opera - 20%, IE - 63%).
bash.org.ru:	Firefox - 22.26%, Opera - 52.90%, IE - 24.01% (Firefox - 20%, Opera - 49% (!), IE - 29%).
3dnews.ru:	Firefox - 27.36%, Opera - 35.54%, IE - 36.93% (Firefox - 20%, Opera - 30%, IE - 40%).
ixbt.com:	Firefox - 27.58%, Opera - 35.55%, IE - 36.61% (Firefox - 23%, Opera - 34%, IE - 42%).
opennet.ru:	Firefox - 48.85%, Opera - 29.80%, IE - 20.93% (Firefox - 43%, Opera - 30%, IE - 27%).
linux.org.ru:	Firefox - 50.35%, Opera - 30.13%, IE - 18.77% (Firefox - 45%, Opera - 28%, IE - 25%).

Inside Look 4: Mozilla in **Russia** - Communities
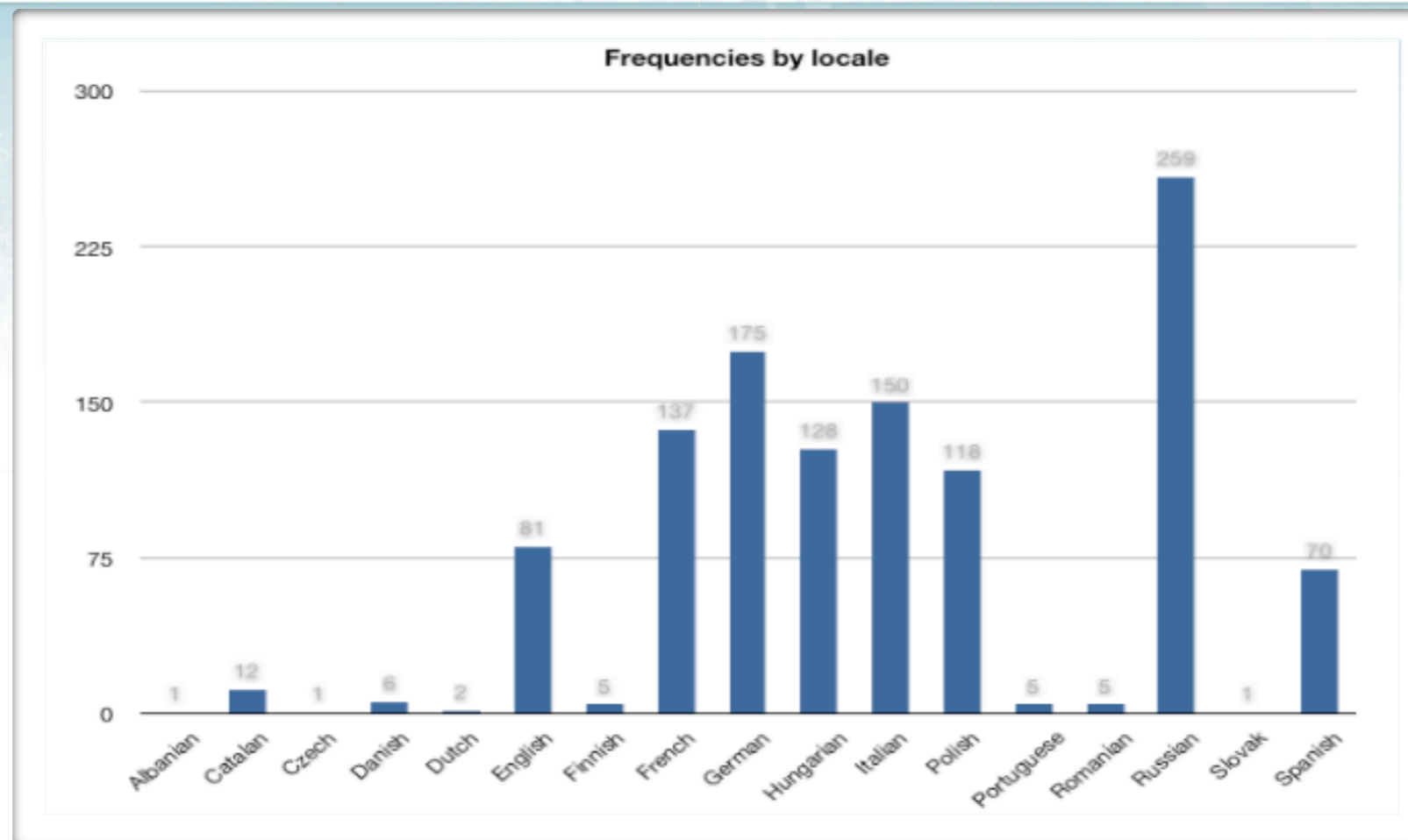
- Active and growing community - MozillaRU
- Opera is very strong
- Open source communities don't internalize Mozilla as a part of their environment, but they use Firefox

Firefox 3 Launch - Europe on the Leader Board

On the top 10 countries during the Download Day, 5 are located in Europe: Germany, UK, France, Spain & Turkey

8304091 (11610.6)
Total Downloads (downloads / minute)

🇩🇪 655987 4019.2	2577711 🇺🇸 1209.1
🇬🇧 294762 239.4	290025 🇫🇷 228.4
🇨🇦 223210 104.9	172753 🇨🇳 126.7
🇧🇷 185004 88.5	403194 🇯🇵 68.7
🇹🇷 71505 56.8	297464 🇪🇸 244.0

Updated: Wed, 18 Jun 2008 09:17:01 GMT

Firefox 3 Parties - Diversity celebrated

London

Madrid

Barcelona

Paris

Slovenia

Milano

Firefox 3 - Press: too much to count!

Averaging about 150-200 articles per locale right across high level IT, Business and Consumer publications...

BBC, Il Corriere della Sera, Le Figaro, Le Monde, FT, Daily Telegraph, El Pais, Rzeczpospolita, Sky News, Le Point.fr, Les Echos, JDnet.com, Le Nouvel Observateur, 20 minutes, LMI, Challenges, zdnet, 01net, Elle, Radio Suisse Romande, Sciences & Avenir, Focus, Stern, der Spiegel, Manager Magazin, Handelsblatt, Publico, ADN, ZDF Heute, ORF, n-tv, Süddeutsche Zeitung, Frankfurter Rundschau, Neue Osnabrücker Zeitung, Abenzeitung München, Fankfurter Allgemeine Zeitung, Hamburger Abendblatt, Hertener Allgemeine, Schwäbische Zeitung, Schwarzwälder, Bote, Südkurier, Baseler Zeitung (ch), Bieler Tagblatt (ch), Waltroper Zeitung, Stimberg Zeitung, Recklinhäuser Zeitung, Dattelner Morgenpost, Lübecker Nachrichten, Thüringische Landeszeitung, Marler Zeitung, Kleine Zeitung (aus), Badische Zeitung, Walsroder Zeitung, Wendlinger Zeitung, Westfälischer Anzeiger, Ostsee Zeitung, Esslinger Zeitung, Odenwälder Zeitung, Gießener Allgemeine, Fränkischer Tag, Rhein-Neckar-Zeitung, Reutlinger Generalanzeiger, Kölner Stadtanzeiger, Sächsische Zeitun, Il Corriere della Sera, La Repubblica - second largest daily, Il Sole 24 Ore, La Stampa, Panorama, Tech Radar, PC Pro, ZDNet, The Register, Dziennik, Polska, idg.pl, republika.onet.pl,
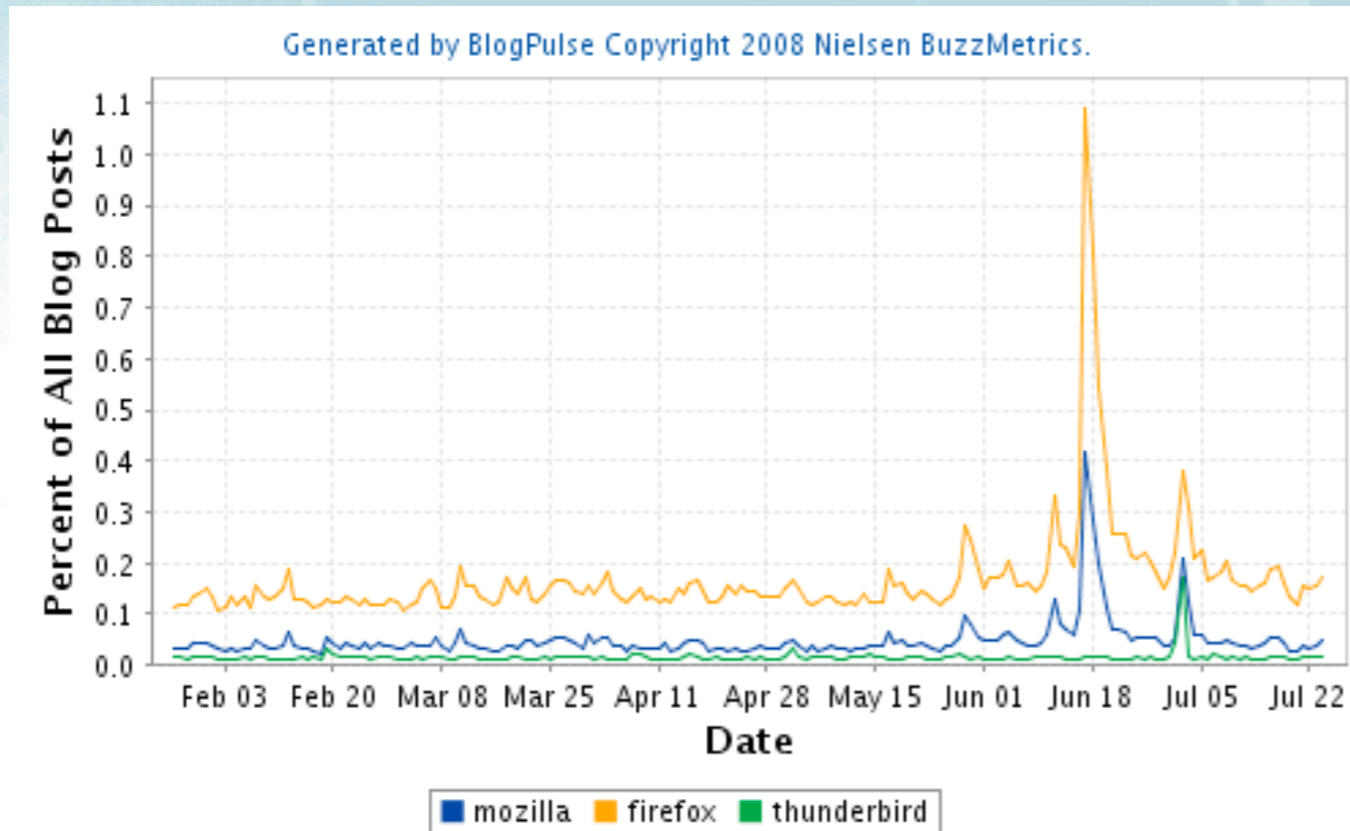
Press: doing better than much bigger companies

Rank		Company - Click on
1	=	Microsoft
2	=	Apple
3	=	Google
4	▲	Intel
5	▲	Sony
6	▼	Yahoo
7	=	IBM
8	=	Hewlett-Packard
9	=	Nokia
10	▲	Samsung
11	▲	AMD
12	▲	The Mozilla Organization
13	▼	YouTube
14	▲	Asus
15	▼	Sun Microsystems
16	▼	Facebook
17	=	Adobe
18	▼	Dell
19	▲	Cisco
20	▲	nVIDIA
21	▼	Microsoft X-Box and Games
22	▼	Vodafone
23	▲	Research in Motion
24	▼	Nintendo
25	▲	Sony Ericsson Mobile Commu

Top technology companies for press coverage in Europe, June '08.

Source: Apollo Surveys
http://www.apollosurveys.com/

Firefox 3 - More Bloggers than ever before!

Firefox 3 - Social "Mozilla" Networking in Europe

- Hundreds of members, messages, visits to Bebo (UK), tuenti (Spain) Grono.net & nasza-klasa (Poland) odnoklassniki (Russia), StudiVz (Germany)
- **Skyblog** (largest FR SNS) created a blog & released template for Fx 3 / Download Day:
  - 2,304 friends
  - over 89,304 visits
  - *more than 10,000 blogs have used the FX3 template*
  - http://firefox3.skyrock.com/

What did the launch of Firefox 3 teach us?

2 Things we already know…

•Press is one of our best tools to reach new audiences

•You (Contributors+users) are the greatest force of all!!

What's next for Marketing in Europe?

Press - even harder efforts...

- Big consumer push in September

- 3 visits to new publishing houses in EU

- Top 10 tip guides: customization & educational focus

- Announce new product news - Mobile, T-Bird, Fx 3.1

- More blogger events

- Keep the IT media interest in Mozilla's innovation - Labs, Mobile, Open Design

What's next for Marketing in Europe?

More people to empower local communities!

- More materials for Europe - Affiliate Buttons, Poster/Sticker templates, Guidelines, Get started Guides, Tip lists

- More support for your local events

- More in person Mozilla meet ups

- Events to get new people interested - Addon Garage, Mozilla Universities, Mozilla Camp EU

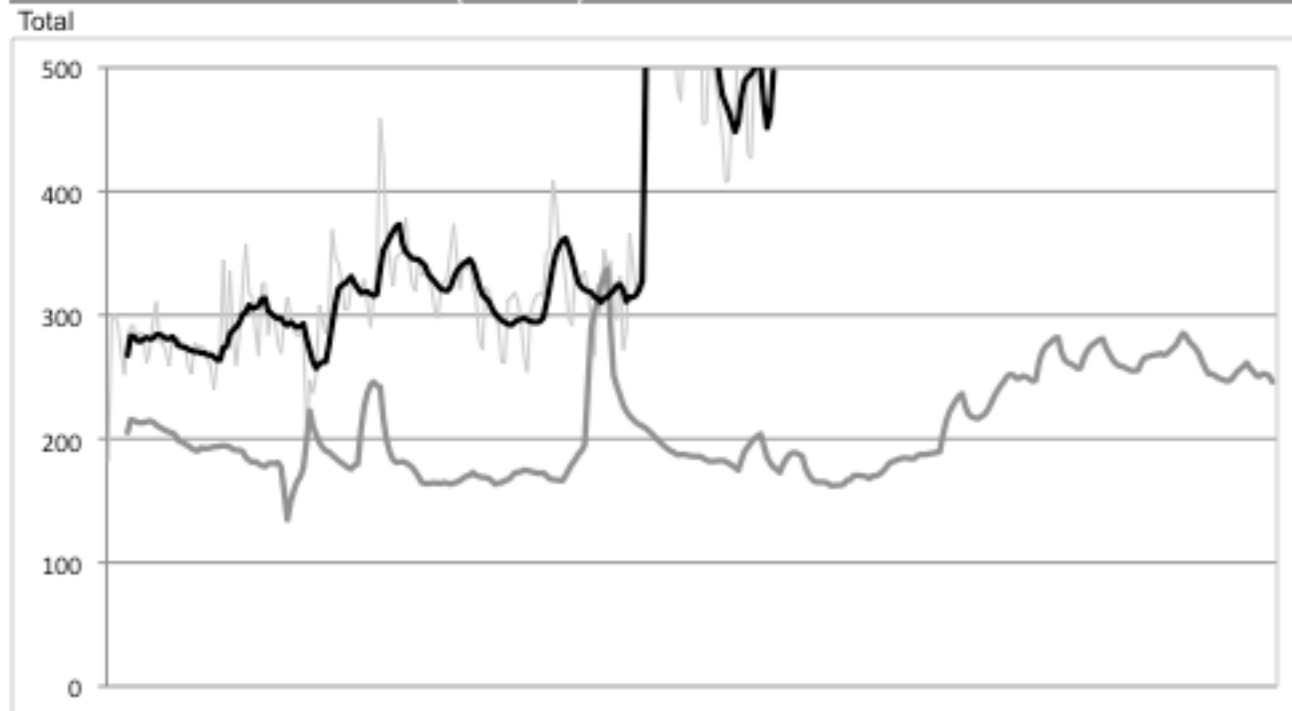- Mozilla Europe blog - more local posts from you!

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ADU Users of Firefox 3 in Europe
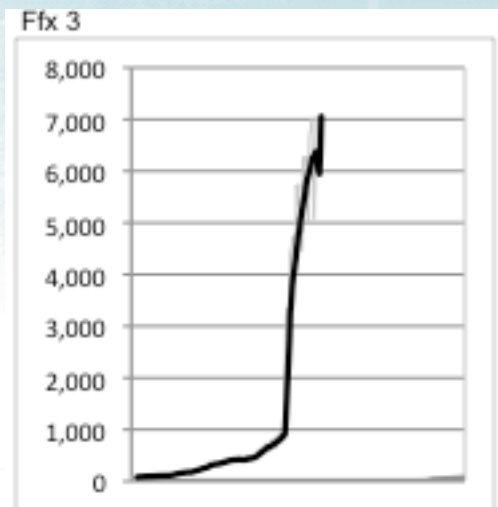
- Another 10m new Firefox users?

- Seeing what's after 50% market share in mature markets

  - How can we address the mainstream market?

- Empowering communities in markets where Internet penetration is still low.

Thank You