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Tuesday — March 30, 2010

What the Industry Reads First

Volume 21 / No. 060

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Set-Top Solution: Industry Weighs in on Universal Box Approach

As the industry continues to wait to find out just what the **FCC** wants to do with its universal set-top proposal in the National Broadband Plan, **Cable One** has some concerns about what it could mean for its waiver (the first of its kind) to deploy low-end, integrated set-tops with HD capability. Before the plan was released, Cable One execs told the **FCC** that suggestions for a one-size-fits all, network agnostic box or standard would have “a chilling effect on plans by small and mid-sized cable operators preparing to go all digital.” Such an environment would force Cable One to exercise “extreme caution” in moving forward with its upgrade plans, the MSO said in an FCC filing. Cable One has selected an unnamed vendor for its HD-capable, all-digital devices, but it now wants the FCC to expand the waiver to 200K from 20K boxes so that it can order enough to meet the \$50 price point. If granted, it would allow Cable One to test the HD ADDs in at least 8 additional systems beyond Dyersburg, TN. Should the FCC deem regulatory intervention necessary in the set-top market, it urged the Commission to find ways to foster innovation without interfering with existing business models and/or consider relief for small- and mid-sized cable ops. **Verizon** has visited the FCC to urge that a Notice of Inquiry vs a Notice of Proposed Rulemaking is adopted so the issue can be completely analyzed. The telco also cautioned against hasty action on Broadband Plan proposals aimed at “fixing” CableCARDS until a universal set-top solution is created. It cited unintended consequences that could flow from new technology mandates—particularly cable centric ones. **NCTA's Kyle McSlarrow** and **Comcast CTO Tony Werner** met last week with FCC Republican commissioners **Robert McDowell** and **Meredith Baker** (**CableLabs** pres/CEO **Paul Liao** joined in via phone). The execs talked up principles cable believes could anchor Commission and inter-industry efforts to develop a fully competitive retail marketplace. Cable supports retail availability of devices that can access any of operators' services, but it wants flexibility to accommodate different network architectures.

Rebirth: Nat Geo Wild officially replaced **Fox Reality** within the channel lineups of several ops on Mon, putting the channel in 40mln US homes. That's less than the nearly 50mln homes to which Reality was distributed, as **Mediacom** and **DirecTV** have so far declined to make the switch. Nevertheless, **Fox Cable** is pleased with the unveiling, saying Wild's uptake is notable and “clearly demonstrates the tremendous drawing power of the National Geographic brand and its content.” DirecTV and Mediacom failed to respond to inquiries by deadline. Carriers of Wild include **Comcast**, **Time War-**

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ner Cable and **DISH**. Established in 50 countries already, Wild traveled stateside with a comingled int'l/domestic budget that svp, dev and prod *Geoff Daniels* said last month will allow for a quick ramp in original productions. Half of the net's domestic lineup is now comprised of originals, including "Expedition Wild," featuring a naturalist and the grizzly bear he helped raise in captivity, and "Rebel Monkeys," spotlighting a mischievous gang in the Indian city of Jaipur.

Carriage: **Comcast** is launching **BET** and **MTV jv Centric**, aimed at African Americans 25-54, in **TV One's** Montgomery County, MD, backyard. -- **DirecTV** will feature **ESPN 3D** when it debuts in Jun, adding the net to its forthcoming lineup of dedicated 3D channels, including its own **N3D**. The DBS op's HD customers will gain free access to ESPN 3D. Separately, DirecTV will add **The Documentary Channel** to its lineup Wed, when the net's distribution will total 25mln homes.

Competition: Following Dec launches in Austin, San Antonio and St. Louis, **AT&T** expanded to all 120 U-verse TV markets an HSI service featuring speeds of up to 24Mbps. It's available to residential customers for \$65/month as part of a bundle with video, and to SMBs for \$95/month. -- **DirecTV** customers now have access to a TV app from **SpotCrime** that delivers near real-time crime data, including listings of local crime incidents and a map of that criminal activity.

In the States: **Charter** launched a free app for the iPhone, iPod and Blackberry that provides customers with up-to-date info on Charter services, such as VOD info and TV listings. -- **Broadstripe** introduced "Broadstripe Callback Service" in which subs can leave a number and get an expected return call time rather than wait on hold. -- **Go!TV HD** plans to bow Aug 1 as the 1st bilingual HD channel in the US through simultaneous English/Spanish delivery; it will feature Go!TV's full programming slate. -- **Cox** will offer free access to the planned 3D coverage from next week's **Masters** golf tourney (Apr 8-11) to Cox Advanced TV customers who own both a 3DTV and HD receiver. Separately, the MSO launched HSD speeds of up to 50Mbps for residential and business subs in Hampton Roads, VA. -- **XO Comm** bowed 40Gbps network services for enterprise and wholesale customers in all the major metro markets it serves.

Broadband: **Clearwire** bowed Clear mobile broadband services in Houston, its 28th 4G market, after last week announcing L.A., Miami and Pittsburgh as among the additional markets slated for '10 launches. -- **Google** said it received more than 1K community and 194K individual responses to the RFI surrounding its planned buildout of ultra high-speed broadband networks in certain locales (*Cfax*, 2/11). The co plans to announce its target community or communities by Dec. -- After gaining control of **Sky Terra** and with its additional spectrum, private equity firm **Harbinger Capital Partners** said it will be able to "implement an open next generation terrestrial network and mobile satellite system."

Advertising: The **Assoc of Hispanic Advertising Agencies** said **Time Warner Cable**, **DirecTV** and **DISH** are among the 40 US marketers who allocated more than 11.8% of their '09 ad budgets to Hispanic media. Overall, advertisers earmarked 5.4% of ad dollars to reach Hispanics in '09, up from 5.1% a yr earlier but down from 5.6% in '07.

Online: No word on whether **E!** now holds some important clout with **NBC**, but the net has again welcomed its annual Save One Show campaign, through which viewers vote at **EOnline.com** to save certain broadcast series in danger of being axed. 20 shows, including 6 from **ABC** and 5 from **NBC**, are eligible for votes this year; E! will announce the winner on Apr 12 within "E! News" and "Daily 10." Also, the net says it will help fans of the chosen show "fight like mad to keep it" on air and take the message directly to network execs.

Technology: **Massillon Cable** will deploy nodes and a headend platform from **Motorola** to extend capacity and achieve greater flexibility in introducing advanced services such as HD and VOD.

Ratings: **Lifetime Movie Net's** "Amish Grace" earned a 3.8 HH rating and 4.02mln total viewers Sun night to become the net's highest rated and most watched original movie ever.

Programming: **ABC Family's** summer schedule includes 3 new scripted series: "Pretty Little Liars," 4 estranged friends are reunited after another friend goes missing (June 8, 8pm), "Huge," follows teens and staff at a weight loss camp and half-hour comedy (June 28, 9pm) "Melissa & Joey," starring *Melissa Joan Hart* and *Joey Lawrence* as her manny (Aug premiere). -- "Joe Buck Live" is officially dead, with **HBO** pulling the plug on the occasional late night talk show after 3 eps. -- Everyday Martha could become a reality with **Crown Media** reportedly holding preliminary talks with **Martha Stewart Living Omnimedia** about forming a new company jointly owned by both. *B&C*, citing sources, said the 2 have already been sounding out distributors on the idea of a jv channel called **Hallmark Home**. Earlier this year, the 2 announced a

BUSINESS & FINANCE

multi-year deal that has “The Martha Stewart Show” moving from syndie to Hallmark in Sept and more Martha programming joining the net. -- **AMC** greenlit “The Walking Dead,” a 6-ep series based on the comic book series written by *Robert Kirkman* and published by **Image Comics** (Oct debut). -- **ESPN** inked with the **NFL** a deal to feature “MNF” telecasts live on its UK channel beginning next season, and its pre-game show “Monday Night Countdown” will precede the action. According to *SBJ*, the net’s also close to landing league-related digital rights, including for broadband and mobile.

Marketing: **Lifetime** will tap **NASCAR** to promote the Apr 11, Season 4 debut of “Army Wives.” On-car branding and talent appearances are set for Sat’s NASCAR Nationwide Series Nashville 300, airing at 3:30pm ET on **ESPN**.

JR Motorsports’ No 7 car, driven by *Scott Wimmer*, will be completely wrapped with “Army Wives” branding during the race. The net is also running a sweeps at myLifetime.com for a trip for 4 to a future NASCAR event.

People: *Leslie Chesloff* joined **Gospel Music Channel** from **Ion** as evp, programming.

Business/Finance: **OpenTV** finished redemption of its qualified outstanding Class A shares for \$1.55 per as part of **The Kudelski Group’s** Dec tender offer. As OpenTV’s Class A shares were voluntarily delisted from **NASDAQ**, approx 101K shares weren’t redeemed due to shareholder dissent.

CableFAX Daily Stockwatch

Company	03/29 Close	1-Day Ch	Company	03/29 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BRITISH SKY:	34.84	(0.43)	AMPHENOL:	42.42	0.96
DIRECTV:	33.23	(0.23)	AOL:	25.94	0.10
DISH:	20.48	0.02	APPLE:	232.39	1.49
DISNEY:	35.16	(0.15)	ARRIS GROUP:	12.24	0.07
GE:	18.40	0.06	AVID TECH:	13.99	(0.02)
NEWS CORP:	17.17	0.08	BIGBAND:	3.43	0.02
MSOS					
CABLEVISION:	23.96	0.23	BLNDER TONGUE:	1.11	0.07
COMCAST:	18.50	0.16	BROADCOM:	33.31	0.19
COMCAST SPCL:	17.62	0.08	CISCO:	26.51	0.04
GCI:	5.83	0.04	CLEARWIRE:	7.20	0.07
KNOLGY:	13.69	0.18	COMMSCOPE:	28.74	0.47
LIBERTY CAPITAL:	36.64	0.58	CONCURRENT:	5.96	0.51
LIBERTY GLOBAL:	28.78	0.15	CONVERGYS:	12.69	0.12
LIBERTY INT:	15.01	(0.03)	CSG SYSTEMS:	21.25	0.00
MEDIACOM:	6.15	0.07	ECHOSTAR:	19.76	(0.04)
RCN:	15.35	0.00	GOOGLE:	562.45	(0.24)
SHAW COMM:	19.73	0.14	HARMONIC:	6.40	(0.02)
TIME WARNER CABLE:	52.57	1.39	INTEL:	22.33	0.09
VIRGIN MEDIA:	16.96	0.07	JDSU:	11.96	0.18
WASH POST:	443.07	2.85	LEVEL 3:	1.59	(0.01)
PROGRAMMING					
CBS:	14.14	0.21	MICROSOFT:	29.59	(0.07)
CROWN:	1.97	(0.02)	MOTOROLA:	7.23	0.06
DISCOVERY:	33.60	0.01	PHILIPS:	32.30	0.05
GRUPO TELEVISA:	20.93	0.35	RENTRAK:	21.11	(0.15)
HSN:	30.85	0.36	SEACHANGE:	7.21	(0.2)
INTERACTIVE CORP:	22.87	(0.25)	SONY:	38.43	0.21
LIBERTY:	37.36	0.12	SPRINT NEXTEL:	3.79	(0.01)
LIBERTY STARZ:	53.19	0.31	THOMAS & BETTS:	38.81	0.83
LIONSGATE:	6.24	0.04	TIVO:	16.59	0.26
LODGENET:	7.10	0.05	TOLLGRADE:	6.28	(0.03)
NEW FRONTIER:	1.92	0.07	UNIVERSAL ELEC:	22.47	(0.03)
OUTDOOR:	6.77	0.17	VONAGE:	1.34	0.02
PLAYBOY:	3.65	(0.03)	YAHOO:	16.56	0.02
RHI:	0.19	(0.1)	TELCOS		
SCRIPPS INT:	44.07	0.22	AT&T:	26.51	0.27
TIME WARNER:	31.56	0.06	QWEST:	5.27	0.01
VALUEVISION:	3.48	(0.11)	VERIZON:	30.45	0.08
VIACOM:	35.88	0.43	MARKET INDICES		
WWE:	17.36	(0.24)	DOW:	10895.86	45.50
TECHNOLOGY					
3COM:	7.71	0.00	NASDAQ:	2404.36	9.23
ADC:	7.40	0.08			
ADVANTAGE:	2.32	0.09			
ALCATEL LUCENT:	3.32	0.07			
AMDOCS:	30.25	(0.47)			

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EYE ON INNOVATION

Masterful 3D

With the Masters just a little over a week away, **Comcast** is gearing up to provide consumers who own new 3DTVs and 3D-enabled PCs a window into the esteemed golf event like never before. In addition to all the technical logistics, the MSO also has to explain a very new technology to consumers—most of whom won't be able to see the 3D display.

To help spread the message, Comcast has produced a VOD tutorial explaining 3DTV and how it works. In other words, subscribers who absconded from the movie theater with their 3D glasses are out of luck as there won't be an anaglyph (traditional 3D) version of the golf tourney.

"The beauty of the golf course and the play is really meant for this latest generation 3D technology," said Comcast Fellow *Mark Francisco*. "We could create anaglyph from it, but the colorization lenses detracts from the overall experience. We don't want to confuse people. They want that cinematic 3D experience, so we're doing it realizing that not a lot of TVs have been sold. It's really a chance to get out in front of it."

Live 3D coverage will take place starting Apr 7 (3-5PM ET), with the Par 3 Contest and continue with the Masters Tournament Apr 8-11 with 2 hours each day (live tournament coverage starts at either 4pm ET or 5pm ET each day). In addition to 3DTVs, consumers will need HD or HD DVR set-tops to view the coverage.

Comcast has a relationship with **August National Golf Club** giving it the ability to carry the content. Other cable operators are expected to carry the 3D programming, with **Cox** confirming Mon that it will. Comcast is the official 3D distributor, so it will tier it out over fiber connections to any MSO that gets



rights to carry it as well. Additionally, there will be 3D On Demand assets for those with VOD rights. Comcast and **IBM**, the Tournament's technology partner, will partner to offer the 3D feed at www.masters.com.

Similarly to Comcast, Cox is creating a 3D 101 tutorial along with demos on how to hook up TVs to access 3D content. Additionally, many of its systems will host Masters in 3D viewing events in retail and showroom locations. There is also a place on Cox.com to answer customer questions about 3D and the Masters.

Last week, Comcast began running 3D test feeds across its system continuously to get ready for the big event. Live, closed circuit camera feeds will start a few days before tee-off.

"I have a 3D signal that's injecting where the cameras are going to connect to and we're backhauling all of that back to our **Comcast Media Center**, processing that and turning that around," said Francisco. "We've got a continuous dress rehearsal running right now."

Cablevision and **MSG** televised cable's 1st live sporting event using new 3D tech last week, a NY Rangers-Islanders hockey match that received pretty positive reviews. It was closely watched by Francisco.

"The nice thing about the cable industry is we can elaborate on technology, particularly through **Cable-Labs**. So we've been working amongst the MSOs for quite some time on common standards for multiplexing and transmission of 3D, and it's because of that that many of us can come and connect up to this Masters 3D content for distribution," Francisco said. "The format that Cablevision used... is similar, if not identical, to what we'll be using for the Masters."

-Amy Maclean

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