

CableFAX Daily™

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What the Industry Reads First

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Fast Lane: Comcast Begins DOCSIS 3.0 Rollout

Beginning Thurs, **Comcast** subs in the Twin Cities region can order up HSD speeds of up to 50Mbps downstream/ 5Mbps upstream. It marks the MSO's deployment of DOCSIS 3.0—technology it expects to have available to 20% of markets this year. 50Mbps is in line with other ultra fast offerings on the market today, including those from **Cablevision** and **Verizon's FiOS**. While the speed will start at 50Mbps, Comcast expects to deliver speeds of up to 100Mbps over the next 2 years and speeds of 160Mbps or higher in the future. Comcast is far from being the 1st to offer such speeds, but it does have the potential because of its size to be the 1st to offer it to a wide customer base. The price tag for its 50/5 service is \$149.95/month for residential customers and \$199.95/month for business customers. Additionally, Comcast is upping the speeds of its Performance and Performance Plus HSD tiers from 6Mbps/384kbps to 6Mbps/1Mbps and 8Mbps/768kbps to 8Mbps/2Mbps at no additional cost to consumers. Couple those services with its Power Boost, which provides extra speed as needed, and subs have the potential of reaching speeds of 12Mbps/2Mbps and 16Mbps/2Mbps. "This announcement marks the beginning of the evolution from broadband to wideband," said *Mitch Bowling*, svp and gm of Comcast High-Speed Internet, Comcast Cable. "Wideband is the future, and it's coming fast. We believe wideband will usher-in a new era of speed and Internet innovation for today's digital consumers." So why is the Twin Cities area the 1st launch market? It's operationally ready and has good track record when it comes to past deployments, a rep said.

Advertising: **Comcast** and **TiVo** continue to work together. On Mon, the MSO accepted the initial version of the "TiVo Interactive Advertising Management System" for future deployment on its platforms, according to a TiVo **SEC** filing. This acceptance occurred by the mutually agreed upon deadline of Mar 31. In addition to having TiVo develop a software solution for its DVR platform, Comcast and TiVo's initial agreement includes the deployment of the interactive ad system for the provision of local and national advertising.

New Friend: **AT&T** officially severed resale ties with **DirectTV** and is now exclusively cozy with **DISH**. The telco offers to customers in the former **BellSouth** territory (9 southeastern states) DISH video and potentially other bundled services. The exclusive pact could increase AT&T's video reach in a region sans **U-verse TV**, and **Sanford Bernstein** analyst *Craig Moffett* has said it will help DISH return "to the position of significantly faster growth than its peer." Moffett also sees the deal as a negative for DirecTV, but earlier this year the satcaster said AT&T's switch "will have minimal impact on our business in that we have a number of initiatives in place to provide incentives to energize dealers in the region, and we will step up our direct sales efforts." Both DISH and DirecTV shares advanced Wed.

Competition: **FiOS TV** has launched HD VOD services in 7 states, including CA, TX and MD, and in additional portions of PA. The telco already offers the services in FL, IN and VA, expects to add NY and OR in the coming weeks, and plans to offer 1K HD VOD titles this year. -- **DirectTV** launched **Disney Channel HD**, **ESPNNews HD**



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and **Toon Disney HD** on Wed. **Comcast** and **Time Warner Cable** have also launched Disney HD as well as **ABC Family HD** on some systems. -- **U-verse TV** subs may now watch slide shows and browse their online photos from **Flickr.com** on their TV screens. -- **AT&T** launched **U-verse Voice** in San Diego and Austin.

At the Portals: The **FCC** is seeking comment on whether conditions placed on **News Corp** as part of the Hughes transaction should be eliminated now that it has sold its controlling stake in **DirecTV** to **Liberty**. Those conditions include access to RSNs and local broadcast signals for rival video providers. Initial comments are due May 1.

Inside the Beltway: **NCTA** asked the DC Appeals Court Wed to intervene in **Comcast's** challenge of the **FCC's** cable horizontal ownership rules, which prevent a cable op from serving more than 30% of the country's pay TV subs. -- The Sen Commerce Committee rescheduled for Apr 24 an exec session scheduled for Wed to mark up a bill that would block the **FCC's** decision to relax broadcast media ownership rules. **Commerce Sec Carlos Gutierrez** recently wrote cmte chmn **Daniel Inouye** (D-HI), speaking out against the bill, suggesting **Pres Bush** would veto it.

Marketing: **NBCU** and **Liberty Mutual** have forged a cross-platform marketing and programming partnership that will deliver original movies to **NBC** and **USA**. The content is part of Liberty's marketing campaign tied to personal responsibility that will span numerous NBCU properties.

Mobile: **MobiTV** will offer through its mobile TV service a live simulcast of **Fox Business Net**.

VOD: **Gospel Music Channel** plans to re-launch its VOD channels Mon with new category titles and more intuitive navigation. A HD channel bows in May. -- **TVN** will distribute **WFN: World Fishing Net** through VOD in the US and Canada.

Hard Times: OK... not really hard times, but most of **Comcast's** top execs received less total compensation last year than in '06, including CEO **Brian Roberts**, whose compensation slipped to \$20.8mln from \$26mln due to option and bonus decreases. Only board member **Ralph Roberts** got an increase, from \$24.1mln to \$24.7mln. Other '07 compensation packages: evp/CFO **Michael Angelakis**, \$20.5mln; evp/COO **Steve Burke**, \$16.9mln; evp **David Cohen**, \$7.4mln; former evp/co-CFO **John Alchin**, \$8.1mln; and former evp/co-CFO **Laurence Smith**, \$8.1mln.

Ratings: Count **E!**, **Style Net**, and **History** as guests of cable's "Best Q Ever" party. **E!** scored in 1Q a historical best avg of 371K total viewers; **Style** set a record with 98K total viewers; and **History** rewrote its own history among total viewers (1.3mln), 25-54s (649K), men 25-54 (449K) and 18-49s (585K).

Programming: **DirecTV**, **NBC** and **Universal Media** partnered to launch a 3rd season of drama series "Friday Night Lights," which will broadcast initially on DirecTV (Oct) and then on NBC later in the season (Feb). -- **E!** greenlit a 2nd season of "Sunset Tan" (summer), a reality series from inside the eponymous tanning studios. -- **Elvis Costello** will host and **Elton John** will exec prod new **Sundance Channel** series "Spectacle" (Dec), featuring in-depth musical discussions and performances. Other forthcoming net projects include "On the Road in America" (Jun), a 12-part doc chronicling the travels of 4 Arabs, and "The Biggest Chinese Restaurant in the World" (Aug), set to coincide with the Beijing Olympics.

Beacon Bounty: Congrats to all of **ACC's** Beacon Awards winners and finalists, some of whom felt the politically incorrect wrath of comedian **Paul Mercurio** Tues night at DC's Mayflower hotel (he went table to table mercilessly teasing attendees and pulling no punches). The big Golden Beacon winner: **Discovery's** "Planet Earth." **ACC** handed out 72

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other Beacon awards, as well as several special honors. Accepting the President's Award, **Cox** pres *Pat Esser* said cable's "better and stronger story" thrived despite well-funded and highly staffed telco publicity machines. Meanwhile, fellow President's Award recipient *Meredith Wagner*, **Lifetime** evp, public affairs and corporate communications, told stories of her "sordid" past, including breaking her leg skiing while "going up a hill" and falling into a lake while trying to feed a swan at a friend's wedding. Her advice to communicators? Do your homework, make it real, always persevere.

Awards: Cable took home 10 **Peabody Awards**, including wins for **BBC America** ("BBC World News America" feature), **CNN** (news feature), **Showtime** ("Dexter"), **Discovery Channel** ("Planet Earth"), **HBO** (doc "To Die in Jerusalem"), **Bravo** ("Project Runway"), **Sundance Channel** ("Nimrod Nation"), **mtvU** (public affairs campaign), **AMC** ("Mad Men"), and **Comedy Central** ("The Colbert Report"). -- **Discovery's** "Planet Earth" also earned a '08 **Parents' Choice Gold Award**, as did the net's "Peep and the Big Wide World."

People: **Bravo** named *Lisa Hsia* svp, new media and digital strategy. -- Upon **Scripps'** split into 2 public companies, *Timothy King* will become vp, corporate communications, **E.W. Scripps** and *Mark Kroeger* will assume the same role for **Scripps Nets Interactive**.

CableFAX Daily Stockwatch

Company	04/02 Close	1-Day Ch	Company	04/02 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BRITISH SKY:	45.60	(0.15)	AMDOCS:	28.29	(0.72)
DIRECTV:	26.00	0.25	AMPHENOL:	39.03	0.17
DISNEY:	31.54	(0.37)	APPLE:	147.49	(2.04)
ECHOSTAR:	30.05	0.26	ARRIS GROUP:	5.96	(0.03)
GE:	38.02	(0.41)	AVID TECH:	25.04	0.41
HEARST-ARGYLE:	20.91	0.22	BIGBAND:	5.68	(0.26)
ION MEDIA:	1.45	0.00	BLNDER TONGUE:	1.45	(0.3)
NEWS CORP:	20.00	0.15	BROADCOM:	19.77	(0.62)
MSOS					
CABLEVISION:	22.50	0.05	CISCO:	24.96	(0.02)
CHARTER:	0.91	(0.03)	COMMSCOPE:	38.96	1.97
COMCAST:	20.48	0.34	CONCURRENT:	0.81	0.01
COMCAST SPCL:	20.06	0.24	CONVERGYS:	15.46	0.37
GCI:	6.55	0.22	CSG SYSTEMS:	11.57	(0.29)
KNOLOGY:	13.55	0.15	ECHOSTAR HOLDING:	30.43	0.24
LIBERTY CAPITAL:	16.08	0.27	GEMSTAR TVG:	4.90	0.08
LIBERTY ENTERTAINMENT:	23.12	0.14	GOOGLE:	465.70	(0.01)
LIBERTY GLOBAL:	35.15	0.17	HARMONIC:	7.89	(0.04)
LIBERTY INTERACTIVE:	16.93	0.28	JDSU:	13.93	(0.01)
MEDIACOM:	4.59	0.13	LEVEL 3:	2.06	(0.05)
ROGERS COMM:	42.97	0.00	MICROSOFT:	29.16	(0.34)
SHAW COMM:	19.53	0.06	MOTOROLA:	9.61	0.14
TIME WARNER CABLE:	27.86	1.67	NDS:	51.31	1.01
VIRGIN MEDIA:	14.42	(0.05)	NORTEL:	7.87	0.58
WASH POST:	685.00	12.10	OPENTV:	1.21	0.04
PROGRAMMING					
CBS:	22.79	(0.07)	PHILIPS:	39.35	0.07
CROWN:	5.10	(0.15)	RENTRAK:	12.25	0.15
DISCOVERY:	21.54	(0.22)	SEACHANGE:	7.42	(0.03)
EW SCRIPPS:	42.84	0.34	SONY:	41.97	0.24
GRUPO TELEVISIA:	25.19	0.15	SPRINT NEXTEL:	6.60	(0.08)
INTERACTIVE CORP:	21.39	0.17	THOMAS & BETTS:	39.03	0.81
LIBERTY:	1.00	0.00	TIVO:	8.97	0.07
LODGENET:	6.57	0.28	TOLLGRADE:	5.40	0.01
NEW FRONTIER:	4.67	0.19	UNIVERSAL ELEC:	25.57	0.47
OUTDOOR:	7.32	(0.09)	VONAGE:	1.91	(0.05)
PLAYBOY:	8.82	0.11	WEBB SYS:	0.03	0.00
TIME WARNER:	14.64	0.05	YAHOO:	27.82	(0.68)
UNIVISION:	36.23	0.00	TELCOS		
VALUEVISION:	5.58	(0.16)	AT&T:	38.72	(0.76)
VIACOM:	40.78	(0.07)	QWEST:	4.65	(0.05)
WWE:	18.53	(0.21)	VERIZON:	37.96	0.17
TECHNOLOGY					
3COM:	2.42	0.05	MARKET INDICES		
ADC:	12.62	0.20	DOW:	12608.92	(45.44)
ADVANTAGE:	3.79	0.03	NASDAQ:	2361.40	(1.35)
ALCATEL LUCENT:	6.11	0.07			

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Contact: Debbie Vodenos, Publisher
 at (301) 354-1695 or dvodenos@accessintel.com
 Erica Gottlieb, Account Manager,
 at (212) 621-4612 or egottlieb@accessintel.com

The **CableFAXIES** awards

Think about that for a minute...

Clearing the Smoke

Smoke screens, head fakes, misdirection plays and sleight-of-hand. Nope, not just on battle fields, playing fields or as part of a magic act. These are the normal tactics used in just about every political campaign, and not just those in which someone is running for office.

The political campaigns I'm talking about happen at the FCC and on Capitol Hill every day when various groups employ any tactic they can to either get their point across or to try to negate the point someone else is trying to make.



Steve Effros

A really good example has come up at the FCC with Verizon versus the Cable Guys.

It all started when the Cable Guys noticed that folks who were planning to switch their telephone service suddenly changed their minds. What was happening? Well, as you all know, in

order to switch your number from one carrier to another, the original service provider has to "release" the number so the new provider can put it back into service.

The Cable Guys complained to the FCC that apparently when the request has been sent to release the number (this is considered confidential information and may not be used for any other purpose), the telco has been notifying its marketing folks, who then go back to the customer seeking to switch and try to talk them out of it... offer them a deal, do anything to keep them.

That, the Cable Guys are arguing, is a gross misuse of confidential marketing data, and the FCC should order it stopped. A strong argument.

Rather than admit that was what they were doing and debate the validity of the confidentiality rules, Verizon shot back with a dense smoke screen. It complained to the Commission that there should be rules allowing it to

order the cessation of video service from a cable company—rather than the customer dealing with the cable company—when a customer wants to switch from cable to telco video.

Now that may sound like an "equivalent" issue, but that's just smoke. There is no requirement for the cable company to "release" anything that the telco would then provide to the customer. There is no "number portability" equivalent. The telco can provide video service immediately upon hooking up the customer whether the cable company is still doing it or not!

It's an effort to get the Commission to misdirect its attention from a significant issue to one that is just smoke and mirrors. It's the type of intentional creation of confusion we see a lot of these days.

Another one that may be far more significant was recently pointed out to me, and there are some very creative proposals about to be made on Capitol Hill and the Commission to avoid the public choking on the smoke.

A whole lot of retransmission consent negotiations are up for renewal by the end of 2008. But the DTV transition takes place at the beginning of 2009.

If the broadcasters intentionally drag those negotiations out and then start advertising that the channels will no longer be viewable on cable to create pressure, it will directly collide with the messages the government is trying to get out for a smooth DTV transition.

That type of smoke screen should not be allowed. Either the FCC or Congress should step in and prevent any dropping (from either side) of signals through the first quarter of next year. Let's not smother the public in more smoke.

Steve

T:703-631-2099
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For more info contact:

Debbie Vodenos, Publisher, at (301) 354-1695 or dvodenos@accessintel.com

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