

# CableFAX Daily™

Monday — July 6, 2009

What the Industry Reads First

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## Game Plan: Broadband Czar Outlines the Months Ahead

Thurs' FCC meeting may have marked *Julius Genachowski's* 1st as chmn, but *Blair Levin* had the spotlight with a detailed overview of strategy for drafting the Commission's national broadband plan. The ball got rolling before the meeting's 11:30am kick off when the FCC beta launched [www.broadband.gov](http://www.broadband.gov), a Website for the public to follow and provide input on bringing broadband everywhere. "This is the 1st policy proceeding to ever have a dedicated Website like this," said Levin, who was appointed last month by then-acting FCC chmn *Michael Copps* as broadband czar in charge of coordinating the FCC's plan. Future capabilities planned for the Website include broadband maps. Genachowski has pledged that the process for putting together the plan, which is due to Congress Feb 17, will be open and inclusive. More than 20 staff workshops are planned for Aug with Commission staff. Some of those will be open to the public and Webcast. Levin said the workshops are to provide input similar to the ex parte process, but in a more open manner. He also promised a "significant number" of hearings, some outside DC, on the broadband gap analysis and proposed solutions. With 230 days to go until the plan is due, Levin listed upcoming milestones. By Sept, he wants to report to the FCC the factual state of broadband. By Nov, he hopes to have a report on key broadband gaps. In Dec, a policy framework should be ready—but instead of recommendations, it will probably explain various parties' different approaches and seek Commissioners' feedback. In Jan, the goal is to report on the "opportunities to drive the national agenda," Levin said, referring to issues like healthcare, education and job creation on which Congress has requested broadband advice. "Broadband is not a solution to any single problem, but it's part of the solution to almost every problem our country faces," Genachowski said. **DTV Doings:** No FCC meeting could wrap without a look at last month's DTV transition. Calls to the DTV call center the week after the June 12 switch averaged 43K/day. That dropped to 21K/day for the week of June 22, and it's trending downward for the week of June 30, FCC staffers said. Most recent calls are status requests for converter box coupons; the FCC is expecting another spike this month as consumers get coupons and have questions about box installs, reception issues, etc.

**Cox Changes:** Cox engineering svp *Chris Bowick's* previously announced retirement became official June 30. In Jan, the MSO integrated its IT and engineering depts under *Scott Hatfield*, who became svp, technology. Bowick helped with the restructuring. Now, Cox has announced a few more moves shoring up the combination. *Mark Kaish* was named svp, technol-

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ogy ops, overseeing all Cox products. He had been vp, voice dev. *Steve Marsh* was named vp, technology customer ops. *Sung Yang* was named vp, prod dev and OSS, and *Guy McCormick* was upped to vp, technology business ops.

**Back In Action:** *Versus* welcomes the indomitable *Lance Armstrong* back to the **Tour de France** (Jul 4) this year after a 3-yr hiatus, during which the net's event coverage has steadily grown, from 27.4mln total viewers in '06 to 32.8mln last year. While the latter number exceeds the 31.9mln posted in '05, when Armstrong pedaled to his 7th victory, *Versus* expects the Lance factor to draw new viewers. "Once they get here, it's our job to give them an entertaining broadcast," said *Versus* evp, programming, prod and business operations *Marc Fein* of the expected casual Lance fans. 2 key programming enhancements will help: all stages will be delivered in HD for the 1st time, and slated is unprecedented access to **Team Garmin-Slipstream**, including meetings, race preparation and communication between the team and riders. Plus, improvements to linear coverage will only add to "all the momentum we're having leading up to the Tour," said *Fein*. Of course, the net's optimism may begin to deflate if Armstrong gets injured or performs poorly, but the net's stellar announcing team of *Phil Liggett* and *Paul Sherwen*, along with fellow cyclists, expect excitement. Said American rider *George Hincapie* during a Mon conference call: "I think this is probably one of the most interesting, exciting tours that we've seen in the last ten years."

**Carriage:** **Jewish Life TV** launched on channel 366 on **DirectTV**, boosting distribution to 24mln homes. The 24-hour Jewish-themed channel is available in some **Time Warner Cable** systems and on various independent systems.

**Competition:** **DirectTV** added local HD channels in 7 markets including Columbia, SC, and Lexington, KY, bringing to 133 the number of markets receiving such programming, or more than 91% of US TV homes.

**Still Going:** In the **DISH-TiVo** patent dispute that just won't end, a US Court of Appeals granted **DISH/EchoStar's** request for a stay of last month's District Court contempt order (*Cfax*, 6/4), meaning the DBS op's subs can continue using their DISH DVRs. **Collins Stewart** said DISH's appeal of DVR patent infringement will likely be heard in Nov, but that the court's Wed decision "enhances DISH's negotiating position in the potential setting of a licensing fee with TiVo." The firm had expected DISH to pay TiVo a fee of \$3-4 a sub per month to use its DVRs. TiVo shares plummeted 15.6% on the news.

**Advertising:** Self-regulatory precepts meant to protect consumer privacy in ad-supported interactive media were jointly released by the **American Assoc of Ad Agencies**, the **Interactive Ad Bureau**, the **Assoc of National Advertisers**, the **Direct Marketing Assoc** and the **Council of Better Business Bureaus**. Slated for '10 implementation, the opt-in program will require advertisers and Websites to clearly inform consumers about data collection practices and enable customers some control over that info. -- **National Cable Comm** is partnering with **Donovan Data Systems** to make fully electronic the order processing for national spot cable advertising. In 4 weeks since DDS' desktop app was integrated with NCC's sales system, NCC processed more than \$3mln in electronic orders from DDS agencies.

**On the Circuit:** The **Motorola Foundation** donated \$100K to help **The Cable Center's** Cable Mavericks Lecture Series.

**Business/Finance:** After assuming his **News Corp** posts of deputy chmn/pres/COO Wed, *Chase Carey* got a \$10mln signing bonus and is slated to earn a base salary of \$8.1mln/yr plus a performance-based bonus of up to \$25mln/fiscal yr and no less than \$5mln for the year ending Jun 30 '10. -- In a filing with the NY Bankruptcy Court handling its reorg, **Charter** posted a consolidated net loss of \$62mln in May on rev of \$565mln, vs a loss of \$37mln in Apr on rev of \$562mln. -- **Embarq** and **CenturyTel** completed their merger Wed and will become **CenturyLink**, pending shareholder approval.

The C-SPAN Networks are changing the satellite transmission of C-SPAN2 & C-SPAN3 to new digital feeds.

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**CableFAX Week in Review**

Company	Ticker	7/02 Close	1-Week % Chg	YTD %Chg
<b>BROADCASTERS/DBS/MMDS</b>				
BRITISH SKY:	BSY	29.72	(0.4%)	7.70%
DIRECTV:	DTV	23.99	(2.2%)	4.70%
DISH:	DISH	16.10	1.60%	45.20%
DISNEY:	DIS	22.84	(3%)	2.20%
GE:	GE	11.46	(3.4%)	(23.5%)
HEARST-ARGYLE:	HTV	4.50		(24.6%)
NEWS CORP:	NWS	9.98	(5.4%)	5.40%

Company	Ticker	7/02 Close	1-Week % Chg	YTD %Chg
<b>MSOS</b>				
CABLEVISION:	CVC	18.48	(2.7%)	11.50%
COMCAST:	CMCSA	13.89	(3.2%)	(16.5%)
COMCAST SPCL:	CMCSK	13.56	(2.5%)	(14.9%)
GCI:	GNCMA	6.83	(0.4%)	(15.6%)
KNOLGY:	KNOL	7.91	(10.4%)	53.30%
LIBERTY CAPITAL:	LCAPA	12.82	(3.6%)	172.20%
LIBERTY ENT:	LMDIA	26.00	(1.9%)	48.70%
LIBERTY GLOBAL:	LBTYA	15.40	(2%)	(3.3%)
LIBERTY INT:	LINTA	4.81	(3.6%)	54.20%
MEDIACOM:	MCCC	4.81	(9.6%)	11.90%
SHAW COMM:	SJR	16.36	(3.7%)	(4%)
TIME WARNER CABLE:	TWC	29.59		
VIRGIN MEDIA:	VMED	9.18	3.10%	86.40%
WASH POST:	WPO	343.25	(1%)	(9.8%)

Company	Ticker	7/02 Close	1-Week % Chg	YTD %Chg
<b>PROGRAMMING</b>				
CBS:	CBS	6.59	(8.6%)	(18.3%)
CROWN:	CRWN	1.55	(5.5%)	(45.6%)
DISCOVERY:	DISCA	22.08	5.00%	55.90%
EW SCRIPPS:	SSP	1.88	(13.8%)	(15%)
GRUPO TELEVISIA:	TV	16.81	0.10%	16.80%
HSN:	HSNI	9.92	7.20%	36.50%
INTERACTIVE CORP:	IACI	16.08	1.20%	2.20%
LIBERTY:	L	26.05	(5.5%)	(7.3%)
LODGENET:	LNET	3.49	0.60%	398.60%
NEW FRONTIER:	NOOF	2.34	1.30%	37.60%
OUTDOOR:	OUTD	6.02	8.70%	(19.6%)
PLAYBOY:	PLA	2.60	1.20%	20.40%
RHI:	RHIE	3.06	(15%)	(62.3%)
SCRIPPS INT:	SNI	26.58	(4.1%)	21.50%
TIME WARNER:	TWX	24.21	(4.8%)	10.00%
VALUEVISION:	VVTV	1.80	(13.9%)	445.50%
VIACOM:	VIA	23.10	(2.7%)	14.80%
WWE:	WWE	12.11	(3.7%)	19.00%

Company	Ticker	7/02 Close	1-Week % Chg	YTD %Chg
<b>TECHNOLOGY</b>				
3COM:	COMS	4.75	(2.9%)	108.30%
ADC:	ADCT	7.59	0.50%	39.10%
ADDVANTAGE:	AEY	1.80	6.50%	1.10%
ALCATEL LUCENT:	ALU	2.24	(11.5%)	4.20%
AMDOCS:	DOX	20.71	(1.5%)	13.20%
AMPHENOL:	APH	31.62	(0.2%)	32.00%
APPLE:	AAPL	140.02	0.10%	64.10%
ARRIS GROUP:	ARRS	12.13	2.10%	52.60%
AVID TECH:	AVID	12.49	(5%)	14.50%
BIGBAND:	BBND	4.95	(6.6%)	(10.3%)
BLNDER TONGUE:	BDR	1.36	(2.2%)	34.70%
BROADCOM:	BRCM	25.12	0.70%	48.00%

Company	Ticker	7/02 Close	1-Week % Chg	YTD %Chg
CISCO:	CSCO	18.50	(2.8%)	13.50%
CLEARWIRE:	CLWR	5.48	17.80%	38.00%
COMMSCOPE:	CTV	25.94	3.10%	66.90%
CONCURRENT:	CCUR	5.63	1.80%	64.70%
CONVERGYS:	CVG	8.77	0.90%	36.80%
CSG SYSTEMS:	CSGS	13.96	4.80%	(20.1%)
ECHOSTAR:	SATS	15.83	3.30%	6.50%
GOOGLE:	GOOG	408.49	(1.8%)	32.80%
HARMONIC:	HLIT	5.74	(2%)	2.30%
INTEL:	INTC	16.72	2.50%	24.90%
JDSU:	JDSU	5.26	(4.3%)	43.50%
LEVEL 3:	LVL	1.48	9.60%	111.40%
MICROSOFT:	MSFT	23.37	(1.8%)	22.20%
MOTOROLA:	MOT	6.19	(4.3%)	40.90%
OPENTV:	OPTV	1.28	(2.3%)	4.10%
PHILIPS:	PHG	17.65	(2%)	(1.9%)
RENTRAK:	RENT	16.24	(4.5%)	37.70%
SEACHANGE:	SEAC	7.85	(1.8%)	8.90%
SONY:	SNE	25.19	(5%)	15.20%
SPRINT NEXTEL:	S	4.32	(7.7%)	136.10%
THOMAS & BETTS:	TNB	28.28	(5.6%)	17.70%
TIVO:	TIVO	9.09	(14.3%)	27.00%
TOLLGRADE:	TLGD	5.25	1.50%	9.80%
UNIVERSAL ELEC:	UEIC	19.76	3.50%	21.80%
VONAGE:	VG	0.38	(7.3%)	(42.4%)
YAHOO:	YHOO	14.99	(3.5%)	22.90%

Company	Ticker	7/02 Close	1-Week % Chg	YTD %Chg
<b>TELCOS</b>				
AT&T:	T	24.59	(1%)	(9.4%)
QWEST:	Q	4.11	2.20%	19.50%
VERIZON:	VZ	30.18	(2.9%)	(6.9%)

Index	7/02 Close	1-Week % Chg	YTD %Chg	
<b>MARKET INDICES</b>				
DOW:	INDU	8280.74	(2.3%)	(5.6%)
NASDAQ:	COMPX	1796.52	(1.8%)	13.90%

**WINNERS & LOSERS**

**THIS WEEK'S STOCK PRICE WINNERS**

COMPANY	CLOSE	1-WK CH
1. CLEARWIRE:	5.48	17.80%
2. LEVEL 3:	1.48	9.60%
3. OUTDOOR:	6.02	8.70%
4. HSN:	9.92	7.20%
5. ADDVANTAGE:	1.80	6.50%

**THIS WEEK'S STOCK PRICE LOSERS**

COMPANY	CLOSE	1-WK CH
1. RHI:	3.06	(15%)
2. TIVO:	9.09	(14.3%)
3. VALUEVISION:	1.80	(13.9%)
4. EW SCRIPPS:	1.88	(13.8%)
5. ALCATEL LUCENT:	2.24	(11.5%)

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## MaxFAX...

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And goodness knows, we get asked a lot...

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Paul S. Maxwell

Contribute again... and, God bless, lots and lots of us do so...

Again and again.

I don't know of another industry that gives so much

so often in so many ways. **Kaitz, Emma Bowen, Cable Positive**, rescue dogs, homeless, scholarship funds, building playgrounds, stocking school libraries, the **Cable Center** and on and on.

So, of course, here are a couple more deserving opportunities to help out for things and folks that have done good in this business—not only for themselves, but the industry as well as others.

**Doing Some (More) Good #1:** We can join *Ron Cooper, Jill Stark* and *Jeannine Hansen* in honoring the life of *Mary White* by joining them at **Judi's House** ([www.judishouse.org/](http://www.judishouse.org/)) in Denver on July 18th (or anytime online)... when *Mary* was a **Comcast Colorado** executive,

she championed this organization that helps kids and families cope with the loss of a loved one. And this will help fund a room named in *Mary's* honor.

### Doing Some (More) Good #2:

One of my best friends—we were Army officers together in an earlier lifetime—almost died of leukemia... so that's something I've always favored for the random check in good years. But a blood cancer has hit some friends in the business, too... **C-SPAN's Bruce Collins** has been living with chronic myelogenous leukemia since '02. Bad stuff. So we can help him—and lots of others—by going to <http://nca.lla.sevent.org/BCollins> and making a donation or four. If we all give enough, **Blind Boy Whitehead** has agreed to NOT write a song about it. This benefits the **Leukemia & Lymphoma Society**—which developed the (no kidding) miracle drug **Gleevec**... which keeps some folks strumming their guitars.

### Random Notes:

• **Good Reading:** **CNBC's David Faber** takes a close, and reasoned, look at the origins of the financial meltdown from his front row seat in "And Then the Roof Caved In" (\$14.82 – Kindle edition)... the one-time winner of the **Cable Center's** press award has great anecdotes, too. Like the one when *Stan O'Neal* took over **Merrill Lynch**, he took

**CNBC** off all the TVs.

### • Friday the 3rd—Power Lunch!

Even though I don't live in New York, I've had lunch at the **Four Seasons** more than just a few times. When *Irving Kahn*, who officed above, was alive and I was in NY, it was either there (he bailed it out once) or at a dim sum place in Chinatown. These days, **Leo Hindery** has a regular table as the cream of the crop lunches there... this Friday, **CNBC's Bill Griffeth** takes you behind the scenes at noon EDT as the **Four Seasons** turns 50. Hard to believe—the original power lunch is aging but still potent... and being celebrated on "Power Lunch."

• **The Stimulus:** Make it make sense... at least a little bit. Strange to watch the **Federal Confusion Commission** come out of its lethargy... for too long, one bureau wasn't even allowed to talk with another. Was in there the other day as the new Chairman motivated his new troops... it is going to take awhile to get it organized... but the new guy sure has it moving.

Paul Maxwell

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