

CableFAX Daily™

Monday — August 22, 2011

What the Industry Reads First

Volume 22 / No. 161

Translucentwire: Futures Murky for Clearwire, Mobile Cable Broadband

Clearwire's difficult past few years have included funding shortages, mass management changes, tech issues, market encroachment by **Verizon** and **AT&T** and a sinking share price—all of which add up to continuing speculation about the company's future. Now, according to *Bloomberg*, cable ops including **Cablevision**, **Cox** and original Clearwire investors **Time Warner Cable** and **Comcast** are discussing with majority CLWR owner **Sprint** strategies to prop up (rescue?) the company. Possibilities include cash investments in Sprint, which could then turn around and pour additional funds into CLWR, or a large-scale acquisition of CLWR shares, which gained 30.3% Fri on all the speculation to close at \$3.01. After chopping through all the chatter and nuance, one key question remains: do cable ops really require a concerted wireless broadband push right now? Consider that CVC, TWC and CMCSA are having success with WiFi in the northeast and elsewhere, Cox offers wireless voice/broadband services in many markets and adoption of CLWR-based mobile broadband options from cable has largely been disappointing. "As we said on a couple of calls, our results in terms of actual customers so far are not terribly exciting," said TWC pres/CEO *Glenn Britt* during the MSO's 2Q earnings call. "So the evidence so far is there is not a big profit for the quadruple play." Even AT&T has said customers aren't clamoring for a quad-play bundle. **Wells Fargo Securities'** *Marci Ryvicker* sees opportunity in such an offering, however, and said "a deal with Sprint (and thus access to a 3G/4G **LTE** network) would be a superior wireless solution for the cable MSOs." Indeed, LTE has proven superior to Clearwire's **WiMAX** tech, to the point that CLWR wants to spend \$600mIn to convert its network to LTE. **BTIG's** *Richard Greenfield*, however, believes cable owns enough of a competitive advantage with wireline HSD that grand-scale wireless isn't a necessity. Cable ops declined to comment on Fri. On the finance side, BTIG's *Walter Piecyk* contends it would take more than \$10/share to take control of CLWR given all the partners involved. He also noted Sprint's plan to discuss its 4G strategy on Oct 7, so a definitive deal may soon surface, including one that could include assets from cable's **Spectrum Co.**

Mediacom Suits Up: Are you ready for some football? **Mediacom** is. For the 1st time ever, Mediacom will carry **NFL Net** and **NFL RedZone**. The longtime holdout is rolling out the channels on a market-by-market basis, with the flagship channel slated to be carried on the Digital Plus package. HD also will be carried in most markets. NFL RedZone will be offered on an a la carte basis for \$50 for a season. NFL 8-game, Thurs night package kicks off Nov 10. It also features preseason games, AFL, NFL Draft coverage and more. "We continue to invest to improve the products and services we provide to our customers, whether it's new programming, more HD channels, faster internet speeds or better telephone service," said *Steve Purcell*, Mediacom's regional vp of operations, in a statement.

In the Courts: It seems fewer features of **Deion Sanders** dressed as a fairy are on tap now that **DirectTV** has either discon-

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tinued or modified certain **NFL Sunday Ticket** promo ads in which Sanders appears. Or so said **Comcast** late Fri, adding it withdrawn its related false advertising lawsuit (**Cfax**, 8/5) as a result. **DirectTV** did not respond to inquiries by deadline.

New Chapter: After dropping its \$1bln bid to acquire **Barnes & Noble**, **Liberty** is investing \$204mln in the book-seller. The deal, announced after market close Thurs, has Liberty purchasing preferred shares, convertible into 12mln common shares (17% of company's stock) at \$17/share. Liberty CEO *Greg Maffei* and svp *Mark Carleton* will join Barnes & Noble's board. Consensus is that *John Malone* will still be able to dabble with an emerging technology (B&N's Nook e-reader), and the money will help B&N push the Nook more.

Marketing: **MLB** announced its "Legends Are Born in October" post-season campaign Fri featuring players including *Derrek Jeter*, *Albert Pujols* and *David Ortiz*. The 1st spot hits **Fox** on Aug 20, **TBS** and **ESPN** on Aug 21, and the campaign will continue through Oct with multiple TV and digital executions on Fox, TBS, ESPN and **MLB Net**. -- **Bravo** is bringing some favorite *Real Housewives* from across the country to one stage in the "Real Housewives Live Tour." Fans will be able to see the Housewives up-close, learn cast secrets and ask questions. True fans can indulge in the Red Carpet Ticket Package, \$170, for access to a pre-show cocktail party hosted by the Housewives, a walk down the red carpet and premium seating. The tour will be in Atlantic City on Oct 1, Chicago on Oct 8, and Atlanta on Oct 15 with tickets starting at \$49.50.

Research: The Millennials generation's penchant for mobility and the Web has already altered the media landscape, and considering the generation is young and larger than the Baby Boomers, it will largely dictate the future of media. According to a study by **Barkley, Service Management Group** and **The Boston Consulting Group**, Millennials consume 42% of TV shows online, compared to 18% for non-Millennials, and just 26% of the group watches more than 20 hours of TV/week (compared to 49%). The generation also overindexes all others in DVR and VOD use.

Ratings: **Lifetime's** "Project Runway" scored a season high 3.1mln total viewers Thurs night and 1.6mln 18-49s, up 11% and 14% week-to-week, respectively. Among 25-54s, the 1.6mln avg tied its season 9 high.

Programming: **BET** pays tribute to late R&B star *Aaliyah* with 1-hour special, "Aaliyah: One in a Million" (Thurs, 8pm). Thurs marks the 10-year anniversary of her death. -- **Versus/NBC Sports Net's** regular-season **NHL** schedule includes 99 games, starting with an Oct 6 double-header. -- Filmmakers *Joe Berlinger* and *Bruce Sinofsky* were in court Fri to witness the decision releasing the "West Memphis 3," the subjects of their acclaimed "Paradise Lost" docs. In Jan, **HBO** will debut "Paradise Lost 3: Purgatory," telling the entire story from the '93 arrests to the appeals process and new evidence. Three teens were arrested and convicted of brutally raping and killing three 8-year-old boys. The films ignited a nationwide debate on their innocence or guilty, with celebs such as *Johnny Depp* and *Henry Rollins* coming out in the teens' support. "To see our work culminate in the righting of this tragic miscarriage of justice is more than a filmmaker could ask for," Berlinger said. -- **TV One** will offer live coverage of the MLK Jr Memorial dedication Aug 28 from 9am to 1pm. *Roland Martin*, **Sirius XM's** *Joe Madison* and *Art Fennel* of **The Comcast Network** will anchor coverage.

On the Circuit: **Motorola Solutions Foundation** announced recipients of its Innovation Generation Grants. Now in its 5th year, the program awards \$5.5mln to 100 non-profits that foster STEM initiatives for teachers and students. This year's recipients include **GAMES—Girls' Adventures in Math, Engineering and Science**, which lets high school girls in IL explore engineering and scientific fields through demonstrations, classroom presentations and hands-on activities.

CableFAX
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Most Influential Minorities in Cable issue

Be part of Diversity Week! This issue profiles CableFAX's most influential minorities in cable, winners of NAMIC's EMMA Awards (Excellence in Multicultural Marketing Awards), and the Top 10 Places to Work.

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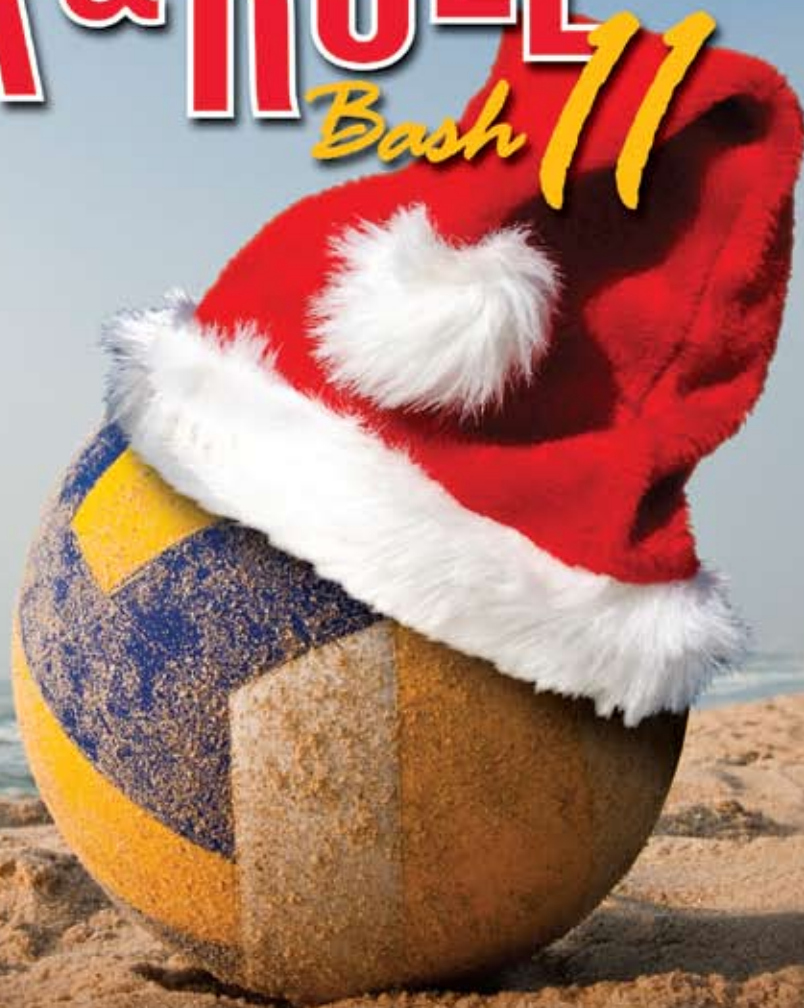
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CableFAX Week in Review

Company	Ticker	8/19 Close	1-Week % Chg	YTD %Chg
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BROADCASTERS/DBS/MMDS

DIRECTV:	DTV	41.93	(3.25%)	5.01%
DISH:	DISH	21.86	(5.37%)	11.19%
DISNEY:	DIS	31.85	(3.75%)	(15.09%)
GE:	GE	15.09	(4.97%)	(15.75%)
NEWS CORP:	NWS	15.80	(5.22%)	(3.78%)

MSOS

CABLEVISION:	CVC	16.97	(9.45%)	(49.85%)
CHARTER:	CHTR	46.59	(1.36%)	19.65%
COMCAST:	CMCSA	19.96	(3.29%)	(9.15%)
COMCAST SPCL:	CMCSK	19.80	(2.46%)	(4.85%)
GCI:	GNCMA	7.90	(5.73%)	(37.6%)
KNOLOGY:	KNOL	13.05	(2.25%)	(16.51%)
LIBERTY CAPITAL:	LCAPA	65.67	(5.51%)	4.97%
LIBERTY GLOBAL:	LBTYA	36.64	(7.24%)	3.56%
LIBERTY INT:	LINTA	13.74	(8.76%)	(12.87%)
SHAW COMM:	SJR	21.39	(0.42%)	0.05%
TIME WARNER CABLE:	TWC	61.76	(5.72%)	(6.47%)
VIRGIN MEDIA:	VMED	23.27	(1.57%)	(14.57%)
WASH POST:	WPO	338.20	(5.28%)	(23.05%)

PROGRAMMING

AMC NETWORKS:	AMCX	33.05	(1.84%)	(17.06%)
CBS:	CBS	22.04	(11.59%)	15.70%
CROWN:	CRWN	1.19	(4.8%)	(54.58%)
DISCOVERY:	DISCA	36.32	(6.94%)	(12.9%)
GRUPO TELEVISIA:	TV	19.53	(3.27%)	(24.68%)
HSN:	HSNI	29.51	(7%)	(3.72%)
INTERACTIVE CORP:	IACI	34.34	(9.23%)	19.65%
LIBERTY STARZ:	LSTZA	65.62	(8.11%)	(1.29%)
LIONSGATE:	LGF	7.08	1.14%	8.76%
LODGENET:	LNET	1.79	(10.05%)	(57.88%)
NEW FRONTIER:	NOOF	1.17	3.72%	(37.99%)
OUTDOOR:	OUTD	6.11	(8.12%)	(14.78%)
SCRIPPS INT:	SNI	38.85	(8.97%)	(24.93%)
TIME WARNER:	TWX	27.90	(6.5%)	(13.27%)
VALUEVISION:	VVTV	3.22	(40.92%)	(47.3%)
VIACOM:	VIA	49.89	(9.96%)	8.79%
WWE:	WWE	8.82	(6.57%)	(38.06%)

TECHNOLOGY

ADVANTAGE:	AEY	2.26	(5.83%)	(28.03%)
ALCATEL LUCENT:	ALU	3.33	(10%)	12.50%
AMDOCS:	DOX	25.97	(5.25%)	(5.46%)
AMPHENOL:	APH	42.13	(9.4%)	(20.18%)
AOL:	AOL	12.24	3.90%	(48.38%)
APPLE:	AAPL	356.03	(5.56%)	10.38%
ARRIS GROUP:	ARRS	9.85	(5.29%)	(12.21%)
AVID TECH:	AVID	9.64	(11.32%)	(44.79%)
BIGBAND:	BBND	1.46	(9.32%)	(47.86%)
BLINDER TONGUE:	BDR	1.27	(9.29%)	(39.52%)
BROADCOM:	BRCM	31.29	(7.54%)	(28.15%)
CISCO:	CSCO	15.08	(5.69%)	(25.46%)
CLEARWIRE:	CLWR	3.01	57.59%	(41.55%)
CONCURRENT:	CCUR	5.85	(1.52%)	15.61%
CONVERGYS:	CVG	9.29	(7.93%)	(29.46%)
CSG SYSTEMS:	CSGS	12.86	(8.21%)	(32.1%)

Company	Ticker	8/19 Close	1-Week % Chg	YTD %Chg
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ECHOSTAR:	SATS	22.60	(10.21%)	(9.49%)
GOOGLE:	GOOG	490.92	(12.92%)	(17.35%)
HARMONIC:	HLIT	4.74	(12.22%)	(44.69%)
INTEL:	INTC	19.19	(14.06%)	(8.75%)
JDSU:	JDSU	9.88	(14.24%)	(31.77%)
LEVEL 3:	LVL	1.66	(13.09%)	69.39%
MICROSOFT:	MSFT	24.05	(4.18%)	(13.83%)
MOTOROLA MOBILITY:	MMI	37.86	54.72%	30.10%
RENTAK:	RENT	11.57	(15.79%)	(61.64%)
SEACHANGE:	SEAC	6.96	(11.11%)	(18.6%)
SONY:	SNE	20.53	(4.47%)	(42.51%)
SPRINT NEXTEL:	S	3.42	6.88%	(19.15%)
THOMAS & BETTS:	TNB	38.20	(11.98%)	(20.91%)
TIVO:	TIVO	7.88	(2.11%)	(8.69%)
UNIVERSAL ELEC:	UEIC	17.81	0.85%	(37.22%)
VONAGE:	VG	2.84	(11.53%)	26.79%
YAHOO:	YHOO	12.92	(4.93%)	(22.31%)

TELCOS

AT&T:	T	27.99	(3.25%)	(4.73%)
VERIZON:	VZ	34.71	1.20%	(2.99%)

MARKET INDICES

DOW:	DJI	10817.65	(4.01%)	(6.56%)
NASDAQ:	IXIC	2341.84	(6.62%)	(11.72%)
S&P 500:	GSPC	1123.53	(4.69%)	(10.66%)

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. CLEARWIRE:	3.01	57.59%
2. MOTOROLA MOBILITY:	37.86	54.72%
3. SPRINT NEXTEL:	3.42	6.88%
4. AOL:	12.24	3.90%
5. NEW FRONTIER:	1.17	3.72%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. VALUEVISION:	3.22	(40.92%)
2. RENTAK:	11.57	(15.79%)
3. JDSU:	9.88	(14.24%)
4. INTEL:	19.19	(14.06%)
5. LEVEL 3:	1.66	(13.09%)



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