

CableFAX Daily™

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What the Industry Reads First

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Irene Looms: MSOs Make Hurricane Preparedness Plans

As Irene came closer to landfall Friday, MSOs up and down the East Coast ramped up for the 1st major Atlantic hurricane of the season. **Charter**, which operates systems in the Outer Banks, was heeding evacuation orders Fri. Charter's emergency plan encompasses themes common across a majority of the MSOs' emergency plans including an emphasis on employee communication, the ability to pull employees and resources from other locations to help in storm hit areas, coordination with government emergency responders and the preparation of generators for loss of commercial power. **Cox** has had some recent practice runs, participating in 2 exercises in VA including the "Federal Government's ESF-2 exercise in April which simulated a large scale hurricane strike at Virginia beach, extremely similar to this [Irene] scenario," said *Jim Shortal*, Cox dir of business continuity. "So we not only have the plan, but we exercise it. We try to develop the exercise to stress the plan and try to make sure we're leaving with a better concept of operations." Learning from the experience of Hurricane Katrina, Cox uses "a toll-free phone number that employees can call to report on their whereabouts, their status and their needs" as well as other forms of communications to coordinate with its employees including email, phone and a company website, according to Shortal. While Florida may have escaped Irene's wrath, operators never let their guard down. "We assume that anything that could come our way is coming our way," said *Jim Waldo*, **Atlantic Broadband's** svp and gm of FL. As of Fri afternoon, the National Hurricane Center had issued a hurricane warning from NC to NJ and a hurricane watch up to Massachusetts, although they stated "watches and warnings will likely be extended Northward into New England this afternoon." Irene is expected to approach the coast of North Carolina on Fri night as a Category 2 storm. "Unfortunately we have experience dealing with hurricanes so we know the steps that need to be taken so that if we do get hit we can restore services to our customers as soon as its safe," said a **Time Warner Cable** rep. TWC has more than 5.9mln residential and business customers from the Carolinas to New England. It has placed Business Recovery Unit trailers in key locations so restoration efforts can begin as soon as possible and will even have customer care reps taking calls from their living rooms. Perhaps looking for the silver lining, Charter's vp of tech ops, *Keith Hayes*, recalled a story of **SCTE** pres/CEO *Mark Dzuban* being able to watch **The Weather Channel** via Charter as *Jim Cantore* broadcast from outside Dzuban's North Carolina home during Hurricane Earl. "The people who live there are prepared for

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it, housing is built to withstand high winds and storm surging and most of the network, whether it's us or the power company, is... hardened for a reasonable amount of wind pressure," Hayes said. Dzuban had planned on heading down to his house in Hatteras, NC, (known to some as the Cable Hotel) Thurs night before Irene got in the way. While the home is built to sustain a category 3 or 4 storm, he said you never know what's going to happen. SCTE will launch a disaster recovery program next year as part of its Smart Energy Management Initiative. It will look at everything from sustaining operation of the network during natural and man-made disasters to how systems can help one another, including on a loan basis. It's the 1st such program for the industry. "There are so many other priorities that this is not high on the list. I think this is the right time for us to step up on a much larger scale, and I think the focus is there now with the MSOs," Dzuban said.

Canoe Course: More changes at **Canoe** following *Kathy Timko* assuming the CEO post last month after *David Verlin*'s departure. *Arthur Orduña* has shifted from CTO to chief product officer, a new role designed to ensure Canoe's product strategies are aligned with the marketplace and priorities of Canoe's MSO owners. All product gms, including VOD DAI and ITV, will report to him. The team of GMs will expand as Canoe enters new business areas. *Joel Hassell*, previously svp, engineering, steps into the CTO spot. "I am confident that this alignment of Canoe's organization best positions the company for its next phase, which is focused on scale and growth," Timko said. "These changes will enable us to better serve networks, advertisers, agencies and distributors with compelling advanced solutions for TV."

Carriage: No deals with **Time Warner Cable, Comcast, DirecTV**, etc, but **Longhorn Net** did announce a few smaller deals before Fri's evening launch. **Consolidated Comm, En-Touch Systems, E-Tex Comm, Bay City Cablevision, Mid-Coast Cablevision** and **Texas Mid-Gulf Cablevision** will launch the U of TX-focused net, which televises its 1st football game on Sept 3. A distribution deal with **Verizon FiOS** was previously announced.

Deals: **Hulu** rumor du jour Friday: **DISH**, which *Bloomberg* reported has signed nondisclosure agreements to access Hulu financials. "Hulu could fit nicely into [*Charlie*] *Ergen*'s longer term plans, which we believe include an over-the-top service," said **Wells Fargo Securities Marci Ryvicker**.

At the Portals: The **FCC** restarted its informal shot clock on the proposed **AT&T-Mobile** transaction Fri, day 83 on the 180-day clock for reviewing the deal. The FCC said AT&T had submitted new models and answered FCC questions.

Retrans: **ACA** CEO *Matt Polka* lit into **LIN** for threatening to pull its signal from **Mediacom** with Hurricane Irene about to hit. LIN and Mediacom's agreement expires Wed. Stations in Mediacom's Portsmouth-Norfolk, VA, market are included, with that area forecasted to take a direct hit. "That LIN is willing to put its desire to fatten its bottom line ahead of public safety in the aftermath of a major weather emergency is contemptible, and it puts people at risk as they assess the scope of their property damage and their ability to return safely to homes they were forced to flee," Polka said, calling on the **FCC** to step in.

Ratings: **MTV**'s "Jersey Shore" delivered 8.47mIn total viewers Thurs, making it the 7th most-watched MTV series telecast of all time. A special ep will air Sun at 7pm leading into the VMAs.

Programming: **USA** ordered Season 4 of "White Collar." Season 3 returns with 6 eps in Jan. -- **Nat Geo** presents a personal look at the events of 9/11 as told by the then president in "George W. Bush: The 9/11 Interview" (Sun, 10pm). "The idea behind the film was that he [Bush] would be the only person speaking. It turned out we wouldn't even have a narrator," said prod/dir of the doc, *Peter Schnall* who sat with the president for four hours of interviews over the course of 2 days.

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CableFAX Week in Review

Company	Ticker	8/26 Close	1-Week % Chg	YTD %Chg
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BROADCASTERS/DBS/MMDS

DIRECTV:	DTV	42.51	1.38%	6.46%
DISH:	DISH	22.24	1.74%	13.12%
DISNEY:	DIS	32.40	1.73%	(13.62%)
GE:	GE	15.54	2.98%	(13.23%)
NEWS CORP:	NWS	17.01	7.66%	3.59%

MSOS

CABLEVISION:	CVC	17.35	2.24%	(48.73%)
CHARTER:	CHTR	47.64	2.25%	22.34%
COMCAST:	CMCSA	20.57	3.06%	(6.37%)
COMCAST SPCL:	CMCSK	20.37	2.88%	(2.11%)
GCI:	GNCMA	8.07	2.15%	(36.26%)
KNOLOGY:	KNOL	13.23	1.38%	(15.36%)
LIBERTY CAPITAL:	LCAPA	66.54	1.32%	6.36%
LIBERTY GLOBAL:	LBTYA	36.00	(1.75%)	1.75%
LIBERTY INT:	LINTA	15.21	10.70%	(3.55%)
SHAW COMM:	SJR	21.95	2.62%	2.67%
TIME WARNER CABLE:	TWC	63.51	2.83%	(3.82%)
VIRGIN MEDIA:	VMED	24.27	4.30%	(10.9%)
WASH POST:	WPO	335.05	(0.93%)	(23.77%)

PROGRAMMING

AMC NETWORKS:	AMCX	34.30	3.78%	(13.93%)
CBS:	CBS	23.17	5.13%	21.63%
CROWN:	CRWN	1.30	9.24%	(50.38%)
DISCOVERY:	DISCA	39.52	8.81%	(5.23%)
GRUPO TELEVISIA:	TV	20.30	3.94%	(21.71%)
HSN:	HSNI	31.43	6.51%	2.54%
INTERACTIVE CORP:	IACI	38.01	10.69%	32.44%
LIBERTY STARZ:	LSTZA	66.32	1.07%	(0.24%)
LIONSGATE:	LGF	7.33	3.53%	12.60%
LODGENET:	LNET	1.80	0.56%	(57.65%)
NEW FRONTIER:	NOOF	1.22	4.27%	(35.45%)
OUTDOOR:	OUTD	6.29	2.95%	(12.27%)
SCRIPPS INT:	SNI	39.59	1.90%	(23.5%)
TIME WARNER:	TWX	29.92	7.24%	(6.99%)
VALUEVISION:	VVTV	3.35	4.04%	(45.17%)
VIACOM:	VIA	55.25	10.74%	20.48%
WWE:	WWE	9.06	2.72%	(36.38%)

TECHNOLOGY

ADVANTAGE:	AEY	2.14	(5.31%)	(31.85%)
ALCATEL LUCENT:	ALU	3.46	(6.49%)	16.89%
AMDOCS:	DOX	26.79	3.16%	(2.48%)
AMPHENOL:	APH	44.49	5.60%	(15.71%)
AOL:	AOL	14.43	17.89%	(39.14%)
APPLE:	AAPL	383.58	7.74%	18.92%
ARRIS GROUP:	ARRS	10.27	4.26%	(8.47%)
AVID TECH:	AVID	9.45	(1.97%)	(45.88%)
BIGBAND:	BBND	1.39	(4.79%)	(50.36%)
BLINDER TONGUE:	BDR	1.22	(3.94%)	(41.9%)
BROADCOM:	BRCM	33.91	8.37%	(22.14%)
CISCO:	CSCO	15.32	1.59%	(24.27%)
CLEARWIRE:	CLWR	2.70	(10.3%)	(47.57%)
CONCURRENT:	CCUR	5.81	(2.19%)	14.82%
CONVERGYS:	CVG	9.79	5.38%	(25.66%)
CSG SYSTEMS:	CSGS	12.82	(0.31%)	(32.31%)

Company	Ticker	8/26 Close	1-Week % Chg	YTD %Chg
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ECHOSTAR:	SATS	23.16	2.48%	(7.25%)
GOOGLE:	GOOG	526.86	7.32%	(11.3%)
HARMONIC:	HLIT	4.85	2.32%	(43.41%)
INTEL:	INTC	19.77	3.02%	(5.99%)
JDSU:	JDSU	11.19	13.26%	(22.72%)
LEVEL 3:	LVL	1.74	4.82%	77.55%
MICROSOFT:	MSFT	25.25	4.99%	(9.53%)
MOTOROLA MOBILITY:	MMI	37.72	(0.37%)	29.62%
RENTRAK:	RENT	14.16	22.39%	(53.05%)
SEACHANGE:	SEAC	7.44	6.90%	(12.98%)
SONY:	SNE	20.69	0.78%	(42.06%)
SPRINT NEXTEL:	S	3.25	(4.97%)	(23.17%)
THOMAS & BETTS:	TNB	40.81	6.83%	(15.51%)
TIVO:	TIVO	9.96	26.40%	15.41%
UNIVERSAL ELEC:	UEIC	19.37	8.76%	(31.72%)
VONAGE:	VG	3.28	15.49%	46.43%
YAHOO:	YHOO	12.74	(1.39%)	(23.39%)

TELCOS

AT&T:	T	29.04	3.75%	(1.16%)
VERIZON:	VZ	35.76	3.03%	(0.06%)

MARKET INDICES

DOW:	DJI	11284.54	4.32%	(2.53%)
NASDAQ:	IXIC	2479.85	5.89%	(6.52%)
S&P 500:	GSPC	1176.80	4.74%	(6.43%)

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. TIVO:	9.96	26.40%
2. RENTRAK:	14.16	22.39%
3. AOL:	14.43	17.89%
4. VONAGE:	3.28	15.49%
5. JDSU:	11.19	13.26%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. CLEARWIRE:	2.70	(10.3%)
2. ALCATEL LUCENT:	3.46	(6.49%)
3. ADVANTAGE:	2.14	(5.31%)
4. SPRINT NEXTEL:	3.25	(4.97%)
5. BIGBAND:	1.39	(4.79%)



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