

# CableFAX Daily™

Thursday — October 20, 2011

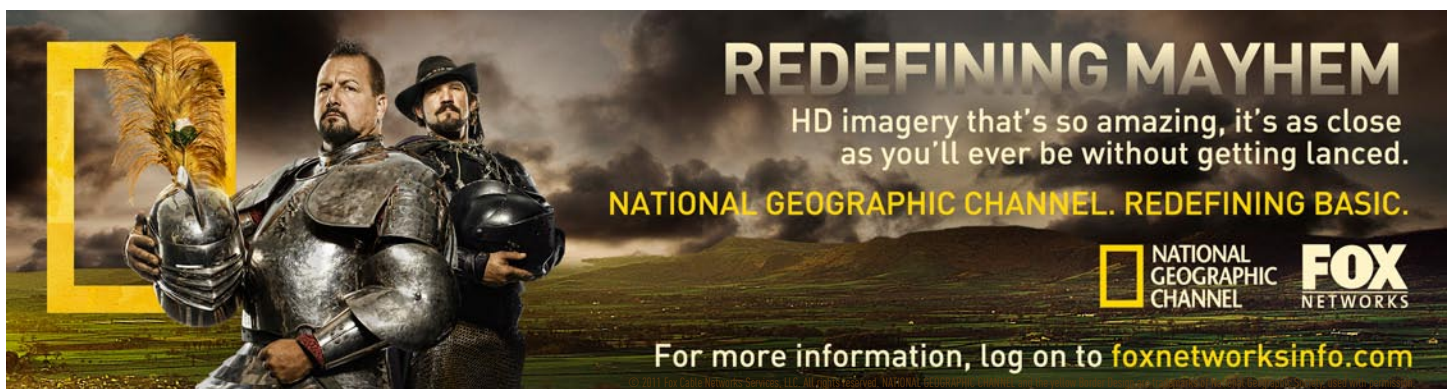
What the Industry Reads First

Volume 22 / No. 202

## An Uncertain Future: Digital Execs See Peril, Opportunity for Cable

Step outside the cable box for a moment, and you'll find some skeptics when it comes to authentication and the general jostling among media companies for over-the-top dominance. "You can't all be on top," said **Nagra** vp, business development *Robin Wilson*. "You can't all be in control." Panelists at **Digital Hollywood** in L.A. Wed said media companies must work out licensing and ratings issues for multiplatform—or simply get left behind. "There's a way to monetize that, and that's what we need to figure out," said *Dave Ulmer*, managing dir, new growth platforms at **SingTel**, calling cable's **iPad** apps too restrictive and a "half ass" way to give consumers access on multiple devices. But he said he's amused when media execs say they don't put certain content online, noting that he can find anything on underground sites within 15 seconds on his smartphone. Wilson predicted a "train wreck" for media companies if they don't stop trying to exert overly restrictive content controls. "They've got to get over this problem or else the world will pass them by," said Wilson. At one panel, when **Definition 6's** *Frank Radice* asked **NBCU's** *Pam Schechter* to predict whether thorny rights issues could doom the video content business to the fate suffered by the music industry after **Napster**, the vp, business affairs, digital and cable entertainment responded that "maybe a couple of years ago I would have said yes." But she said she has noticed a shift in thinking lately from both the content and distribution sides. "I think you're going to see over the next couple of years an effort to get the content out there rather than hold it back," she said. *Kate Neligan*, **Lionsgate** vp, on demand and digital marketing, said social gaming is one area that could help monetize online platforms and make it easier for content to flow freely. "There's a lot of experimenting going on right now," she said, noting that content companies can use games based on their content as a testing ground. "It's really a free focus group," she said. *Sean Bunner*, **HSN's** vp, new business development, said the net offers "the arcade" at its Website to increase engagement, often offering a prize to winners of basic games. "The most popular ones are usually the most simple," he said. Meanwhile, people can view the net's live video stream as they play and, of course, do a bit of home shopping while they're at it.

**In the Courts:** **Viacom** and **YouTube** were back in NY court Tues after Viacom made good on its promise to appeal last year's lower court decision absolving YouTube of copyright infringement because it's entitled to the **Digital Millennium Copyright Act's** "safe harbor" protection. VIA continues to argue the Google site willfully violated copyrights by allowing users to post TV content without authorization, while YouTube says it has always taken down any content causing concern. A 3-judge panel has yet to decide whether to revive the case. The dispute began way back in Mar '07.



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**OTT:** RadixTV unveiled Rtv, a streaming service at Radixtv.com delivering live programming from nets including **Bloomberg**, **MSNBC** and **CNBC** for \$14.99/month to US business customers in commercial and financial institutions. The company's co-founder, *Bhupender Kaul*, is a former *Time Warner Cable* exec. Its Website compares Rtv to cable and knocks cable's expensive programming bundles, mass market programming focus and geographic restrictions. -- **Roku** added **EWTN Global Catholic Net** to its offerings. -- **Amazon Prime** inked a licensing agreement with **PBS** for current and archived programming, bringing to more than 12K the number of titles it streams. -- **Apple's iTunes** store earned quarterly rev of nearly \$1.5bln and has delivered 650mln TV show downloads to date. -- **Netflix** released a new app supporting tablets running **Android 3.x** and allowing Canadian and Latin American consumers to stream content on Android smartphones and tablets.

**Carriage:** **Jewish Life TV** earned a 50% bump in distribution over the past 12 months and can now be seen in 33mln cable and satellite homes on ops including **Comcast**, **Time Warner Cable** and **DirectTV**. The net plans to launch an HD version next year. -- **Cablevision** added an African content category to iO TV's intl lineup that includes **Noire TV Africa** and **Afrotainment Plus**. Broadcast Basic subs can receive the new package for an additional \$6.95/month.

**Advertising:** **Comcast**, **Time Warner Cable** and **Cox** will soft launch local ad market platform **I+** Nov 1 with national representation by **NCC Media**. Slated to start cooking next year, the platform will allow NCC sellers and local cable reps to sell local ad time on **DirectTV**, **FiOS** and **U-verse** in several markets including L.A., Dallas, Houston and Atlanta. Markets will come online on a sequential basis, with spots to eventually become available on approx 30 nets such as **ESPN**, **FX**, **USA** and **TNT**. NCC said I+ adds 12mln additional homes to its insertable footprint across 46 markets. -- **CableLabs** has invited vendors and developers to help advance iTV advertising tied to the **SCTE-130** specs by providing the source code and dev tools for a new advanced ad toolset under a free community license.

**At the Portals:** The **FCC** launched an infographic meant to illustrate "the looming spectrum crunch whereby demand for spectrum is rapidly outstripping supply." See [fcc.gov/document/new-fcc-infographic-spec-it-out](http://fcc.gov/document/new-fcc-infographic-spec-it-out) for details.

**Technology:** A new partnership allows **IBBS** to offer **Clearleap's** Stream On Demand solution to its broadband provider clients and provides Clearleap with network management support from IBBS, enabling Clearleap to better serve ops using Stream On Demand.

**Ratings:** **Oxygen's** "Bachelorette Party: Las Vegas" garnered 814 total viewers, 575K 18-49s and 443K women 18-49 to become the net's best freshman docu-series premiere ever. -- Based on Nielsen Fast National data, **CNN's** Republican debate delivered 5.47mln P2+ and 1.65mln 25-54s Tues night.

**Programming:** **MSNBC** shuffles its prime schedule Oct 24, moving "The Last Word with Lawrence O'Donnell" back to 10pm as "The Ed Show" heads to 8pm. "The Rachel Maddow Show" will continue to air in the 9pm slot. -- **TLC's** 8-part series "All-American Muslim" (Nov 13) follows the daily lives of 5 American Muslim families in Dearborn, MI, to provide an intimate look at the religious community. -- MMA franchise **ProElite** inked a multi-fight, multi-year TV deal with **HDNet** that kicks off Nov 5. -- **GSN** picked up the 1st-ever cable rights to 90 eps

## 2011 Most Powerful Women in Cable

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### SAVE THE DATE | DEC. 9

CableFAX's Most Powerful Women in Cable Breakfast in NYC

# BUSINESS & FINANCE

of "Are You Smarter Than a Fifth Grader" (Nov 5).

**On the Circuit:** NAMIC Mid-Atlantic's set to honor Cox evp/ chief people officer *Mae Douglas* with its '11 Diversity Champion Award at a Nov 2 gala in D.C. Info at NAMIC.com. -- **CTHRA's** offering a educational event Nov 15 in L.A. covering the impact of social media in the workplace and trends in labor and employment law. For registration and more info go to CTHRA.com.

**People:** *Frances Manfredi* was elevated to pres, **NBCU Cable and New Media Distribution**. She will continue to oversee the company's product distribution to cable and new media platforms plus manage all of its non-theatrical distribution business. -- **GSN** tapped *Amy Introcaso-Davis* as evp, programming, effective Nov 1. -- *Anthony Dunaif* joined **HealthiNation** as svp, syndication and strategic partnerships.

Business/Finance: **Nomura** maintained its 'buy' rating on **Comcast** shares although it's "increasingly concerned over the developing trends in the Broadcast segment, even though the segment is very small." The MSO must navigate **NBC's** woes and deliver on investor expectations for capital returns to sustain its premium valuation relative to **Time Warner Cable**, said the firm.

## CableFAX Daily Stockwatch

Company	10/19 Close	1-Day Ch	Company	10/19 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
BROADCOM:	37.42	(0.74)	BROADCOM:	37.42	(0.74)
DIRECTV:	46.22	(0.46)	CISCO:	17.16	(0.35)
DISH:	25.60	(0.53)	CLEARWIRE:	1.39	(0.02)
DISNEY:	33.61	(0.33)	CONCURRENT:	4.65	(0.04)
GE:	16.52	(0.19)	CONVERGYS:	10.11	(0.24)
NEWS CORP:	16.90	(0.29)	CSG SYSTEMS:	13.76	(0.31)
<b>MSOS</b>					
CABLEVISION:	17.31	(0.23)	ECHOSTAR:	24.65	(0.52)
CHARTER:	48.78	(1.48)	GOOGLE:	580.70	(9.81)
COMCAST:	23.54	(0.24)	HARMONIC:	4.46	(0.23)
COMCAST SPCL:	23.24	(0.27)	INTEL:	24.24	0.84
GCI:	9.00	(0.7)	JDSU:	10.27	(0.49)
KNOLOGY:	13.65	(0.35)	LEVEL 3:	1.55	(0.1)
LIBERTY CAPITAL:	73.69	(2.56)	MICROSOFT:	27.13	(0.18)
LIBERTY GLOBAL:	39.88	(0.98)	MOTOROLA MOBILITY:	38.71	(0.21)
LIBERTY INT:	15.12	(0.24)	RENTRAK:	13.35	(0.72)
SHAW COMM:	20.70	(0.08)	SEACHANGE:	7.90	(0.19)
TIME WARNER CABLE:	69.09	0.10	SONY:	20.24	(0.55)
VIRGIN MEDIA:	26.74	(0.28)	SPRINT NEXTEL:	2.80	(0.08)
WASH POST:	339.12	(7.42)	THOMAS & BETTS:	43.66	(1.28)
<b>PROGRAMMING</b>					
AMC NETWORKS:	34.06	0.47	TIVO:	10.22	(0.21)
CBS:	23.33	(0.48)	UNIVERSAL ELEC:	18.62	(1.09)
CROWN:	1.47	(0.06)	VONAGE:	2.85	(0.06)
DISCOVERY:	41.07	(0.5)	YAHOO:	15.94	0.47
GRUPO TELEVISIA:	19.64	(0.5)	<b>TELCOS</b>		
HSN:	34.95	(0.52)	AT&T:	29.09	(0.12)
INTERACTIVE CORP:	40.89	(0.89)	VERIZON:	37.05	(0.19)
LIBERTY STARZ:	64.79	0.41	<b>MARKET INDICES</b>		
LIONSGATE:	7.01	(0.14)	DOW:	11502.62	(42.43)
LODGENET:	1.98	0.12	NASDAQ:	2604.04	(53.39)
NEW FRONTIER:	1.15	0.08	S&P 500:	1209.88	(15.5)
OUTDOOR:	6.65	(0.44)			
SCRIPPS INT:	40.54	(1)			
TIME WARNER:	33.45	(0.31)			
VALUEVISION:	2.98	(0.13)			
VIACOM:	51.22	(0.18)			
WWE:	10.04	(0.06)			
<b>TECHNOLOGY</b>					
ADVANTAGE:	2.10	(0.03)			
ALCATEL LUCENT:	2.58	(0.36)			
AMDOCS:	29.62	(0.31)			
AMPHENOL:	41.90	(2.2)			
AOL:	14.08	(0.27)			
APPLE:	398.62	(23.62)			
ARRIS GROUP:	10.98	(0.36)			
AVID TECH:	7.40	(0.45)			
BIGBAND:	2.24	(0.02)			

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## Think about that for a minute...

### Ahead Of Our Time

#### Commentary by Steve Effros

I wrote a column in April, 2005 entitled "Speaking Clearly." It was about, in part, a new remote control and navigation system based on voice recognition. The device was made by a company called AgileTV. The product was called "Promptu," and here's what I said about it, program guides, and a consumer interface back then:

"I have never seen a better execution of that interface than Promptu. You literally push a button and talk into the remote. Tell it clearly what you want, and boom, it goes and gets it for you. Awesome! If you want to scan all the sports on right now, just say, "scan sports" and the pictures start coming. If you want to find out when "West Wing" is on, just say "West Wing" and an upcoming programs list appears. Say "record" and it's set to go. It's the ultimate in consumer ease, convenience and effectiveness."



Steve Jobs wasn't the only visionary. Brian Roberts' company invested in the development of Promptu, so did Mike Willner's, among others. That Promptu didn't ultimately get out into the marketplace is not a real surprise. It required a whole lot of processing power, which was much more expensive then than it is now. To work well, without a delay on channel changes, it also required very fast two-way communication. We weren't quite ready. We were ahead of our time.

Fast forward to today. Picked up my new iPhone 4S last Friday. By now most of you have read the stories and reviews about this device. When it was introduced a few weeks ago there were loud laments that Apple had not rolled out a "new phone" to match, compete and beat the newest Android phones. What folks didn't understand until they had the new device in their hands and started playing with it was that it's no longer really a phone.

Apple moved, yet again, to define and capture a new market: portable "personal assistants." It's awesome.

"You just push a button and talk into it. Tell it clearly what you want, and boom, it goes and gets it for you!" The voice recognition is amazingly accurate. The integration with email, calendars, reminders, timers, and web search is not only "...the ultimate in consumer ease, convenience and effectiveness," it's just plain fun. It even has a sense of humor!

We now have the processing power and the WiFi, broadband and even cellular connections for two-way speed to do the processing at servers, delivering the results almost instantaneously, or at least fast enough to keep most folks happy. Four million of these devices were sold in one weekend.

While we may not have been able to take advantage of voice recognition and EPG processing in 2005, there's no reason we can't do it now. If I knew how, I'd be writing an App for cable box control rather than write this. Since that's not going to happen, I'll just suggest that someone should already be well on the way to delivering it. There's no reason, now, that a lot of folks can't get the benefit of this new navigation capability.

Clearly some cable companies and Microsoft have also figured this out. Xbox ads are now touting the capability to do voice navigation of your television set. So it may have taken six more years to finally get all the pieces in place, but now it's here, and we should all take advantage of it to the degree we can. Our customers will thank us for it.

*Steve*

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