

# CableFAX Daily™

Monday — October 30, 2006

What the Industry Reads First

Volume 17 / No. 210

## Fear's Web: Comcast Plays With Broadband This Halloween

**Comcast** keeps talking about its upcoming Internet plans, with *Brian Roberts* promising last week to roll out new 'Net products over the next 12 months. Exactly what's in the works is a mystery—though Roberts promised Comcast would touch on current trends like video and community. As we wait to see what's next, hacks got a sneak peak last week at one of the MSO's most extensive broadband properties to launch. **FearNet.com**, which debuts Tues, is the online component for Comcast-**Sony's** (and reportedly **Lions Gate's**) VOD horror channel. It features a jam-packed site including full-length feature downloads of movies, trailers, games, chat and an overall horror community. The site could help Comcast win carriage with other MSOs if it's able to attract enough of a national audience. Viral marketing is in the works, with quite a few mentions already popping up on horror blogs (although there seems to be some confusion among some horror buffs as to whether it's a new premium channel or a VOD offering). Like the VOD channel, FearNet.com is ad-supported and free to consumers. An interesting marketing component is the gory, opening screen—a stomach being split open to reveal the site's content. Plans are to allow advertisers to sponsor that bit. The Website will differentiate itself from the VOD channel, featuring more short-form content and fewer movies. -- Meanwhile, the long-promised **HorrorNet** (backed by **Dark Castle** and **Warner Bros**) continues to pursue launch plans. "We remain committed to developing the brand," CEO Kim Bangash said, though he didn't provide a timeframe. Does FearNet's debut hurt HorrorNet? "I think it helps," he said. "FearNet is a VOD service. It serves the interest of the cable operator. It's smart for them... but I think VOD service overall is anemic as a brand. Comcast doesn't need a brand, so it's fine for them." Bangash was a little more critical of FearNet on his HorrorNetwork.tv site, writing "lots on the horizon for the horror fan this month: Monsterfest on **AMC**; did I see that **Turner Classic** wants to copycat; the **Scream Awards** on Spike; the video-on-demand service, **Fear** (okay, that one is a little lame but we'll take what we can get)."

**Gemstar Changes:** **Gemstar-TV Guide** combined its **TV Guide On-Screen** and **TV Guide Interactive** divisions to form the North American TV Guide IPG entity. On-Screen pres *Tom Carson* was named pres of the new unit. Interactive gm, svp *Todd Walker* has decided to leave the company.

**Cable's Flush:** When we stumbled upon an **NCTA** trademarked doodle dubbed **Abel Cable**, we thought we'd discovered the cable group's next big PR push. What was this little guy—with his TV head and co-ax body—supposed to be? A cartoon character for PSAs about parental controls? Cable's new mascot? A new line of stuffed animals for the kiddies? Turns out the NCTA staff just got a little artsy when decorating their new DC digs. **Abel** has a mate called **Mabel**, and the 2 are serving as male and female icons on the new restroom's doors. "The creative was a group effort led by NCTA staff and then turned over to a professional for fine-tuning," we're told (guess that explains the trademark). No word on whether NAB is working on rival male and female antennae icons for their restrooms.



**GREG THE BUNNY REVEALED: The Webisodes**  
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**In the States:** **DirectTV** will pay Missouri \$50K for violating the state's No Call list, MO Attorney General *Jay Nixon* announced. -- **Time Warner** gen counsel *Paul Cappuccio* (he's the guy who successfully argued cable's Brand X case before the US Supreme Court last year) should be sticking around awhile. Time Warner granted him 250K restricted stock unit for retaining his services over the next 4 years, according to an **SEC** filing.

**In the Courts:** **Adelphia** filed today in US Bankruptcy Court in NY a notice divulging that certain documents filed under seal have been declassified and made publicly available at [www.adelphiarestructuring.com](http://www.adelphiarestructuring.com). The documents relate to an Aug '05 "resolution process" ordered by the court and were declassified pursuant to a Sept 19 court decision.

**VOD:** **In Demand** and the **NBA** announced the addition of a multi-screen mosaic to the "NBA League Pass" sports package. The package's 1st channel will include up to 8 rotating games while providing score and clock information. A free, 1-week preview of the package will be available beginning Tues, as will a special season rate of \$179. -- **TVG's** Breeders' Cup World Championship preview show "The Works" is available on demand for the 1st time through **TV Guide Spot** on **Cablevision** and **Insight** systems. Airing through Thurs and providing in-depth looks at contending horses, the 1-hour show will also be available on select **Cox** systems.

**IPTV:** **Skype** co-founder *Janus Friis* told a Danish newspaper about his plans to launch an ad-supported IPTV project, dubbed "Venice," according to *Reuters*. It will offer broadband users free TV programs and is expected to make its market debut before the year is out. -- IPTV service provider **Brightcove** inked a deal with **Warner Music** to provide on demand access to WM's catalog of music video content, including artist interviews and live performances. Brightcove's Web-based video players may be customized by artist and record label. -- **Auroras Ent** has entered into digitization and transport pacts with **Starz**, **Fox News** and **Playboy TV**, bringing its IPTV lineup to more than 160 channels. The company expects a full launch early next year.

**Programming:** *Bono* and *The Edge* of *U2* will be featured during the Nov 24 (11pm) preview of **HBO's** new series "Off the Record." The show, to be hosted by Eurythmics front man *Dave Stewart*, will offer beginning in Jan intimate conversations with music stars from multiple genres.

**On the Circuit:** **NAMIC** is now accepting submissions for its '07 "Vision Awards," honoring cable networks that produce quality, multi-ethnic and cross-cultural original programming content. The awards, to be presented March 27 in Beverly Hills, recognize 15 categories, from comedy to reality. Submissions are due by Nov 15.

**Business/Finance:** **Cablevision** elected 2 new members to its board: *Grover Brown* and *Zachary Carter*, bringing the total number of members to 16. Brown is with the law firm **Gordon, Fournaris & Mammarella**. Carter is a partner at **Dorsey & Whitney**. -- The **Time Warner** board declared Fri a regular quarterly dividend of 5.5 cents/share on its common stock, payable Dec 15 in cash to stockholders of record at the close of business on Nov 30. -- **Scripps** declared a quarterly dividend of 12 cents/share, payable Dec 8 to shareholders of record at the close of business Nov 24. -- **CommScope's** 3Q rev jumped 35% to \$466mln, while its operating income surged 100% to \$68mln. **FBR** maintained its "outperform" rating on the stock, although it reduced its 4Q and '07 estimates "to reflect a more conservative unit growth scenario and lower operating margins." Shares of CommScope closed Fri down 8.5% at \$32.13.



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**CableFAX Week in Review**

Company	Ticker	10/27 Close	1-Week % Chg	YTD %Chg
<b>BROADCASTERS/DBS/MMDS</b>				
BRITISH SKY:	BSY	41.14	(1.9%)	22.00%
DIRECTV:	DTV	21.91	2.80%	55.20%
DISNEY:	DIS	31.73	0.90%	32.40%
ECHOSTAR:	DISH	35.39	4.30%	30.20%
GE:	GE	35.21	(0.7%)	7.60%
HEARST-ARGYLE:	HTV	25.29	7.40%	11.00%
ION MEDIA:	ION	0.78	(15.2%)	
NEWS CORP:	NWS	21.71	(0.2%)	32.20%
TRIBUNE:	TRB	33.47	3.60%	15.40%

Company	Ticker	10/27 Close	1-Week % Chg	YTD %Chg
<b>MSOS</b>				
CABLEVISION:	CVC	27.74	(0.7%)	18.20%
CHARTER:	CHTR	2.29	23.80%	87.70%
COMCAST:	CMCSA	40.02	5.40%	54.40%
COMCAST SPCL:	CMCSK	39.97	5.50%	55.60%
GCI:	GNCMA	12.89	(0.5%)	24.80%
KNOLOGY:	KNOL	10.92	1.20%	184.40%
LIBERTY CAPITAL:	LCAPA	87.33	(0.4%)	10.20%
LIBERTY GLOBAL:	LBTYA	26.24	1.40%	16.60%
LIBERTY INTERACTIVE:	LINTA	22.20	0.90%	15.30%
MEDIACOM:	MCCC	8.30	7.50%	51.20%
NTL:	NTLI	27.23	2.60%	14.70%
ROGERS COMM:	RG	56.98	5.10%	35.50%
SHAW COMM:	SJR	31.19	5.60%	53.40%
TIME WARNER:	TWX	19.91	0.70%	16.90%
WASH POST:	WPO	751.75	1.70%	0.80%

Company	Ticker	10/27 Close	1-Week % Chg	YTD %Chg
<b>PROGRAMMING</b>				
CBS:	CBS	28.97	3.70%	14.50%
CROWN:	CRWN	4.03	1.00%	(56.1%)
DISCOVERY:	DISCA	14.86	(1.3%)	1.60%
EW SCRIPPS:	SSP	49.30	0.70%	4.90%
GRUPO TELEVISIA:	TV	24.95	6.00%	24.00%
INTERACTIVE CORP:	IACI	30.10	0.90%	6.40%
LODGENET:	LNET	22.31	16.20%	60.00%
NEW FRONTIER:	NOOF	9.13	2.20%	39.80%
OUTDOOR:	OUTD	13.63	4.00%	1.00%
PLAYBOY:	PLA	10.67	2.40%	(23.2%)
UNIVISION:	UVN	35.01	0.00%	19.10%
VALUEVISION:	VVTV	12.79	3.80%	1.50%
VIACOM:	VIA	39.93	4.50%	(7.4%)
WWE:	WWE	16.75	(2.6%)	27.20%

Company	Ticker	10/27 Close	1-Week % Chg	YTD %Chg
<b>TECHNOLOGY</b>				
3COM:	COMS	4.90	4.90%	36.10%
ADC:	ADCT	14.09	(4.7%)	(13.9%)
ADVANTAGE:	AEY	4.08	(10.3%)	(33.7%)
AMDOCS:	DOX	39.59	(1.2%)	17.80%
AMPHENOL:	APH	68.83	2.00%	56.20%
ARRIS GROUP:	ARRS	13.44	5.80%	41.90%
AVID TECH:	AVID	36.17	(8.6%)	(1.9%)
BLNDER TONGUE:	BDR	1.31	0.80%	(32.8%)
BROADCOM:	BRCM	29.19	6.10%	(7.1%)
C-COR:	CCBL	9.86	2.80%	102.90%
CISCO:	CSCO	23.73	(3.3%)	38.60%
COMMSCOPE:	CTV	32.13	(5.4%)	59.60%
CONCURRENT:	CCUR	1.93	10.30%	2.10%

Company	Ticker	10/27 Close	1-Week % Chg	YTD %Chg
CONVERGYS:	CVG	21.11	0.70%	33.20%
CSG SYSTEMS:	CSGS	27.09	(3.2%)	21.40%
GEMSTAR TVG:	GMST	3.46	3.90%	32.60%
GOOGLE:	GOOG	475.27	3.40%	7.90%
HARMONIC:	HLIT	8.13	6.10%	67.60%
JDSU:	JDSU	15.06		
LEVEL 3:	LVLT	5.19	(11%)	80.80%
LUCENT:	LU	2.44	3.80%	(8.3%)
MICROSOFT:	MSFT	28.34	(0.3%)	13.90%
MOTOROLA:	MOT	23.17	(1.9%)	4.30%
NDS:	NNDS	46.10	2.80%	12.00%
NORTEL:	NT	2.17	(1.8%)	(29.1%)
OPENTV:	OPTV	2.78	(3.5%)	24.10%
PHILIPS:	PHG	35.19	0.80%	16.60%
RENTRAK:	RENT	12.77	4.80%	19.30%
SEACHANGE:	SEAC	8.51	(1.3%)	7.70%
SONY:	SNE	41.46	3.40%	2.40%
SPRINT NEXTEL:	S	19.17	11.40%	(9.5%)
THOMAS & BETTS:	TNB	51.93	1.90%	22.20%
TIVO:	TIVO	6.46	(1.7%)	26.20%
TOLLGRADE:	TLGD	8.69	(4.6%)	(20.5%)
UNIVERSAL ELEC:	UEIC	21.38	1.30%	20.50%
VONAGE:	VG	7.32	(2.1%)	(38.9%)
VYYO:	VYYO	3.85	(1.8%)	(28.2%)
WEBB SYS:	WEBB	0.06	20.00%	(25%)
WORLDGATE:	WGAT	1.20	(12.4%)	(41.7%)
YAHOO:	YHOO	25.34	9.20%	(23.2%)

Company	Ticker	10/27 Close	1-Week % Chg	YTD %Chg
<b>TELCOS</b>				
AT&T:	T	34.22	(0.7%)	50.60%
BELLSOUTH:	BLS	45.04	(0.5%)	76.90%
QWEST:	Q	8.74	6.20%	54.70%
VERIZON:	VZ	38.84	2.80%	38.50%

Index	Value	% Chg	% Chg
<b>MARKET INDICES</b>			
DOW:	12090.26	0.70%	12.80%
NASDAQ:	2350.62	0.40%	6.60%

**WINNERS & LOSERS**

**THIS WEEK'S STOCK PRICE WINNERS**

COMPANY	CLOSE	1-WK CH
1. CHARTER:	2.29	23.80%
2. WEBB SYS:	0.06	20.00%
3. LODGENET:	22.31	16.20%
4. SPRINT NEXTEL:	19.17	11.40%
5. CONCURRENT:	1.93	10.30%

**THIS WEEK'S STOCK PRICE LOSERS**

COMPANY	CLOSE	1-WK CH
1. WORLDGATE:	1.20	(12.4%)
2. LEVEL 3:	5.19	(11%)
3. ADVANTAGE:	4.08	(10.3%)
4. AVID TECH:	36.17	(8.6%)
5. COMMSCOPE:	32.13	(5.4%)

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# MaxFAX...

## Vote Early, Vote Often ...

Oh, I know; the election is still over a week away. (For those of you who might have been relaxing—or hiding—under a rock somewhere, the American general election for the



**Paul S. Maxwell**

House of Representatives and a third of the Senate is Tuesday, Nov 7, plus lots of local and/or state issues).

But it seems that, in many pre-cincts, about half

the votes will be cast via absentee and/or “early” balloting. All of which might be a nice way to nudge a few more lazy Americans to actually cast a ballot, but it does take away a little bit of the excitement of going to physically cast those votes in person (and having your driver’s license picture laughed at).

Looking for information on candidates unique to my precinct in the mountains of Colorado, I came across a new, semi-official checklist issued by one unnamed political party for those lucky enough to survive the 7th and become newly elected Congresspersons. Among the things to do: (1) rehearse denials until they become second nature; (2) hire a lawyer or four; (3) get an extortion

adviser and/or experienced—very experienced—CPA; (4) erase all frowns, smile until it is like rictus; (5) plan ahead for a choice of federal penitentiaries; and (6) see #s one and four, repeat as needed.

(By the way, for a really close look at how cable—as well as other platform providers—might fare in these elections as well as an in-depth look at **C-SPAN**, be sure to take a look at **The BRIDGE** that comes out tomorrow ... appropriately, on Halloween).

## Random Notes:

• **Intern w/CTAM?**... of the Rockies, that is. Cool local **CTAM** program ... it is a Cable Apprentice-like competition. Registration is due Mon for graduate students to compete for a chance at a paid internship at **Comcast**, **Time Warner Cable**, **STARZ!** and **Sand Cherry Associates**. A team competition not unlike the tacky Trump show on **NBC**, this one carries a nice prize of \$1,500 plus the internship for the winning students... cool. For info: dhorton@sandcherryassociates.com or 720.937.8978. Might not be too late!

• **BeachTAM:** Ah, busy CTAM chapters. While I’m in the Miami area at the *CableFAX* Leaders’ Retreat later this week, CTAM Florida, **WICT** South Florida and the **FCTA** are sponsoring BeachTAM at the Marriott in West Palm Beach... cool auction including ski tickets to ski

with **Cox’s Joe Rooney** at Ski-TAM this year (I thought he was going to pay me for lessons?). It’s on the 2nd this week. And sounds like fun.

• **Speaking of:** The *CableFAX* Leaders’ Retreat at the Ritz-Carlton, South Beach, FL, starts this Wed afternoon with the NCTA’s *Kyle McSarrow* talking with a few dozen senior cable executives in our regular off-the-record annual confab. That will be followed by (1) people gazing on South Beach; (2) a really interesting—and quite different—look at how a telephone company might go through the exercise of gathering competitive information to attack an incumbent cable operator as presented by **CentrisBRIDGE** execs Professor *Paul Rappoport* of Temple U. and Ms. *Pinna Gallant* of **MBC** with, naturally, a how best cable might answer the challenge; (3) a look at how each of the extant platform providers use bandwidth today—and a sneak look at tomorrow—by **IMA’s Pete Smith**; (4) a panel Friday morning with **Insight’s Michael Willner** and a surprise guest or two; and (5) chill a bit.

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# CableFAX *Leaders Retreat*

**4<sup>th</sup> Annual Off-The-Record Gathering for Cable's Leaders**  
November 1-3, 2006 - Ritz-Carlton South Beach, Miami

**Confirmed Attendees (as of 10/19/06):**

Atlantic Broadband – CEO, President & COO  
 Audible Magic – Business Development  
 Balfour Associates Inc. – Chairman  
 Bend Cable Communications LLC - President & CEO  
 Bresnan Communications, Inc – EVP Operations  
 Buford Media Group, LLC – CEO, President & COO  
 C-SPAN – VP Affiliate Relations  
 Cequel III -Suddenlink – President & CEO, SVP Programming  
 Comcast Cable – EVP  
 Cox Communications – SVP Marketing  
 Effros Communications – President  
 Fleischman & Walsh LLP – Partner  
 Fox Cable Networks – SVP Affiliate Marketing, SVP Sales  
 Harron Communications – Chairman /CEO & President /COO  
 HSN/IAC – EVP Affiliate Relations  
 ION Media Networks – President, Cable Distribution  
 Insight – CEO, VP Programming  
 IMA-Int'l Media Advisors – Principal  
 Mediacom – SVP Programming & Human Resources  
 Media Business Corp. – Sr. VP, Product Marketing  
 Millennium Digital Media – SVP, Programming & Product Development  
 NCTC – President & CEO, SVP Programming  
 NCTA – President & CEO  
 NBC Universal Cable – SVP Marketing  
 New Frontier Media – President, VP New Business  
 New Wave Communications – President  
 NFL Network – SVP  
 October Strategies, Inc. – Partner  
 SCTE – President & CEO  
 The Tennis Channel – SVP Distribution, VP Distribution  
 Time Warner Cable – EVP of Programming  
 Wave Broadband – CEO  
 WindBreak Cable – President & CEO

**Schedule of Events**

**Wednesday, November 1<sup>st</sup>**  
 12:00pm – 3:00pm - Registration  
 3:00pm – 5:00pm - Industry Leaders Forum with  
 Kyle McSillarow – President & CEO, NCTA  
 7:00pm – 10:00pm - Dinner at Vizcaya

**Thursday, November 2<sup>nd</sup>**  
 8:00am – 11:30am - Industry Leaders Forum  
 Breakfast  
 12:00pm – 4:30pm - Golf, Spa, Tennis or  
 Everglades  
 7:00pm – 10:00pm - Dinner

**Friday, November 3<sup>rd</sup>**  
 8:00am – 11:00am - Industry Leaders Forum  
 Breakfast With Michael Willner – CEO, Insight

**Sponsorship  
and Attendance  
Information**

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Thursday, November 2nd

The Colony in Palm Beach



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Panels with Florida's Top Decision Makers and Industry Leading Speakers all lead up to our CMO Deep Dive featuring **Joe Rooney** of Cox, **Matt Bond** of Comcast and **Steve Stiger** of Bright House. We'll top off the day with a BeachTam first... a Live & Silent "Human" Auction over cocktails!

**Register today at: [www.beachtam.com](http://www.beachtam.com)**

Come prepared to bid on your favorite industry personalities!

Some items on the auction block this year are:

- Joe Rooney - SkiTAM invitation - Lift Tickets to ski with Joe, and comp registration
- Kevin Hyman - Tampa Bay Lightning Hockey Game - the Full Box Seat experience
  - Doug McMillan - Jax Jaguars Game - VIP Seats
  - Jim Carey - Dinner
- Mike Giampietro - College Ball Game and Dinner
- KC McWilliams - An FSU Football Game complete with tailgating
  - David Lucoff - Miami Heat Game