

CableFAX Daily™

Monday — November 19, 2007

What the Industry Reads First

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Campaign Money: Donations Up For '08 Federal Elections

Cable and others have substantially increased their giving toward federal elections since the '04 election, the nonpartisan **Center for Responsive Politics** found. The TV/Movies/Music industry, which counts **Comcast** as the top donor, has increased donations from individuals and PACs 68% since '04 to more than \$14mln for the '08 election cycle, the Center said. The contributions compared were generally made during the first 9 months of '07 and '03. 77% of the entertainment industry's \$14mln went to Dems, while 23% went to Republicans. Cable's in good company. On average, the top-giving industries and interests increased their total contributions for Congressional and presidential candidates, as well as national party committees, by 46% since the same point 4 years ago. The securities and investment industry (private equity firms, hedge funds, etc) has increased its giving the most, 91% to nearly \$50mln. Industries with the smallest increases, or even declines, have GOP-leaning track records, the Center said. For example, the automotive industry has decreased its contributions 20%. The entertainment industry ranks 8th in terms of contributions for the '08 election, with top contributor Comcast giving more than \$1mln (65% to Dems, 35% to Republicans). **Time Warner** is 2nd in contributions, with more than \$731K (81% Dems, 19% Repubs). **NCTA** ranked 4th with nearly \$486K (54% Dem, 46% GOP). The Center notes that in many cases the organizations didn't donate, but rather the money came from the organization's PAC, individual members, employees, or those individuals' immediate families.

WICT Gala: To say *Lynn Yaeger* doesn't seek the spotlight would be an understatement. But anyone who saw her receive **WICT's** Woman of the Year award Thurs night knows she's capable of handling the attention just fine—she just chooses, as is fitting with her job, to let others bask in the limelight. Now that she's retiring as evp, corporate affairs for **Time Warner Cable**, who knows what's next. Maybe the former assistant to *Hubert Humphrey* will take up the political baton and spotlight herself? The annual WICT fundraising dinner also served as an industry farewell to **Oxygen's** *Gerry Laybourne*, who will be stepping down as **NBCU** purchases her media company. Laybourne, who accepted Oxygen's Best Programmer in Cable award, spoke about how "humbling—as much of Oxygen's career was humbling—" it was not to appear on WICT's first list of top companies for women 5 years ago. After profusely thanking her team, she told the industry's women that she'll "be watching you all. I'm going to be applauding you all." She offered proof of her commitment to women earlier in the evening when she jumped up, unprompted, to escort *Kim Martin* of rival women's net **WE** to the stage to accept the award for WE's emotional documentary on Vietnam nurses. Woman to Watch *Wonya Lucas*, of **Weather Channel**, was—as best described by her co-workers—a "rainbow." Kudos also to **Cox** (Best Operator for Women) and **TNT's** "The Closer" (Tribute Accolade winner). By the way, did everyone get that *Star Jones* is a lawyer? OK. Just making sure.

70/70: **AT&T** attacked **NCTA's** assertion that the so-called 70/70 test hasn't been met, saying the cable trade group



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relies entirely on 3rd party estimates of cable subscribership and penetration. "It is troubling in any context when those who are in sole possession of, and could readily provide the actual facts on the ground, choose to withhold them and rely instead on 3rd party estimates of those facts," the telco told the FCC in a letter Fri. AT&T wants the FCC to independently assess the facts. AT&T, then **SBC**, has previously said the Commission could "reasonably conclude that the 70/70 threshold has been met." **Verizon** recently weighed in on 70/70 during FCC meetings, though its comments were terser. "We reiterated that whether or not that threshold has been met, the Commission should continue to pursue policies that encourage video competition and should not burden new entrants with regulatory obligations that undermine video competition and broadband investment," Verizon said.

Badgering for Answers: Constituents' complaints over cable's ongoing feud with **Big Ten Net** has led 3 WI state reps to formally request an audit of the revenues and expenditures of **UW-Madison's** athletics department by a state cmte. The goal is to determine the nature and financial aspects of the university's agreement with the net—which applies to all conference schools—and to determine "whether any of these funds could be used to provide disenfranchised Wisconsin citizens with access to televised coverage of Badger sporting events through alternative means." The primary impetus to the request, said *Rep David Travis*, was the recent airing on Big Ten Net of the UW/Ohio St football game, which many fans couldn't receive through **Charter** or **Time Warner Cable**. The net didn't reply to requests for comment by deadline.

Day Off: Approx 50 **Comcast** technicians in Chicago staged a 1-day walkout Thurs to protest an ongoing labor dispute. The former collective bargaining agreement between the MSO and the local chapter of the **International Brotherhood of Electrical Workers** expired May 31, and the sides have yet to ink a renewal. Comcast rep *Rich Ruggiero* said Comcast met in good faith with union reps on Thurs and that no customers were affected by the walkout. The West Courtland St office houses just 3% of Comcast's area tech force, he said.

Competition: We all know that **DirectTV** believes their HD offerings to be "out of this world," and now the satcaster hopes to make the phrase literal. It has offered to give the **International Space Station** an HD makeover replete with an HD DVR, national high-def channels, a flat-screen HDTV and a Velcro-wrapped remote control. -- **AT&T** completed its purchase of **Dobson Comm**, a provider of wireless services under the **Cellular One** brand to nearly 1.7mln subs.

Mobile: It's no longer rumor, according to the *WSJ*: **Google** is preparing to bid at least \$4.6bln for wireless spectrum during Jan's FCC auction, and the company may also purchase a wireless carrier or WiMAX network provider **Clearwire**.

On Demand: The holidays really must be just around the corner as we just got word that **HSN** officially launched HSN on Demand service for **Cox** digital subs in Las Vegas and San Diego on Fri. The new service has been in trials for a few weeks. Smaller systems *Buckeye CableSystem* and *Service Electric* launched HSN on Demand in June.

On The Circuit: It seemed entirely appropriate that **CSTV** followed the **WICT** Gala Thurs night in DC with a Fri-morning breakfast there saluting its latest women in sports trailblazers honorees. CSTV's connection to WICT was WICT chief/two-time Olympian *Benita Fitzgerald Mosley*, who introduced honoree *Sheila Johnson*. A **BET** co-founder, Johnson's sports cred is she's the only woman to own parts of 3 sports franchises (the Wizards, Capitals and Mystics). With WICT's emphasis on pioneering women, few in sports broadcasting can compare with honoree *Lesley Visser*, whose career started more than 30 years ago when most press boxes included a sign: "No women or children allowed."

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CableFAX Week in Review

Company	Ticker	11/16 Close	1-Week % Chg	YTD %Chg
BROADCASTERS/DBS/MMDS				
BRITISH SKY:	BSY	51.38	6.60%	32.50%
DIRECTV:	DTV	23.87	(10.9%)	(4.3%)
DISNEY:	DIS	32.53	(0.6%)	(2.4%)
ECHOSTAR:	DISH	39.83	(17.9%)	4.70%
GE:	GE	38.65	0.70%	11.40%
HEARST-ARGYLE:	HTV	20.73	(2.3%)	(15.7%)
ION MEDIA:	ION	1.35	(2.2%)	170.00%
NEWS CORP:	NWS	21.76	(1.7%)	(1.1%)
TRIBUNE:	TRB	30.02	10.40%	(1.3%)

Company	Ticker	11/16 Close	1-Week % Chg	YTD %Chg
MSOS				
CABLEVISION:	CVC	26.30	0.10%	(7.7%)
CHARTER:	CHTR	1.26	10.50%	(58.8%)
COMCAST:	CMCSA	19.89	2.60%	(29.5%)
COMCAST SPCL:	CMCSK	19.72	2.60%	(29.4%)
GCI:	GNCMA	9.46	5.00%	(39.9%)
KNOLOGY:	KNOL	13.63	(6.6%)	28.10%
LIBERTY CAPITAL:	LCAPA	116.19	(3.4%)	18.60%
LIBERTY GLOBAL:	LBTYA	36.47		25.10%
LIBERTY INTERACTIVE:	LINTA	20.05	1.30%	(7%)
MEDIACOM:	MCCC	4.31	(12.2%)	(46.4%)
NTL:	NTLI	28.22		(54.5%)
ROGERS COMM:	RG	42.97		45.10%
SHAW COMM:	SJR	24.70	(9.4%)	63.90%
TIME WARNER CABLE:	TWC	25.74	1.90%	(32.8%)
WASH POST:	WPO	809.22	(1.7%)	11.00%

Company	Ticker	11/16 Close	1-Week % Chg	YTD %Chg
PROGRAMMING				
CBS:	CBS	27.18	1.60%	(6.9%)
CROWN:	CRWN	7.23	3.60%	99.20%
DISCOVERY:	DISCA	23.25	(8.4%)	44.50%
EW SCRIPPS:	SSP	44.87	3.40%	(8%)
GRUPO TELEVISIVA:	TV	24.10	7.80%	(3.4%)
INTERACTIVE CORP:	IACI	28.39	(3.3%)	(23.6%)
LODGENET:	LNET	18.42	(4.8%)	(26.4%)
NEW FRONTIER:	NOOF	5.00	(9.7%)	(21.1%)
OUTDOOR:	OUTD	7.32	(0.5%)	(42.9%)
PLAYBOY:	PLA	9.74	(6.7%)	(15%)
TIME WARNER:	TWX	17.30	0.30%	(18.6%)
UNIVISION:	UVN	36.23		2.30%
VALUEVISION:	VVTV	4.95	9.00%	(62.3%)
VIACOM:	VIA	41.52	4.20%	1.20%
WWE:	WWE	15.24	2.40%	9.70%

Company	Ticker	11/16 Close	1-Week % Chg	YTD %Chg
TECHNOLOGY				
3COM:	COMS	4.71	(0.6%)	14.60%
ADC:	ADCT	16.36	(5.7%)	12.50%
ADVANTAGE:	AEY	5.98	(5.4%)	114.30%
ALCATEL LUCENT:	ALU	8.12	(1.1%)	(32.6%)
AMDOCS:	DOX	32.30	(2.2%)	(16.6%)
AMPHENOL:	APH	41.62	1.50%	34.60%
APPLE:	AAPL	166.39	0.60%	84.20%
ARRIS GROUP:	ARRS	10.39	(0.3%)	(16.9%)
AVID TECH:	AVID	27.27	6.40%	(26.8%)
BIGBAND:	BBND	5.99	1.40%	(43.9%)
BLNDER TONGUE:	BDR	1.66	50.90%	(2.4%)
BROADCOM:	BRCM	28.47	(8.1%)	(11.9%)

Company	Ticker	11/16 Close	1-Week % Chg	YTD %Chg
C-COR:	CCBL	11.89	2.40%	6.70%
CISCO:	CSCO	29.94	4.80%	9.50%
COMMSCOPE:	CTV	40.37	(2.4%)	32.40%
CONCURRENT:	CCUR	1.01	(1%)	(44.2%)
CONVERGYS:	CVG	17.10	(2%)	(28.1%)
CSG SYSTEMS:	CSGS	17.52	(7.1%)	(34.5%)
GEMSTAR TVG:	GMST	5.70	(13.9%)	42.10%
GOOGLE:	GOOG	633.63	(4.6%)	37.60%
HARMONIC:	HLIT	10.78	(4.1%)	48.30%
JDSU:	JDSU	13.32	2.50%	(19.7%)
LEVEL 3:	LVL	3.19	9.60%	(43%)
MICROSOFT:	MSFT	34.09	1.10%	17.20%
MOTOROLA:	MOT	16.61	0.80%	(16.5%)
NDS:	NNDS	56.62	1.10%	17.30%
NORTEL:	NT	18.51	3.60%	(30.8%)
OPENTV:	OPTV	1.04	(6.3%)	(55.2%)
PHILIPS:	PHG	41.40	(2.4%)	14.40%
RENTRAK:	RENT	14.52	(1%)	(6.3%)
SEACHANGE:	SEAC	5.42	6.30%	(47%)
SONY:	SNE	48.23	2.60%	13.80%
SPRINT NEXTEL:	S	15.46	(5.2%)	(16.9%)
THOMAS & BETTS:	TNB	51.41	(1.1%)	8.70%
TIVO:	TIVO	6.51	(3.7%)	27.10%
TOLLGRADE:	TLGD	7.84	(5.7%)	(25.8%)
UNIVERSAL ELEC:	UEIC	33.56	0.20%	59.70%
VONAGE:	VG	2.27	0.40%	(67.3%)
VYYO:	VYYO	4.66	(16.8%)	2.90%
WEBB SYS:	WEBB	0.07		75.00%
YAHOO:	YHOO	26.82	4.00%	5.00%

Company	Ticker	11/16 Close	1-Week % Chg	YTD %Chg
TELCOS				
AT&T:	T	39.55	0.90%	21.70%
QWEST:	Q	6.67	4.50%	(20.3%)
VERIZON:	VZ	43.69	2.20%	29.10%

Index	Value	1-Week % Chg	YTD %Chg	
MARKET INDICES				
DOW:	INDU	13176.79	1.00%	5.70%
NASDAQ:	COMPX	2637.24	0.40%	9.20%

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. BLNDER TONGUE:	1.66	50.90%
2. CHARTER:	1.26	10.50%
3. TRIBUNE:	30.02	10.40%
4. LEVEL 3:	3.19	9.60%
5. VALUEVISION:	4.95	9.00%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. ECHOSTAR:	39.83	(17.9%)
2. VYYO:	4.66	(16.8%)
3. GEMSTAR TVG:	5.70	(13.9%)
4. MEDIACOM:	4.31	(12.2%)
5. DIRECTV:	23.87	(10.9%)

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Happy Thanksgiving?

Of course.

We've got oodles and oodles of stuff for which to be thankful!

Thanks to **Federal Confusion Commission** Chairman *Kevin Martin*(et), we've got our own government-instigated "war on cable" to openly fight now. Who knew *The New York Times* could again be government public relations spear-carrier? (Ah, I'd thought that ended when



Paul S. Maxwell

Judith Miller left.) This war now joins the wars on drugs, terror, obesity and other DC campaigns as a focal point of our government's efforts to make us safe from bad television channels proliferating without restraint.

But wait! We've also got retrans consent... so thanks again to the government! Maybe we'll get really lucky and get multicast must carry, too!

So, extra special thanks to Martin(et) for renewing the "communications lawyers full employment act." Let's see just how we can all parse the latest cable acts from 1992 (overriding #41's veto) and the 1996 telecom version... not to mention getting all of those copiers singing out the 1984 Cable Act for some revisionist history. Clearly, be thankful these guys can't

count... at least not up to 70/70.

Thanks to the Republican Administration (and the Republican Congress before it and the current Republican Courts and the Republican-dominated FCC) for not acting like Republicans might have been expected to behave. What ever happened to judicial restraint? Whatever happened to deregulation? Whatever happened to fiscal restraint?

Meanwhile real thanks to the Presidential campaign skirmishing generating lots and lots of cable ads and lots and lots and lots of hot air. (It ain't all bad, you know.)

Thanks for the upcoming Olympics in Beijing on **NBC Universal** et al coming in '08 to help drive local ad sales.

Thanks to the **FTC** and the FCC and the **Justice Dept** for beginning the redefinition of a subscription-driven market at they limp toward a resolution allowing the DARS merger of **Sirius** and **XM**. That'll make speculation run wild and keep a whole platoon of analysts busy for months!

Thanks to all those lending the sorely needed helping hands to those poor, under-capitalized, put-upon telephone companies—**Verizon** and **AT&T**— as they struggle mightily uphill against the incumbent cable operators. Oh, that *Sisyphus* might have had that kind of selfless help!

Thanks to all of the day traders and investment houses for proving that

herds chase fads, and nothing makes any sense anyway... especially making decisions based solely on quarterly earnings reports.

Never mind. Have a Happy Thanksgiving anyway. Cable can. Meanwhile, I'm in Santa Fe... eating lots and lots.

Random Notes:

- **whereishd.com**: Take a look. In beta now... site (plus a couple of hundred other URLs that go there) will allow you to compare the HD offerings of every platform provider in your zip code. It is in beta, so it might have a glitch or two... take a look and then let us know (you can click on the bottom of the comparison page to email us).

- **Nice WICT**: Will be interesting to watch as all of cable's membership groups, eleemosynary associations and others figure out how to maintain during twice annual (bi-annual? Semi-annual?) meeting sessions. Bet **WICT** will want to keep us all in tuxes... that server-look aspect resonates. Special kudos go to *Wonya Lucas* (cool daughters, she's got and one fine "momma" and one of the best "thanks" responses I've ever heard) and my old friend *Lynn Yaeger* for special thanks to the (nice, big) crowd.

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