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What the Industry Reads First

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Sounding the Alarm: DISH Dumps Some More on Charter-TWC-BH Deal

DISH wrote to the FCC Mon to point out that the Commission's newly released numbers on broadband subscribers raise even more concerns for the company about the proposed Charter-Time Warner Cable-Bright House transactions. Both Charter and DISH based their estimates of the post-transaction market share on figures from the end of 2013. Citing new FCC data for broadband at the end of 2014, DISH lamented that Comcast and new Charter would control a large percentage of the 25+ Mbps subs. How large a percentage? That figure, along with virtually every other number, was redacted from the document. The FCC reported that there were more than 41.6mln subs with 25+ Mbps downstream service at the end of 2014. **Leichtman Research** estimated that **Comcast** had nearly 22mln broadband subs at the end of 2014 (including under 25 Mbps subs, though DISH said that almost all of the MSO's customers receive at least 25 Mbps), while it pegged **Time Warner Cable's** total at 12.2mln and **Charter** at 5mln. Over the past twelve months, Comcast and Time Warner Cable have accounted for 71% of the 3 million new broadband subscribers, **Strategy Analytics** wrote last week. "As DISH has shown, the Department of Justice has disapproved of mergers that would have resulted in the duopolists' combined market share below the figure at issue here," DISH said. "The Department of Justice has done so for precisely the issue that DISH has raised—the fact that such market concentration between two firms would allow for coordinated action even without active collusion between the players." While DISH has its concerns, a number of comments supporting the mergers continue to pour in, with several indie programmers giving it a thumbs-up. On Fri, **Fuse Media** CEO *Michael Schwimmer* gave the deal his blessing, writing that the companies have "shown through their actions, not just their words, that multicultural independent programmers like Fuse Media will fare better as a result of this combination." Fuse Media recently reached an agreement with Charter to distribute **Fuse** and **FM** across its systems. **AXS TV** co-founder *Mark Cuban* also weighed in, noting that Charter was the 1st operator to launch AXS TV processor HDNet in 2003. "Based on the proven track record of Charter, the new entity would treat independent and minority networks with fairness and in the public's best interest," Cuban wrote. **INSP** voiced similar support, saying other major MVPDs have been less cooperative and even dismissive of family-friendly content. "But Charter, by contrast, consistently has treated INSP fairly and reasonably," CEO *David Cerullo* wrote. Reps



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for **One World Sports** recently met with FCC staffers to express strong support for the merger. Notably, the programmer said Charter had imposed no material restrictions on its rights to license content to national OTT providers. Not every indie net agrees, with **Herring Nets**, owner of **One America News Net** and **AWE**, complaining recently that Charter has made it hard to offer a feed of AWE to OTT devices and streaming services (**CFX**, 11/18).

A+E Networks Carriage: AT&T reached a deal that will see **A+E Networks** continue to air on U-verse and **DirecTV**. Under the deal, the providers will launch the upcoming **Viceland**, which will replace **H2**. The renewal also includes TVE, VOD and mobility for the entire A+E channel suite.

Suddenlink Doings: Suddenlink expanded its partnership with **NetCracker** by engaging in a multi-year managed services program. NetCracker will deliver its CRM-solution to Suddenlink via a fully hosted managed service model. Meanwhile, the MSO announced last week that 3 more residential communities now have 1 Gig service: Georgetown, TX; Lake Charles, LA; and St Joseph, MO. The 1 Gigabit service is available to more than 24 markets, with more launches to come.

Ratings: **Fuse** is feeling pretty good about its Sept 30 relaunch, in which it shifted its focus away from music. The net has reached 18.3mln total viewers in the 8pm-1am time period for the first 6 weeks of the re-launch, and it has doubled YOY ratings among adults 18-34. -- **Telemundo's** Mon-Fri primetime programming from 7-11pm is on track to deliver the net's best Nov performance ever, averaging 1.73mln total viewers and 770Kviewers among adults 18-49, according to **Nielsen**.

5 Questions: *Just in time for the Thanksgiving holiday, Nat Geo's "Saints in Strangers" gives a fresh, historical account of the founding of Plymouth Plantation and the tribulations that ensued in the attempt to establish a new colony. The two-night movie event premiered Sun, Nov 22, with Part 2 airing Mon, Nov 23 at 9pm. We spoke with Nat Geo Channel pres Tim Pastore about the event's goals of authenticity and the net's programming strategy. **The miniseries movie event has been a successful format for you. Will you continue making them at this rate?** We have already proven that scripted does work for us—our "Killing" franchise marks our three most-watched programs in the network history. We look to continue developing programming that contains themes/narratives organic to our brand with rich, provocative and entertaining storytelling. **How does this program fit into your overall programming strategy?** Our overall programming strategy is to look for premium science, adventure and exploration programming. We are very focused on high-quality, entertaining fare, and with scripted, it also has to be rooted in authenticity and facts that are core to the National Geographic brand. "Saints & Strangers" is a great example—it is a story we think we all know, but the truth will surprise everyone. **What kind of research did you do on Native American culture?** We were very fortunate to get the services of Jesse Bowman Bruchac as our Native American dialogue coach. Jesse is one of the last remaining speakers of an Eastern Algonquian language called Western Abenaki, which is an amalgamation of the New England indigenous languages, and likely one of the first such languages the Pilgrims would have heard. The care and passion he brought to getting the Native American story correct was matched only by that of the Native American actors who bring the story to life on the screen. Outside of the use of the language, the production engaged many historical and cultural institutions and scholars, as all of the production departments conducted meticulous research across the script, costumes, and sets. It was a collaborative effort through and through. **Why do you think a version of this story was never told like this?** It's surprising that this story has never really been told before in such a manner. We all think we know the story of the first Thanksgiving, but when you start hearing names like William Bradford and John Carver and Massasoit, you quickly realize that you really don't. It's not an easy story to get right, by any means, and the time and research it takes can be daunting. That's what makes me all the more proud of what we've accomplished with "Saints & Strangers,"—a true, authentic story of American History that is incredibly entertaining, and will appeal to a wide variety of audiences. **Why is this the right time for it?** Last week at the opening night of our "Saints & Strangers" pop-up pub in NY, our director *Paul Edwards* gave a toast where he acknowledged that all of us are from somewhere else. The story of the Mayflower is really the story of the first immigrants, and the conflict and confusion and hardship they endured almost 400 years ago is still relevant today. I think that's something important for all of us to remember as we sit down for Thanksgiving this week, and be thankful.*

High-Speed Speedway: As part of **Daytona International Speedway's** \$400mln redevelopment project, **Arris** will provide high-speed WiFi for fans in some of the venue's high-traffic areas. The phase 1 installation will be complete

BUSINESS & FINANCE

in time for Speedweeks (Feb 13-21).

Programming: FX ordered a 3rd installment of " Fargo." The 2nd installment of the limited series wraps Dec 14. -- **CBS'** \$5.99 SVOD service "CBS All Access" is now available on **Amazon's** Fire TV and Fire TV Stick. New subs can sign up for a free week-long trial.

People: **CSG** CEO *Peter Kalan* will retire at the end of the year, following 19 years with the vendor. Pres/COO *Bret Griess* has been named to succeed Kalan as pres/CEO, effective Jan 1. Griess, 47, has served in various senior and executive management roles with CSG for over 19 years. He will join the company's board in Jan. -- **Nick** named *Chris Viscardi* to the new role of svp, content development for Nickelodeon Franchise Properties. He'll oversee creative strategies for the net's key franchises, including "Teenage Mutant Ninja Turtles" and "SpongeBob." -- *Keith Kazerman* was named head of ad sales product strategy and development for **Discovery Comm**. He most recently served as svp, national ad sales at **DirectTV**.

On the Circuit: Through a donation made by **Altice** founder *Patrick Drahi*, the French-Israeli high school at Mikve Israel will be named after his parents *Marcel* and *Lucette Drahi* and expanded with a new wing. A cornerstone-laying ceremony for the new wing was held Mon.

Cablefax Daily Stockwatch

Company	11/23 Close	1-Day Ch	Company	11/23 Close	1-Day Ch
BROADCASTERS/DBS/MMDS			CONVERGYS:25.64 0.60		
DISH:	63.19	(0.63)	CSG SYSTEMS:	35.74	0.21
ENTRAVISION:	8.37	(0.02)	ECHOSTAR:	38.87	(0.55)
GRAY TELEVISION:	17.39	0.66	GOOGLE:	755.98	(0.62)
MEDIA GENERAL:	15.58	(0.1)	HARMONIC:	5.49	0.09
NEXSTAR:	59.38	(0.91)	INTEL:	34.48	(0.18)
SINCLAIR:	35.03	0.25	INTERACTIVE CORP:	62.98	(0.96)
TEGNA:	28.19	0.06	LEVEL 3:	50.76	(0.18)
MSOS			MICROSOFT:	54.19	UNCH
CABLE ONE:	450.97	10.33	NETFLIX:	125.03	1.19
CABLEVISION:	30.73	(0.25)	NIELSEN:	47.26	(0.45)
CHARTER:	187.04	0.56	RENTRAK:	48.14	(1.35)
COMCAST:	62.13	(0.77)	SEACHANGE:	6.45	(0.08)
COMCAST SPCL:	62.19	(0.82)	SONY:	26.79	(0.1)
GCI:	20.72	0.07	SPRINT NEXTEL:	3.79	(0.04)
LIBERTY BROADBAND:	53.25	(0.16)	TIVO:	9.20	0.09
LIBERTY GLOBAL:	42.40	(0.39)	UNIVERSAL ELEC:	52.01	1.00
SHAW COMM:	20.61	(0.22)	VONAGE:	6.68	0.10
SHENTEL:	50.56	0.24	YAHOO:	33.36	0.25
TIME WARNER CABLE:	184.42	(0.08)	TELCOS		
PROGRAMMING			AT&T:	33.46	(0.2)
21ST CENTURY FOX:	29.98	(0.09)	CENTURYLINK:	27.31	0.08
AMC NETWORKS:	81.45	1.30	FRONTIER :	4.96	0.04
CBS:	50.98	(0.71)	TDS:	28.43	(0.19)
CROWN:	5.81	(0.04)	VERIZON:	44.99	(0.4)
DISCOVERY:	30.71	(0.06)	MARKET INDICES		
DISNEY:	119.42	(0.65)	DOW:	17792.68	(31.13)
GRUPO TELEVISIA:	29.30	0.24	NASDAQ:	5102.48	(2.44)
HSN:	50.60	0.45	S&P 500:	2086.59	(2.58)
LIONSGATE:	35.00	(0.02)			
MSG NETWORKS:	19.93	(0.07)			
SCRIPPS INT:	58.47	0.79			
STARZ:	34.92	(0.43)			
TIME WARNER:	70.52	(0.2)			
VIACOM:	52.63	(1.53)			
WWE:	17.22	(0.03)			
TECHNOLOGY					
ADVANTAGE:	2.22	(0.05)			
AMDOCS:	56.92	0.03			
AMPHENOL:	55.38	0.65			
APPLE:	117.75	(1.55)			
ARRIS GROUP:	30.50	0.11			
AVID TECH:	6.58	0.01			
BLNDER TONGUE:	0.38	(0.03)			
BROADCOM:	53.33	(0.2)			
CISCO:	27.43	(0.14)			
COMMSCOPE:	28.96	0.66			
CONCURRENT:	4.76	0.01			



Major Topics Include:

- Web shows and series
- Deals between web content creators, MCNs and digital studios
- Technology enabling more convergence between traditional and new media

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