

Little has been written about [yesterdays announcement](#) that Yahoo would be selling display and video ads for Comcast's websites, in particular, [Comcast.net](#).

What's so special about this deal beyond the sheer size of Comcast and the inventory it makes available to Yahoo to sell ? its the network stupid.

The one thing that Google doesn't have is a contained network. Comcast does. The implications are significant.

For the first time, an advertising monetization platform, such as Yahoo's Panama, can be integrated into a NON internet video platform. When Comcast serves video from comcast.net to its own high speed data customers, those are NOT internet customers. They are private network subscribers. The vagueries and uncertainties of the internet are gone. Comcast has the ability to control and monitor the quality of service in the delivery of the video content from the host on its network to the user destination on its network. Its the equivalent of offering services on your corporate network. The opportunities far exceed what are available on the general internet.

In short, Yahoo and Comcast can start working together to develop video content and ad platforms that Google can't touch. Any video that is streamed from Comcast.net can be streamed at bit rates that match the user's throughput, including commercials. If Comcast can deliver on demand video at full DVD quality to PCs, it can deliver commercials at that quality. All without ever touching the internet.

More importantly, since all the users of Comcast.net video are Comcast customers, the two companies can work together to leverage customer data (within privacy limits) to deliver ads that are not only personalized, but also can evolve to be "over the top" of the set top box and be delivered to the TV in the future using Comcasts future switched digital capabilities and OCAP features.

Together Comcast and Yahoo have created an advertising playground that could potentially define the future of advertising on the net. Rules that even Google and Microsoft would have to follow.

The competitive landscape for video advertising just changed, and no one even noticed.

Of course, it still doesnt create enough bandwidth for the delivery of HDTV over the net, nor does it fix Comcast's problem of not offering [HDNet](#) and [HDNet Movies](#) to its customers, but thats a topic for another blog.

If done right, this is the first step towards integration of integrating advertising from websites