

Cablefax Daily™

Tuesday — October 15, 2019

What the Industry Reads First

Volume 30 / No. 198

Spectrum Circus: Senate to Question Pai on C-Band Plans

The reallocation of spectrum in the coveted C-band will be back in the Washington limelight this week, thanks to a Senate Financial Services and General Government subcommittee hearing called by chairman *John Kennedy* (D-LA) for Thursday at 10am. The hearing's purpose? To conduct oversight of the FCC spectrum auctions program, including the eventual sale of underused spectrum in the between 3.7-4.2 GHz. The witness list is short, only including **FCC** chairman *Ajit Pai*, **Citizens Against Government Waste** president *Tom Schatz* and **Taxpayers Protection Alliance** president *David Williams*. Kennedy has been a fierce opponent of the **C-Band Alliance's** plan, which would reallocate the spectrum via public sales rather than a standard FCC-run auction. He's made that known to Pai, sending him a letter in March arguing that spectrum deals conducted behind closed doors would primarily benefit foreign-owned satellite companies. "A privately managed spectrum sale conducted behind closed doors will favor certain parties, exclude others, and most importantly, lead to the inefficient deployment of valuable 5G spectrum," the Louisiana lawmaker wrote. "Our rural families stand to lose the most when only one or two giant corporations control all of the spectrum access." Thus far, Pai has kept his opinions on both the C-Band Alliance plan and that of the coalition that includes **ACA Connects**, **Charter Communications** and the **Competitive Carriers Association** to himself, often deflecting Congressional questions as he weighs the pros and cons of each plan. And while he may still be battling over which is the better option, that's not going to protect him from the fierce questioning of the subcommittee on the details of a private spectrum sale. "This hearing will be the most important opportunity for investors to gauge how strongly Senator Kennedy, and potentially other Senators, want to push Pai on the issues of who runs the sale process and who gets the money," **New Street Research** analyst *Blair Levin* said in a note. "We think Pai will try to avoid debating Senator Kennedy but we think he is likely to be forced to be more forthcoming than he has been in the past and it could be that this becomes the moment where Pai publicly reveals his position on questions of interest to investors." The C-Band Alliance's plan for selling the spectrum up for grabs, also called the FUEL plan, hasn't received much support from its stakeholders because of the many questions left unanswered about the sale process, including a detail involving making a contribution to the US

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Treasury. **Eutelsat** CEO Rodophe Belmer expressed his frustration during the company's Q419 earnings call in July, saying "there is no real agreement and alignment" on the question and that it creates some uncertainty on the net proceeds Eutelsat would receive through the auction. But Eutelsat, which abruptly exited the C-Band Alliance in early September, is rethinking its choice, making the C-band story that much more interesting. On October 1, Belmer met in separate meetings with Pai, FCC commishes *Michael O'Rielly* and *Geoffrey Stark* and their legal advisors. Another meeting was held with *Umair Javed*, legal advisor to commish *Jessica Rosenworcel*. Belmer discussed Eutelsat's reasons for joining the C-Band Alliance and its departure, but also said Eutelsat is very open to rejoining the C-Band Alliance moving forward if the structure and governance of the group as well as the proceeds allocation "could be altered to better represent the interests of all affected stakeholders," according to an ex parte filing.

Evercore Drops AMC Networks to Underperform: Evercore ISI has revised its expectations for **AMC Networks** ahead of the upcoming earnings season, changing its recommendation to "Underperform" from "In Line." Analyst *David Joyce* also dropped AMC's price target from \$60 to \$50. Joyce cited accelerating cord-cutting trends and fear that a large distributor could drop AMC as reasons for the adjustments.

Insight TV Launches US Operation: Global 4K channel **Insight TV** is headed over to the US, launching Insight TV Studios to focus on original content for broadcast and digital platforms. The company is also seeking co-production partners and brands for the finance aspect. Series currently available for license include "Car Crews with Supercar Blondie," "Epic Exploring" and "Modern Day Gladiators." *Natalie Boot*, head of media sales for Insight TV, will head up the US operations alongside *Mark Romano*, vp of the Americas.

Disney+ Is On The Way: Disney+ lit up Twitter Monday morning, taking to the social platform to announce a host of content headed to the service, debuting Nov 12. The streamer posted a 300+ tweet thread listing the titles in chronological order, starting with "Snow White and the Seven Dwarfs" in 1937. Disney+ will have basically every best-known title from its famous vault, but also lesser-known films like "Fuzzbucket" (1986) and "The Computer Wore Tennis Shoes" (1969). Most of the announcements focused on the company's back catalog, but a few new upcoming originals were also listed, including Star Wars spin-off series "The Mandalorian" and "The Lady and the Tramp" live-action remake. The streamer will cost \$6.99 a month.

Watch Teams Up With Ericsson for CAF II Buildout: Watch Communications partnered with Ericsson to



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deliver increased internet connectivity to rural communities in Ohio, Illinois and Indiana. Watch will use Ericsson's Radio System hardware and software to build its fixed wireless access network in areas where it will use CBRS and licensed spectrum. The move is part of its \$53mln reward from the **FCC's** Connect America Fund II auction.

Hulu Expands 4K Video Support: Hulu is rolling out 4K service again after suddenly removing it in 2018. Initially, its 4K content was available only on **Apple TV 4K** and Chromecast Ultra. Now, it is available on Xbox One devices, with support for **Amazon Fire TV** and LG WebOS forthcoming.

Tubi Jumps to Europe: AVOD service **Tubi** is launching in the UK in early 2020, with additional territories to follow. The company also announced it's creating a dedicated kids section with over 5K hours of content at launch on Oct 21. Tubi Kids will roll out to consumers via Roku devices, and will eventually be available on all major streaming devices.

Frontier Gets Spooky: In honor of the spooky season, **Frontier Communications** is hosting a nationwide Halloween costume contest. The competition is in its first year, and has a prize fund of \$1K. The first place winner will bring home \$500, and two runners up will earn \$250 each. Contestants can enter from all 50 states, and entries include a 200-word description. Submission deadline is Nov 7 and is free to enter.

Sling Launches Free Experience: Beginning Tuesday, Sling TV is launching a free experience on Android and Amazon devices ahead of the fourth Democratic Presidential debate on CNN Tuesday evening. The content array is limited, but no credit card information is needed to set up it up. Content includes free episodes of shows such as "Hell's Kitchen" "Live PD: Police Patrol" and "3rd Rock from the Sun." Users can opt to subscribe to Sling by setting up an account. To launch the experience users can download the Sling TV app on a Roku, Android or Amazon Fire TV and follow instructions to access guest mode.

ESPN Mentors Women: **esnpW** and the **US Department of State** teamed up to host the eighth year of the Global Sports Mentoring program, taking place Oct 11 - Nov 19. The program brings together 16 aspiring female leaders from around the world alongside top American female execs from sports and business.

MSG Networks Celebrates 50: **MSG Networks** is celebrating 50 years of sports content. The net first debuted Oct 15, 1969 with a game between the **New York Rangers** and **Minnesota North Stars**. The net is unveiling a commemorative logo and dedicated hashtag #LiveSince1969, and airing new original content airing throughout the across linear, digital and social channels.

Tremor Video Boosts Self-Server Tools: Programmatic video platform **Tremor Video** is launching self-service DSP improvements in order to make it easier for media buyers to plan, execute and track campaigns. The company said the enhancements include a modernized user interface and added audience segmentations and machine learning technology designed to optimize video ad buys. Additionally, Tremor Video released reporting enhancements that it says will provide more actionable campaign planning and optimization, increased granularity of insights and improved ease of use. The single-page design allows brands to view a campaign and all placements in one unified page, including visuals that capture delivery and performance. Brands can also manage an entire campaign within the same screen, and apply campaign-level settings across all placements at once.

Programming: **Showtime** is premiering "Celeste Barber: Challenge Accepted" Nov 1 at 9pm. The hour-long comedy special features Barber in her first network comedy special, filmed in NYC. -- **Nat Geo** will premiere "Expedition Amelia" on Oct 20 at 8pm. The two-hour special follows explorer *Dr. Robert Ballard's* attempt to solve the mystery of *Amelia Earhart's* disappearance. -- **Telemundo Deportes** is delivering exclusive digital content customized for each platform, available 24/7. The content includes the sports division's first-ever English-language series, digital extensions of linear programming and news and editorial capsules covering soccer leagues and tournaments. -- **Urban Movie Channel** greenlit docuseries "Behind Her Faith" that looks at the power of faith and its impact on women in entertainment, sports, music, business, politics and ministry. -- **Science Channel** will premiere "Unexplained and Unexplored" Nov 10 at 10pm. The eight-episode series follows explorers *Justin Fornal* and *Emiliano Ruprah* as they dive into historical mysteries around the world. -- **Disney Channel** ordered a family dance competition series "Disney Fam Jam." The series is inspired by choreographer *Phil Wright's* "The Parent Jam" dance classes. Each episode will feature two families competing in three rounds of dance battles, and production begins in November.

People: **Comcast** tapped *David Tashjian* as regional vp for the Oregon/SW Washington region. He replaces *Rodrigo Lopez*, who now leads the Washington region. Tashjian comes over from the West division, where he served as vp of sales and operations.