

Cablefax Daily™

Monday — April 20, 2020

What the Industry Reads First

Volume 31 / No. 076

CBRS Auction: Comcast Doesn't Want Midco Interest to Count it Out

It's not clear if **Comcast** will choose to participate in the upcoming auction of Priority Access Licenses in the 3.5 GHz CBRS (Citizens Broadband Radio Service), but it at least wants the chance to be a player. It probably can't unless the **FCC** waives rules that prohibit an entity from having a controlling interest in more than one auction application. South Dakota-based operator **Midco** is 50% owned by **Midcontinent Communications Investor** and 50% owned by **Comcast Midcontinent**, an indirectly owned subsidiary of Comcast. Both Comcast and Midco have asked this FCC in recent days to suspend the rules, arguing that Comcast is essentially a passive investor. "Comcast in no way controls Midco and the two entities have and will continue to develop their own separate, independent auction strategies. As such, if both Comcast and Midco file applications to participate in Auction 105, both participants will bid in a straightforward manner and no anticompetitive bidding activity will occur," Midco told the FCC. Midco has discussed with Comcast Midco its interest in participating in the auction, but declared that it hasn't and won't provide Comcast with any information regarding its auction plans. Midco completed successful CBRS testing last year and has been vocal on plans to use the CBRS band to deploy high-speed fixed LTE wireless broadband throughout its rural footprint. To help keep everything above board, Midco said its management committee won't meet during the auction quiet period and it's limiting info on its bidding strategies to a small number of people on a "need to know" basis. If Comcast is going to bid, the FCC will have to act quickly with the short-form filing window closing on May 7. The FCC has already had to push back the timeline of the CBRS auction because of the COVID-19 pandemic. Under the new timeline, upfront payments are due June 19, with bidding set to begin July 23. "Prohibiting Comcast from participating in the auction would be inequitable to Comcast because it has 'no reasonable alternative'—it cannot prevent Midco from filing an application that would potentially disqualify Comcast," Comcast told the FCC in its waiver request. It also argued that allowing Comcast to participate would serve the public interest because maximizing the number of bidders promotes a successful auction. More than 22K licenses will be offered in Auction 105, the most to ever be up for grabs in a single auction.

Operators Taking iPhone Pre-Orders: Comcast, Altice USA and Charter are all accepting pre-orders for **Apple's** upcoming iPhone SE, available April 24. Comcast is offering \$200 off over 24 months with the purchase of the new

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iPhone for new customers that transfer their number to Xfinity within 30 days. The phone is available from all three providers for a price of \$399.99 or in payment plans.

COVID-19 Response: Cox extended its free Connect2Compete service through July 15. It's the company's low-cost internet offer for families with a K-12 student. Customers that sign up between March 13 and May 15 are eligible for the offer. After July 15, the service will cost \$9.95 a month. That sort of initiative continues to earn the praise of FCC chmn Ajit Pai. During remarks Friday at an online workshop, Pai noted that more than 700 broadband and phone providers have taken his pledge to ensure no consumer loses service or is charged late fees over the next 60 days because of inability to pay and WiFi hotspots are opened to all. He noted that many providers have gone above and beyond by offering free internet service and upgraded speeds. Why are these companies acting in the public interest? "I think the biggest factor is that these decisions are made by people. And in trying times, most people want to do the right thing, not just for their company, but for their fellow citizens and for their country," he said. "But I also think that the market creates powerful incentives for companies to do the right thing. If your company doesn't step up for you, or even worse, engages in bad behavior, consumers will be much more likely to turn to the competition in the weeks, months, and years ahead."

Comic-Con Canceled: San Diego Comic-Con has been canceled for the first time in its 50-year history. SDCC was originally scheduled for July 23-26, and will now take place July 22-25, 2021. "Recognizing that countless attendees save and plan for its conventions each year, and how many exhibitors and stakeholders rely upon its events for a major portion of their livelihood, they had hoped to delay this decision in anticipation that COVID-19 concerns might lessen by summer," organizers said in a statement.

Net Neutrality Watch: Comments on the FCC's Restoring Internet Freedom proceeding are due Monday, but some are calling for the agency to push the deadline a second time. The Wireline Competition Bureau already granted a 21-day extension for comments, but L.A., NYC, Santa Clara County and the Santa Clara County Central Fire Protection District are requesting a further 60-day deadline because of the COVID-19 pandemic. "Put simply, we remain in the thick of responding to the current public health emergency. And this is exactly the sort of emergency that was at the center of the concerns local governments articulated in the original record in these proceedings—concerns that the Commission failed to consider," the group said. The FCC is seeking to refresh the record after the DC Circuit remanded some elements of the order back to the agency. The FCC wants info on how changes in the net neutrality order might affect public safety, asking questions such as whether network improvements made by possible prioritization arrangements benefit public safety applications. The proceeding is the FCC's most active right now, with 8100+ filings over the past 30 days.

We are so proud of our industry and the many ways companies are responding to the pandemic. Free internet, fresh content, employee safety and much more.

The Cablefax Editorial Team is reporting on vital industry updates every day. We want to hear from you so please reach out to share your news and stories.

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Amy Maclean, Editorial Director, amaclean@accessintel.com or 301.354.1760

The Collapse of Theatrical Windows?: With theaters shuttering, will day-and-date releases become a thing? **Universal Pictures** is the first out of the gate, announcing "Trolls World Tour" will be available April 10 for a rental. Other in-release movie titles are set to be available as soon as this Friday. The movies will be available on **Comcast, Sky** and a "broad range of on-demand partners." Titles to be made available include "The Man" and "Emma" with a suggested retail price of \$19.99 in the US.

Tuesday — March 17, 2020 What the Industry Reads First Volume 31 / No. 050

For Now: Providers Set Aside Disputes During Coronavirus Outbreak
As they face the common enemy that is the coronavirus pandemic, **Cox Media Group** and **DISH** have set aside their retrans dispute for now so that **DISH** can resume its carriage of 10 **CMG** stations in Maryland, Oregon, Washington, Arizona, Louisiana, California, Mississippi and Idaho. No word on how long the truce will last.

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Friday — March 13, 2020 What the Industry Reads First Volume 31 / No. 050

New Normal: Companies Roll Out Contingency Plans in Face of Covid-19
With a growing number of students and employees working from home, it's mission critical for the nation's broadband providers during the Covid-19 pandemic. Operators big and small are up-ending their day-to-day operations to ensure service continuity.

Wednesday — March 18, 2020 What the Industry Reads First

Covering Covid-19: Content Companies Step Up Efforts
Programmers are shuffling schedules to respond to the coronavirus crisis. **The Weather Channel** is airing live programming at 50 minutes past the hour to share educational content. **ABC** is airing live programming at 50 minutes past the hour to share educational content. **Pledge** is airing live programming at 50 minutes past the hour to share educational content. **Pledge** is airing live programming at 50 minutes past the hour to share educational content. **Pledge** is airing live programming at 50 minutes past the hour to share educational content.

From the Commission: Another 116 broadband and telephone service providers have taken the **Pai's Keep Americans Connected Pledge**, agreeing to take specific steps to keep Americans connected for 60 days. Some notable names taking the pledge include **Hotwire Communications**, **Middle**

Rural Broadband Notes: The FCC's Wireline Competition Bureau is seeking comment on a petition by **Johnson Telephone Co** requesting that it waive the Rural Digital Opportunity Fund rule that prohibits CAF Phase II defaulters from participating in the auction. -- The FCC will hold a webinar on May 5 to provide an overview of the adopted policy framework for the RDOF Phase 1 auction. Phase 1 will award up to \$16bln for the deployment of voice and fixed broadband services at speeds of 25/3 Mbps or faster to unserved locations nationwide. -- The **USDA** has created a one-stop-shop of federal programs that can be used by rural communities, organizations and individuals impacted by the pandemic. [The COVID-19 Federal Rural Resource Guide](#) includes info on federal funding and partnerships.

Ratings: The premiere of **TNT's** docuseries "Shaq Life" last Thursday pulled in more than 3mln total viewers across all platforms, and delivered 1mln viewers per episode L+3.

Programming: **Disney's** "Artemis Fowl" will launch exclusively on **Disney+** June 12. It was originally set for a theatrical release before the pandemic. -- **ESPN** launches the Madden NFL 20 Celebrity Tournament, Sunday, 12pm, **ESPN2**. It is a single-elimination bracket played on **EA Sports' Madden NFL 20** game, with the winner receiving a donation to **Feeding America** in their name. The championship airs April 26 at 12pm on **ESPN2**.

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Research

- US OTT access revenue growth is estimated to grow by 29% to \$28.5bln in 2020, and \$44.2 bln for 2022.
- OTT access spending in 2022 will be more than half (55%) of what is spent on TV access, up from 22% in 2019.
- Independents, programmers and TV access providers represented 58.4%, 34.4%, 7.2% of 2019 US OTT access revenue, and forecast 49.5%, 47.2%, 3.3% for 2022.
- Broadcast & cable TV network online advertising, driven by OTT, is estimated to represent 7.7% of 2020 and 9.7% of 2022 US TV advertising revenue.

(Source: [Convergence Research Group](#))

Quotable

"You go a few more months and while people say, one of the last things I'll cut is my subscription to entertainment which I desperately need to get through the day. That will eventually take its toll. People will not have the discretionary income to afford it. But it doesn't change the dynamics of anything. You've got the competitors. Streaming is taking over the world. Hollywood is irrelevant. The only companies that have a true path, absolute clear business model path forward have nothing to do with the history of the entertainment business. Amazon and Netflix. Everybody else, good luck to them. I mean, they may be able to build subscription services that may be profitable, but that world has changed forever. I think this pandemic has nothing to do with -- other than earnings are going to be much less for a while."
 – **IAC & Expedia chmn Barry Diller on CNBC "Squawk Box."**

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