

Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

Overachiever: T-Mobile Fixed Wireless Beats Expectations

T-Mobile may be known for its mobile products and magenta mantras, but its home broadband initiatives are picking up steam. The company ended 2021 with 646,000 broadband customers, easily exceeding its initial 500,000 target, and 224,000 of those came in 4Q. Roughly 40% of customers are new to T-Mobile, opening opportunities for the company to cross-sell its mobile services and create stronger relationships with those customers.

“It’s abundantly clear that customers are loving the network performance and the simplicity of this 5G-based product,” CEO *Mike Sievert* said on the company’s earnings call Wednesday. “I think a lot of people are going to be surprised by how mainstream this product really is with our unique 5G network capacity to back it up.”

T-Mobile didn’t offer guidance for home broadband customer growth for 2022, but the executive team said they expect this year to be markedly stronger. The majority of customers in 2021 came from suburban and urban environments, and many of those were transitioning away from cable and fiber providers. Average users are using 300-400Gb/month and a mid-single digit percentage of customers are using more than a terabyte. Capacity concerns have been a talking point since wireless providers voiced their interest in fixed wireless broadband, but Sievert doesn’t expect T-Mobile to target power users that use multiple terabytes of data each month. “80-

90% of the customers are right in the sweet spot of where our product performs,” he said.

Verizon is also staking its own claim on the broadband marketplace with its fixed wireless product, but T-Mobile hasn’t seen much friction with its wireless rival on that front. Part of that comes from their different approaches to entering the space. Verizon has focused on targeted, phased launches within urban areas, while T-Mobile wanted to launch last year with the capability to serve a large number of urban, suburban and rural communities.

“We’re really not out to respond to other people’s initiatives. We are out to delight customers with an offer we’re proud of, and the thing that I think they will see is that it’s backed by this massive capacity network,” Sievert said. “Others do have massive capacity in a few places with millimeter wave, but they’ve also demonstrated issues there with self-install and other complications.”

T-Mobile’s service revenue came in at \$15 billion, up 6% YOY. Postpaid net account additions were 315,000 while postpaid phone net customer additions were 844,000. 4Q21 was a strong quarter for cable’s wireless services as well with both **Comcast** and **Charter** recording their best yet since the respective launches of their mobile products. Even so, Sievert isn’t seeing cable as a threat to T-Mobile in terms of taking share.

“Cable had a strong quarter in Q4, but it wasn’t an outsized quarter. Basically, it was 10.4% of gross adds, and we’ve been saying for a long time we see them right around 10%. They’ve been consistent performers and when you have those kinds

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of smaller bases that you'll see a little bit more variability in nets, but their activations are very consistent," he said. "We've been coexisting with them and we're really just not concerned about some step change catalyst."

ZUCKER SHOCKER

Staffers across **Turner Sports** and **CNN** were reeling from *Jeff Zucker's* sudden resignation Wednesday morning. The Chair of **WarnerMedia's** News & Sports division said he failed per company policy to disclose when a consensual relationship began in recent years with a close colleague. Zucker didn't name the colleague, but she was quickly identified as top CNN lieutenant *Allison Gollust*, who will remain in her role as EVP and Chief Marketing Officer. In a note to staffers, Zucker said he was asked about the relationship during the investigation into *Chris Cuomo*. With the WarnerMedia-**Discovery** transaction expected to close next quarter, it may take a beat to parcel out his duties. CNN's Chief Media Correspondent *Brian Stelter* reported that Zucker had hoped to stay for a short period to ease the transition, but WarnerMedia wouldn't allow it. CNN execs *Michael Bass*, *Amy Entelis* and *Ken Jautz* will lead the news operation on an interim basis pending the close of *Discovery*. Turner Sports President *Lenny Daniels* is expected to pick up Zucker's duties for the sports division at least in the interim. Zucker was just inducted into **The Cable Center's** Hall of Fame in November, describing to **CFX** how his youth helped when he took over **NBC's** "Today Show" (he was 26). "I was young, single, and totally willing to dedicate almost all of my time to a job that was incredibly demanding. I also brought a fresh perspective to something that, at the time, was a bit bogged down in some problems of its

past," he said. Zucker rose up the ranks at NBC in the 1980s alongside *Discovery* boss *David Zaslav*, a close friend. Gollust also worked with Zucker during his time at **NBC**. In 2018, Gollust was among seven women honored at the **Alliance for Women in Media's** inaugural Gracies Leadership Awards.

COMMERCE SCHEDULES SECOND SOHN HEARING

Senate Commerce set Feb. 9 as the date for a second hearing on *Gigi Sohn's* nomination to serve as an **FCC** Commissioner. Ranking Member *Roger Wicker* (R-MS) has been pushing for another hearing to probe her involvement with **Locast** and a settlement with broadcasters. Sohn was supposed to be voted on during a committee markup today, but she was removed after Dems lost the needed vote of Sen. *Ben Ray Lujan* (D-NM), who suffered a stroke. He's expected to make a full recovery, with **CBS News** reporting he could be back at work in four to six weeks. Wednesday's executive session was without formal votes on Sohn or **FTC** nom *Alvaro Bedoya*, but it was full of heart. Much of the approximately 15-minute meeting was dedicated to offering bipartisan well wishes to Lujan. "We all love Sen. Lujan. We love his spirit and he has been an incredible friend to so many of us," Senator *Amy Klobuchar* (D-MN) offered. "I know as part of your recovery you'll be watching us on **C-SPAN**." Republicans on the committee called him a pleasure to work with, bringing strong energy to every issue that has come before Senate Commerce. "If having a good, positive attitude adds to a quick recovery, then Ben Ray will recover quickly," Senator *Marsha Blackburn* (R-TN) quipped.

STARLINK OFFERS FASTER SPEEDS FOR HIGH PRICE

Starlink, SpaceX's satellite broadband division, has launched

Mark Your Calendars!

Cablefax 2022 Award Submission Deadlines

The FAXIES Awards

Deadline: March 11
Final Deadline: March 18

Top Ops Nominations

Deadline: April 1

The Diversity List Nominations

Deadline: June 3
Final Deadline: June 10

Most Powerful Women Nominations

Deadline: August 12
Final Deadline: August 19

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a premium service tier designed to meet the needs of high demand users. The company has begun accepting orders for Starlink Premium, a service that helps “ensure bandwidth for critical operations even during times of peak network usage,” according to its website. Starlink Premium promises download speeds of 150-500Mbps and latency of 20-40ms, and like the base Starlink product, won't have data caps or require a contract. On Starlink's help page, a post recommends the service for residential locations, small offices of 10-20 employees and storefronts. Deliveries will begin in 2Q22, but better service comes with a hefty price tag. A deposit of \$500 is required to place an order. In total, Starlink Premium hardware comes in at \$2,500 and internet service is priced at \$500/month.

SKYSHOWTIME OVER REGULATORY HURDLES

Comcast and **ViacomCBS** are one step closer to launching a streaming jv in Europe. The pair revealed that **SkyShowtime** has received full regulatory approval and plans are in place to launch the streamer in more than 20 European markets by the end of the year. Should that come to be, the service will reach 90 million homes before 2023. At launch, the service will offer 10,000 hours of content from the **NBCU** and **ViacomCBS** catalogs. There's no word yet on pricing of the service.

FREEWHEEL KICKS OFF PARTNER PROGRAM

FreeWheel launched an initiative Wednesday focused on certifying integrated TV and premium video buyers and sellers. The Partner Certification Program will also welcome data and technology companies and hopes to create a more efficient media supply chain. Those accepted to the partner program will be featured on an online portal, and the certification criteria will continue to evolve over the coming months. Inaugural partners include **Nielsen**, **Comscore**, **Oracle Advertising** and **Basis Technologies**.

METRONET, VEXUS FIBER MERGING

The fiber land grabs continue on a fast and furious pace, with **MetroNet** and **Vexus Fiber** merging. It's the latest example of consolidation in the fiber space. Vexus operates fiber networks in Texas, New Mexico and Louisiana, while MetroNet serves communities in several states, including Texas, Wisconsin and Missouri. Combined, the companies served 15 states and more than 150 communities. Each will continue to operate under their current brands with their current leadership teams. The terms of the merger weren't disclosed, but both companies are part of **Oak Hill Capital's** investment portfolio. Vexus said the deal will help the company reach more homes and businesses in the Southwest faster, while MetroNet said Vexus shares its fast growth/high customer service mentality.

COMMERCIAL APPEAL

Telemundo Deportes will run a 30-second commercial featuring *Kelly Clarkson*, *Blake Shelton* and sportscaster *Andres Cantor* promoting the 2022 FIFA World Cup in Qatar during the Super Bowl LVI. It's the second time the FIFA World Cup will be promoted during the Super Bowl, which will broadcast on Feb. 13 on **NBC**, **Telemundo**, **Universo** and **Peacock**. – **Charter's** launching a new ad campaign dubbed “We Are Local,” featuring its em-

ployees and emphasizing their connections to the communities Spectrum serves. It also highlights small businesses powered by Spectrum's advanced connectivity offerings. The campaign has already started and will air over the next month or so and includes 10 ads—two national spots and eight targeting local markets.

CABLE CENTER RELEASES INNOVATION REPORT

When it comes to innovating from within, there's work to be done. For its first ever [Intrapreneurship & Innovation Report](#), **The Cable Center** worked with association **C2HR** to gather insights from industry HR professionals on today's business climate. Although 70% of people leaders said driving innovating from within is important for growth, only 23% believe they've developed a process of innovation. The interactive report is available online as a resource for idea sharing and innovation leadership, complete with guest commentary and video interviews. Among those featured in the report is consultant and author *Simone Ahuja*, who is the newest course leader for The Cable Center's Intrapreneurship Academy. She discusses the concept of frugal innovation.

TCA'S BACK

CTAM's portion of the **TCA** Winter Tour kicked off Wednesday (virtually), with **Starz's** new President of Original Programming, *Kathryn Busby* introducing the network's largest programming slate ever. “One of the things that drew me to Starz is the company's deep commitment to women and underrepresented audiences. As important as representation is in front of and behind the camera, it's also about delivering unique, premium programming that's bold and provocative,” Busby said. For 2022, that includes limited series “Gaslit” (premiere April 24), which tells the story of Watergate from the perspective of unlikely whistleblower Martha Mitchell (*Julia Roberts*) and “Becoming Elizabeth,” which focuses on the early life of the orphaned teen who would become Queen. Starz also highlighted “Power Book IV: Force,” the third spinoff in its Power universe franchise, debuting Sunday.

PEOPLE

Aisha Thomas-Petit was promoted to Chief People & Diversity Officer at **AMC Networks**. She succeeds Chief Transformation & People Officer *Jennifer Caserta*, who has decided to depart the company after nearly 20 years. Thomas-Petit joined the company in late 2020 as its first Chief Diversity, Equity and Inclusion Officer. Her expanded role adds oversight of people and culture strategy, including global talent acquisition, leadership development and compensation and benefits.

ON THE CIRCUIT

NAMIC is launching two new leadership development programs this year aimed at mid-level career professionals. The programs—“[Leading Inclusive Teams](#)” and “[Strategic Management Series](#)”—build on the association's Executive Leadership Development Program and are presented in partnership with the University of Virginia's Darden School of Business. The programs are open to all eligible professionals, regardless of race and ethnicity, with sessions running from October through April 2023.

Think about that for a minute...

And So It Begins

Commentary by Steve Effros

I've been warning about the reality of that old saying "...beware of what you ask for, you may get it" for a long time now. We're now beyond the "beware" point. Things are starting to happen that I suspect will upend decades of policy norms.

An overstatement? I hope so, but I'm afraid it's going to be several years before we can tell. Let's go back a bit to paint the picture. It's been clear for quite some time that politically we have been engaged in a long fight over federal versus state rule. I hesitate to use universal catchwords, but for brevity I'll simply say the "conservative" view has been opposed to increasing federal control and the "liberal" view has favored it.

The shifting of the Supreme Court to a conservative bent at the same time the Congress has been rendered essentially nonfunctional has set up a situation where whether we like it or not, policy power is going to devolve back to the states. We can see this in lots of the "hot button" issues like abortion and mask mandates as well as a whole host of issues that affect telecommunications.

A ruling by the Ninth Circuit Court of Appeals last Friday allowing California to go ahead with its state "net neutrality" rules even though federal regulators argued that such a set of rules would violate their "pre-emption" of the issue is the bellwether indicator of where things might be going. I'll get into the details of the logic or lack of same that the Court used another time. The important thing to note here is that a state is drawing up rules that will not only affect its citizens, but by extension, since broadband and the internet are national and international actors, it could affect a whole lot more.

There are a lot of intersecting things going on here. The national political battle, the Supreme Court limiting the federal ability to respond with regulatory flexibility by saying, as Justice Gorsuch has argued, that federal agencies can only do that which is specifically written into law by Congress, and the aforementioned inability of Congress to do much of anything. If we really had to have laws that guessed, for instance in the telecommunications marketplace, what the next technology

would be and include it in the core law before the technology existed, it obviously would not work. But that's almost where we are. And if the feds don't have that flexibility, then the power shifts to the states. And each state is an island. The Commerce Clause becomes a nullity.

Imagine one state writing a law requiring gun registration with confiscation being the penalty for noncompliance and the adjoining state requiring all homeowners to possess a gun (yes, there is such a law in a local Southern jurisdiction already.) How about one state requiring censorship of material on social media based on perceived political bias and the adjoining state making it illegal to block or throttle social media. You can see where this is going; chaos in the courts.

Am I overstating the case? Maybe. But I don't see any way around the likely adoption by various states of incompatible rules and regulations for businesses, like telecom, which are inherently interstate, and indeed, international. We already see the problem manifesting itself on the international stage with China blocking major internet players from access to their citizens on the basis of violating local laws. I suspect the same could become true between, say, California and Utah. Then what?

I just don't think there has been much serious consideration of the ongoing push to dismantle what has, at times, become an excessive federal presence. Yes, there should be moderation.

But this "solution" is likely to be worse than the problem.



Steve

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(Steve Effros was President of CATA for 23 years and is now an advisor and consultant to the cable industry. His views do not necessarily reflect the views of Cablefax.)



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