Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

Kimmel's Back: What About Nexstar & Sinclair?

Jimmy Kimmel's late-night show is coming back Tuesday night—but will broadcast station groups air it? **Nexstar** and **Sinclair** previously said they would preempt the show in the aftermath of comments Kimmel made concerning the killing of conservative activist *Charlie Kirk*. Neither responded to requests for comment by our deadline. ***CFX*** also reached out to **TEGNA** and **Scripps** about their plans, but did not hear back by our deadline.

Disney made the decision to indefinitely suspend "Jimmy Kimmel Live" last week shortly after **FCC** Chair *Brendan Carr* made comments that broadcast license holders should push back on content from Disney and others or potentially face fines or risk losing their licenses. Disney's decision came after Nexstar, the largest broadcast station owner in the U.S., said it was preempting the show for the foreseeable future. After Disney suspended the show, many took to social media to report that they had cancelled **Disney+** subscriptions.

"Last Wednesday, we made the decision to suspend production on the show to avoid further inflaming a tense situation at an emotional moment for our country. It is a decision we made because we felt some of the comments were ill-timed and thus insensitive," Disney said in a statement Monday. "We have spent the last days having thoughtful conversations with Jimmy, and after those conversations, we reached the decision to return the show on Tuesday."

Democrat FCC Commissioner *Anna Gomez* said she was glad to see Disney "find its courage in the face of government intimidation," thanking Americans "across the ideological spectrum who spoke loudly and courageously against this blatant attempt to silence free speech." She also brought up the broadcast ownership cap and media ownership rules under review by the agency, something Nexstar is pushing for as it pursues a $6.2 billion acquisition of TEGNA. "As this FCC considers steps that would let the same billion-dollar media conglomerates that caved in to government pressure grow even bigger, we must combat these efforts to stifle free expression," Gomez said. "I will keep fighting to protect consumers, promote a healthy media ecosystem with viewpoint diversity, and ensure local broadcasters have the independence to stand up to government threats."

Some Republicans, including Sens. *Ted Cruz* (R-TX) and *Rand Paul* (R-KY), expressed criticism over Carr's remarks, while a group of Democrats have demanded he resign as FCC chair. "Brendan Carr's got no business weighing in on this, but people have to also realize that despicable comments, you have the right to say them, but you don't have the right to employment," Paul said during **NBC News**' "Meet the Press" on Sunday.

Carr, speaking at Concordia Summit 2025 on Monday, sought to clarify his previous statements regarding Kimmel and ABC licenses—specifically the "We can do this the easy way or the hard way" comment made on a podcast last week. "What I spoke about last week was that when concerns are raised about news distortion, there's an easy way for parties to address that and work that out. In the main, that takes place between local television stations that are licensed by the FCC and what we call 'national programmers' like Disney. They work that out, and there doesn't need to be any involvement of the FCC," Carr said. "Now, if they don't, there's a way that's not as easy, which is someone can file a complaint at the FCC, and then the FCC by law, as set up by Congress, has to adjudicate that complaint. And what I've been very clear in the comments of the Kimmel episode is the FCC—and myself in particular—have expressed no view on the ultimate merits, had something like that been filed."

Carr joked that he hasn't seen as much interest in the FCC's activity since the 2017 net neutrality debate, but got more serious, saying he's of the belief that "there are a lot of Democrats out there that are engaged in a campaign of projection and distortion. And distortion is they are completely misrepresenting the work of the FCC and what we've been doing."

NAB was quiet in the immediate aftermath of the dust-up, but CEO *Curtis LeGeyt* penned a blog over the weekend declaring that the First Amendment makes clear that broadcasters—not the government—bear the responsibility for editorial decisions. Fun fact: the annual First Amendment Day is celebrated this week on Sept. 25.

"Make no mistake, NAB is fighting every day in Washington to ensure broadcasters have the scale to compete with national and global behemoths, to invest in newsrooms and local programming, to innovate and deliver freely available content to every American — whether on a television, radio, smartphone or car dashboard," LeGeyt wrote. "But all of that is futile if we cannot fulfill our most sacred responsibility: reporting to our communities without fear of government retribution." The NAB chief added that government pressure to cover events in a particular way is nothing new, pointing to the *Obama* administration using the Espionage Act to investigate journalists' sources and "growing barriers to access" under the *Biden* administration. "Today, we continue to see veiled threats suggesting broadcasters should be penalized for airing content that is contrary to a particular point of view. These attempts were wrong then, and they are wrong now," he wrote.

Another recent blog post worth reading ahead of First Amendment Day doesn't mention Kimmel, but tackles how conservative media has risen to its present position of prominence as well as the Trump effect. "President Trump not only understands media. He underpins media. Trump dominates the day by making news, and he manipulates and massages it like no one before—from tweets to television," writes *Adonis Hoffman*, an independent counsel in Washington and Trustee of **The Media Institute** and a member of its First Amendment Advisory Council. "The president's impact on communications and the media is both intractable and indelible. It is not an understatement to claim that we live in an all-Trump, all-the-time news cycle that extends well beyond Breitbart, Fox, Newsmax, One America, and X."

NEW NCTA BOSS READY TO WORK

Monday marked Day 1 for *Cory Gardner* as **NCTA**'s new president and CEO. "My focus is clear: deliver results people can feel—reliable, high-performance networks, smart spectrum policies, stronger cybersecurity and customer experiences that continue to improve," Gardner wrote in a social media post that noted he'll be listening and learning from NCTA's members and teams in the weeks ahead. The industry will get its introduction to the former Republican Colorado senator at **SCTE TechExpo25** (Sept. 29-Oct. 1, DC), where he'll moderate discussions with **FCC** Chairman *Brendan Carr* and **House Commerce** Chairman *Brett Guthrie* (R-KY). Gardner's entry—and TechExpo—come as a cloud of uncertainty hangs over the Beltway. With lawmakers out of town until next week, there's not much time to pass anything to keep the government open past Sept. 30. Gardner should have a unique perspective on a shutdown, with his term as a senator (2015-2021) occurring during the longest government shutdown in U.S. history (Dec. 2018-Jan. 2019). He was the first Republican senator to call for an end to that shutdown, even if it meant no funding for *Trump's* border wall. *Michael Powell* officially exited last week after nearly 15 years as CEO of NCTA – The Internet and Television Association. He was feted with a retirement celebration on Sept. 9 at D.C.'s Mayflower Hotel in an event one attendee described as feeling very much like the old Chairman's Reception from INTX or The Cable Show, complete with a mix of high-end and powerful attendees. There were at least a couple hundred people in attendance, ranging from current and former NCTA board members, NCTA staff members past and present, and a cross-section of other industry notables. Hats off to NCTA Chief of Staff *Nilda Gumbs*, who chaired the ceremony, which included a tribute video put together by **A+E Global Media** and remarks from former **Cox Communications** President *Pat Esser*, who chaired the board when Powell was hired, and remarks from current Cox President *Mark Greatrex,* who chairs the board today. We're told Powell was his normal eloquent self, saying that having the opportunity to work along NCTA's staff was the job of a lifetime and he valued the chance to advocate on behalf of an industry that had changed the lives of Americans. The larger industry will get its chance to wish him well next month at the **Kaitz** event, where he's being honored with the ChangeMaker Award for Leadership.

FIRST LOOK AT VERSANT NUMBERS

Versant, the company that'll soon spin away from **Comcast NBCUniversal** and hold a chunk of its linear and digital assets, shed more light on its blueprint and financial stature as it prepares to

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open shop next year. According to an **SEC** filing, the assets that'll move to Versant—**MSNBC (MS Now), CNBC, USA, Golf Channel, E!, SYFY, Oxygen True Crime** and other digital platforms—finished 2024 with $7.06 billion in revenue, down from $7.45 billion in 2023 and $7.83 billion in 2022. Versant's 1H25 revenue was down YOY from $3.63 billion to $3.42 billion, while its net income for the same period dropped YOY from $801 million to $670 million. The company's total equity as of June 30 was $10.58 billion, holding $500 million in cash and cash equivalents. Upon the separation, Versant will have approximately $2.75 billion of debt, though it intends to use a portion of the proceeds to make a cash payment of $2.25 billion to Comcast as consideration for Versant assets. Comcast and imminent Versant leadership have been clear with their reasoning for the spinoff, highlighting the ability for Comcast NBCU and Versant to place more focus on their respective portfolios. **New Street Research**'s take is it'll benefit Comcast's growth profile since "the rest of Comcast is growing at a faster pace than the cable assets being spun off as part of Versant." However, it's no secret that the Versant team will have its hands full with a declining pay TV landscape, but the company's filing revealed where things stand with regard to the advertising reach of its networks. USA led the group with 66 million U.S. households as of the end of 2024, with MSNBC, E! and SYFY covering 65 million. CNBC and Oxygen reach 64 million and 62 million, respectively, while Golf Channel was at 54 million. Versant didn't disclose specific revenues for advertising, but it labeled it as a key factor (and risk) in business operations. The company noted it's experienced and expects to continue sustaining declines in ad revenue "caused by shifts in advertiser priorities primarily due to increased competition for the leisure time of viewers, increased audience fragmentation and increased use of streaming and digital platforms (all of which we expect will continue in the foreseeable future), as well as by cyclical factors, such as election cycles and the timing of major sporting events, the availability of advertising-blocking technologies and macroeconomic conditions." On the bright side, Versant noted its digital platforms have grown revenue in recent years. We've seen MSNBC announced a rebrand to MS Now ahead of the separation, and one more change may come, albeit a few years from now. Versant said its use of the CNBC brand is subject to a five-year trademark license agreement with Comcast. Once that expires, "we may need to reposition the related network and related platforms and products."

T-MOBILE TAPS GOPALAN AS CEO

T-Mobile's anticipated succession plan became official Monday. The company announced Srini Gopalan will replace Mike Sievert as CEO on Nov. 1, with Sievert shifting to a different, newly created management role while maintaining his place on the board. Sievert, who replaced John Legere as T-Mobile's CEO shortly after its merger with Sprint was finalized in April 2020, will advise on long-term strategy, innovation, talent development and external relations. In his six-year tenure, Sievert guided T-Mobile to expand its market cap by over $200 billion and grew its wireless and broadband customer bases while also negotiating deals to acquire Lumos and UScellular and become the business MVNO partner for Charter and Comcast. "One fact has become crystal clear: Srini is ready to lead. He is highly skilled, passionate and incredibly knowledgeable, and above all he is obsessed with taking our employee and customer experience to the next level. I have full trust and confidence in his vision for T-Mobile," Sievert said. Gopalan became T-Mobile's COO in January, having joined from the uncarrier's parent company Deutsche Telekom. There, he oversaw its business operations in Germany and is credited with doubling the company's growth rate while expanding its fiber business and mobile market share. Before Deutsche Telekom, Gopalan held leadership roles with Vodafone, India's Bharti Airtel and Capital One. Gopalan will get a new contract as part of the transition, with the new agreement good through Nov. 1, 2030. He said he was "deeply honored" to be appointed as T-Mobile's next CEO and will continue the company's investments in 5G, next-generation mobile networks and AI. "For a decade, I admired this team from afar … And over the last several years on T-Mobile's board and as chief operating officer, I've seen firsthand what makes this team extraordinary," Gopalan wrote on LinkedIn. "… Because of that spirit, we've already become the most admired and customer-centric company in our industry. What lies ahead of us, though, is even more exciting because over the last 5 years we have built America's best network and digital/AI capabilities that are far ahead of anyone else in our industry." The culmination of T-Mobile's multi-year succession plan leaves Gopalan in an advantageous spot, considering the company's momentum across financial metrics and customer acquisition. **Bernstein Research** thinks T-Mobile will remain in a good spot under Gopalan's guidance, saying he "brings a steady hand at the wheel" and may usher in more network innovation.

SCOTUS SAYS TRUMP CAN FIRE FTC COMMISH, BUT MAY OVERTURN

The **U.S. Supreme Court** is allowing President *Trump* to fire Democratic FTC Commissioner *Rebecca Slaughter* for now, but a larger question on whether to overturn a precedent set in 1935 looms. In March, Trump ousted Slaughter along with fellow Dem *Alvaro Bedoya*. Both sued on the basis of Humphrey's Executor v. United States, which decided a president doesn't have the authority to remove an FTC commissioner without cause. While SCOTUS' latest ruling means Slaughter will depart from the FTC for now, the High Court set up a contentious battle in December to consider whether to reverse Humphrey's Executor. The court's three Dems dissented.

VIZIO ADDS DIRECTV APP

It's getting easier to use the **DirecTV** app, with it now available directly on **Vizio** Smart TVs. The provider has been pushing flexible programming packages, including a curated collection of FAST channels through the MyFree option and its skinny Genre Packs. The app features the "Your TV" carousel with favorite teams, live stats, recent channels and tailored recommendations front and center.

INSIDE SOURCE

Join the Network (R)Evolution at TechExpo25

By Janelle Morse, VP of Engagement & Strategy, SCTE

The narrative surrounding broadband has fundamentally shifted from one of gradual evolution to outright revolution. We are at a critical juncture, tasked with redesigning the very foundation of connectivity. This transformation is the heart of our theme for SCTE TechExpo25, the largest broadband conference in North America: "Network (R)Evolution."

Whether you view this change as the next logical step or a complete paradigm shift, your place is with us. From September 29 to October 1, the architects of this new era will convene in Washington, D.C., to map out the next decade and beyond. Holding our industry's premier event in the nation's capital gives us a vital opportunity to demonstrate for policymakers how our collective innovation creates a more connected and prosperous America.

A Blueprint for Actionable Innovation

TechExpo25 is designed to provide actionable answers to the industry's most pressing challenges, including the operationalization of AI, managing workforce dynamics, and making intelligent, future-proof capital investments.

The technologies showcased are not theoretical; they are deployable. Prepare for immersive explorations into edge intelligence, alongside the practical application of operational LLMs and agentic AI that enable self-optimizing, autonomous networks. We will chart the course to seamless digital experiences through deep dives on DOCSIS® 4.0 technology, PON, 5G, Fixed Wireless Access and secure cloud-native infrastructures.

Attendees will leave with strategies for creating new revenue through software-defined services and quality of experience pipelines, powered by advancements in adaptive Wi-Fi and next-gen broadband. The urgent need for operational modernization and sustainability will also be a core focus, with sessions on AR-driven construction, underground asset protection and energy-resilient microgrids.

New Formats for Deeper Engagement

This year's program has been reimagined for greater interaction. The agenda is filled with hands-on masterclasses and workshops focused on delivering skills you can implement immediately. To facilitate high-value partnerships, we are launching the Select Connect concierge matchmaking program to pair operators with technology vendors. We are also expanding informal networking with guided walking tours of Washington D.C.

Because streaming infrastructure is now fundamental to our digital world, we are excited to debut our inaugural StreamTech track. This new track is devoted to the technologies redefining streaming at scale, from achieving low-latency live delivery and predictive scaling to building truly immersive user experiences.

Highlights From the Main Stage

Our lineup and session topics this year include:

- **Comcast Leadership**: David Watson, CEO of Connectivity & Platforms, and Charlie Herrin, President of Technology & Product for Connectivity & Platforms, will set the tone for the event by outlining Comcast's roadmap for the future of connectivity.
- **More Must-See Keynotes**: Hear from Madalina Suceveanu (Liberty Global) on network convergence, Elad Nafshi (Comcast) on the next chapter of wireline innovation, and leaders from Ookla and the World Broadband Association on using analytics to strengthen infrastructure. Plus, Phil McKinney (CableLabs) will interview Frédéric Perron (Cogeco) and Bin Haga (J:COM).
- **CTO Power Panel**: Top technology executives from Charter, Rogers and Mediacom Communications will gather for an in-depth discussion on the future of broadband networks, moderated by CableLabs.
- **New Revenue Streams**: Senior leaders from GFiber, C Spire and Rogers will examine how edge computing and differentiated service models are transforming broadband from a utility into a growth engine. Also, hear a case study from the Money Gram Haas F1 Racing Team, Circuit of The Americas, Comcast and Commscope on new infrastructure investments into recurring, co-created revenue streams.

Making the Most of TechExpo

TechExpo25 is the assembly point where the future of broadband is built. It is an opportunity to condense half a year of R&D and business development into three hyper-productive days. To get the most from it, arrive with a plan, engage with thought-provoking questions and leave room for serendipitous encounters that forge powerful alliances.

Attendees and press can register here.

SCTE TechExpo25