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WHAT THE INDUSTRY READS FIRST

Convergence Show: FCC Chair Connects Spectrum, Broadcast and AI at CES

The ongoing march of convergence was on full display this week at the **Consumer Electronics Show**. Some years, cable and media execs largely sit it out. But this year's CES has a pretty big cable contingent, with **NCTA** President/CEO *Cory Gardner* making the trip to Vegas along with several other top execs at the cable association. **Disney** used the show for its Annual Global Tech & Data Showcase, announcing that vertical video is coming to **Disney+**. **AMC** was on hand to provide a sneak peek of upcoming Silicon Valley comedic drama "The Audacity," which debuts in April.

A key CES speaker for attendees of all stripes was **FCC** Chairman *Brendan Carr*, who took the main stage Thursday for a far-reaching Q&A with **CTA** CEO *Gary Shapiro* that touched on spectrum, broadcast and AI. At the end of the chat, Shapiro said to Carr, "I didn't expect you to be so (dramatic pause) brilliant." The Chairman came back with: "I'm different in real life than on Twitter."

Carr's appearance came one day after he announced a January FCC vote to [open up the 6GHz band](#) to more unlicensed devices. "We're going to effectively be supercharging WiFi—that's probably the best way for consumers to understand it—from higher power, more outdoor uses and everything you're seeing right here, from AR to VR, is going to benefit from these increased enhancements that we're doing in the 6GHz band," he said.

From there, the chairman touted that there are major spectrum moves taking place, including auctions for AWS 3.0 and C-band.

Of course, you can't talk about spectrum without a question about the next generation of cellular technology. When Shapiro asked if Carr would be the Chairman of 6G, he gave an answer that the cable industry—unhappy with a [White House memorandum](#) that focuses on 6G for the 7GHz band instead of opening it up for unlicensed WiFi—could find some hope in.

"I think it's that we're blending into this... entire world of connectivity. Whether it's the new generation Low Earth Orbit satellites, all these sort of new mini dishes, whether it's direct to cell, whether it's unlicensed or fixed wireless, we're in a new era of true convergence," Carr said. "You can put 6G as a label around that. That's fine, but I think it's really that more choice, more competition, multiple modes of technology. They're going to blend, and they're going to come together. And that's really the future for us right now."

Of course, FCC chairs know their audience and CES is a WiFi-friendly crowd. When the conversation drifted into broadcast and the public interest standard, spectrum again came up. Carr reiterated his point that broadcasters' free government spectrum makes them obligated to serve the public interest standard in a way that a podcast or cable network doesn't have to.

If a broadcaster doesn't want to comply with a public interest standard, he offered a few options, including turning in their license and distributing content via the internet or some other form of media. "If you want the unique privilege of broadcasting your content over the public airways, and to your point, all the benefits that come with it—retrans, must carry, various

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rights—then you've got to comply with the public interest standard," he said.

Another option would be to put that spectrum back up for auction to let everyone have a fair shot of purchasing it without a public interest obligation, Carr said. He didn't delve too far into the world of ATSC 3.0, with broadcasters and the CE industry disagreeing on tuner mandates and an **NAB** proposal for a transition plan to the NextGen TV standard. Carr said the FCC is generally supportive of the standard, particularly since it can be used for datacasting, but that the agency is "sensitive" to the points CTA has made.

From there, Carr again reiterated his concerns that national programmers like Disney, **Comcast**, **Fox** and **Paramount** have too much control over local broadcasters: "We're looking at lots of different ways to really empower those local broadcast TV stations to actually identify, as required, the needs of their local communities and serve those needs in the local communities, and not merely become a passthrough for content produced by those national programmers."

Last month's White House AI Executive Order instructed the FCC to start a proceeding looking at a national approach to reporting and disclosure standards for AI models to preempt conflicting state laws. Carr said the agency hasn't made any decisions yet, but suggested there may be lessons from *Trump 1.0's* repeal of Title II net neutrality regulations. "We kept in place transparency obligations on non-Title II services, information services, under Section 287 the Communications Act. That's one potential way forward—should we have some sort of disclosure regime at the federal level for non-Title II services in order to have a better national standard? Should we have nothing?"

During a CES session Wednesday, *Michael Kratsios*, Trump's science advisor and Director of the White House's Office of Science and Technology Policy, said a 50-state patchwork of laws would be "anti-innovation," particularly for smaller startups and businesses that don't have the resources that a **Google** or **Meta** has. He noted that he's working with Special Advisor for AI and Crypto *David Sacks* on a legislative proposal that would seek to create a national framework that "is pro-innovation." That plan should be unveiled sometime this year.

The second piece to the puzzle, according to Kratsios, is infrastructure. "We are building a tremendous amount of data center capacity in the United States on the backs of great American technology, but doing that requires a lot of electricity and it requires a lot of effort to be able to get the permitting straight and everything moving forward," he said, adding that Trump has pushed data center companies to build their own power infrastructure so that it doesn't impact overall electricity demand.

TEAMS BAIL ON FDSN, MAIN STREET-DAZN DEAL IN LIMBO

The chances of **Main Street Sports** and **DAZN** reaching a deal seem to be dwindling, and while there might be another player hoping to step up to the plate, **MLB** teams are pulling the plug. All nine baseball clubs that partnered with Main Street and **FanDuel Sports Network** terminated their agreements, according to *The Athletic*, which [cites](#) two people briefed on the contracts. That includes the Angels, Braves, Brewers, Cardinals, Marlins, Rays, Reds, Royals and Tigers, but the door is open for the teams to negotiate new deals and remain in FDSN's portfolio—a move that'd resemble what transpired when then-**Diamond Sports** went through bankruptcy. Meanwhile, *SBJ* [revealed](#) Main Street has indicated to leagues that the [previously rumored agreement](#) for DAZN to acquire a majority stake is looking less likely, citing sources. Negotiations "are all but extinguished" due to disagreements between franchises and DAZN on certain conditions. That includes DAZN wanting the digital rights for **NBA** and **NHL** teams while signing agreements through 2028-29, in addition to reduced fees and a future 50-50 profit share split. However, the RSN owner has been telling folks there's another company contemplating a deal: **Fubo**, although *SBJ* notes other sources have pushed back on the validity of the vMVPD's interest. While MLB and the NBA are likely to take over for some of their castaway teams, there remains other options. The *Miami Herald* [notes](#) that the Heat could sign a temporary pact with WPLG 10, a former **ABC** affiliate of 69 years before becoming independent last year. Fellow independent station and **Scrapps**-owned WSFL-TV could be a landing spot for the Marlins as well.

PSKY'S DISCOVERY GLOBAL MATH

On Thursday, **Paramount Skydance** Chairman/CEO *David Ellison* said the company "remained committed to engaging with [the **WBD** board] on the merits of our superior bid." This was in response to the WBD board's recommendation that shareholders stick with the plan to sell streaming and studio assets to **Netflix** rather than tender their shares to PSKY. Shareholders have until Jan. 21 to decide whether they want to take PSKY's all-cash offer of \$30 per share for all of WBD. The WBD board warned that PSKY's offer is inferior to Netflix's \$27.75 per share cash-and-stock deal, but in its own message to WBD's shareholders, PSKY said that the math isn't math-ing, including when it comes to the value of **Discovery Global**. The breakdown of the Netflix deal is as follows: \$23.25 in cash, plus \$4.50 in Netflix stock gets you to \$27.75, but WBD shareholders will also get Discovery Global stock as part of the package, which the board said will ultimately offer more value than PSKY's hostile bid. But PSKY is arguing that

DG isn't worth what WBD thinks, with its own analysis valuing the spinoff at \$0 per share. It also mentioned **Versant Media's** trading debut this week, saying that its "performance to date illustrates the challenged path ahead" for WBD's own spinoff. (Versant saw steady declines in its share price during its first three days on the Nasdaq, although the company's leadership assured this was to be [expected](#) as things settled.) Showing its own math, PSKY's valuation of DG "assumes a forward EBITDA multiple of 3.8x, in-line with Versant's trading multiple on January 7th, and \$3.9 billion of next twelve months EBITDA for Discovery Global as of the estimated spin completion date (Q3 2026)" as well as a net debt of \$15 billion, according to PSKY's estimates, making DG "significantly more leveraged" than Versant. PSKY added that Netflix is currently "trading well beneath the low end of its collar," warning that shareholders could end up receiving less than the \$4.50 per share of Netflix stock. As it stands today, PSKY values the total of the "unmistakably inferior" Netflix package at \$27.42 per share. PSKY, meanwhile, signaled that it would stay put at \$30.

TRIAL DATE SET IN WBD-SLING

A federal judge has scheduled jury selection to begin in **Warner Bros. Discovery's** challenge of **Sling TV's** flex passes for Nov. 16. The order from U.S. District Judge *Arun Subramanian* said that unless the parties file a stipulation of dismissal or settlement, they should be prepared to go to trial as scheduled. Underlined and bolded, the order read: "The trial date will not be adjourned on account of a settlement in principle." WBD had requested a trial beginning as soon as Oct. 19 or at the court's earliest convenience thereafter, while Sling owner **Dish** had argued that it was premature to set a trial date at this time. WBD and **Disney** have separately sued over Sling's August launch of 24-hour, weekend and 7-day streaming subscriptions, claiming breach of contract. The court declined their requests for a preliminary injunction and, on Friday, Dish filed [counterclaims](#) against Disney claiming it has a stranglehold on the sports skinny bundle.

ZASOWSKI TO LEAD DISNEY DISTRIBUTION

Disney promoted *Jimmy Zasowski* to President, Platform Distribution, Disney Entertainment and **ESPN**, reporting to Disney Entertainment Co-Chairs *Alan Bergman* and *Dana Walden* and ESPN Chairman *Jimmy Pitaro*. It puts him in charge of the global distribution and monetization of Disney's direct-to-consumer streaming services, linear portfolio (including the eight **ABC**-owned television stations), ABC's broadcast affiliations and film and television programming across home entertainment and content licensing. When longtime Disney distribution head *Justin Connolly* [left](#) for **YouTube** in May, Zasowski and Disney EVP, Platform Distribution Sales *Sean Breen* stepped up to lead the division. Breen will take on an expanded role with the

EMEA, LATAM and APAC regions moving forward. Zasowski has been with Disney since 2009, most recently as EVP, Platform Distribution Strategy.

DISNEY TAKES TECH & DATA SHOWCASE TO CES

Disney spent Wednesday evening at **CES** showing off its technology enhancements to advertisers, but it made sure to talk about a new feature coming to **Disney+** this year. Following the launch of "Verts" on **ESPN's** enhanced app, the feature will be expanded to Disney+ in the U.S., with a particular focus on news and entertainment. The company's sixth Global Tech & Data Showcase saw the House of Mouse introduce a new video generation product designed for advertising that enables brands to make CTV-ready commercials in line with existing brand guidelines and assets. The tool can produce multiple variations depending on audience, context and placement. In addition to a new AI-powered internal planning platform, Disney is building on the Disney Compass product it first unveiled last year. It's now offering a unified view of brand performance across campaigns and platforms via the Disney Compass Brand Portal, which features category benchmarks and AI-generated summaries. Soon, it'll also add key learnings and identify new opportunities for brands (using AI, of course). Regarding measurement, Disney is hoping to help improve attention, brand health, search and attribution with the Disney Advertising Brand Impact Metric. The new approach brings together outcome- and performance-based insights with visibility into specific behaviors and KPIs lead to better performance.

MORE CES TIDBITS

DirecTV Advertising is introducing new premium CTV video options to the digital out-of-home marketplace, led by DirecTV Remote, a dedicated DOOH network that the organization introduced at last year's **CES**. DirecTV Remote now gives advertisers programmatic access to live TV premium inventory in settings such as offices, waiting rooms, retail shops and restaurants. Premium hotels will be enabled later this year as well, while in-flight inventory will remain available as a managed service. – **Quickplay** spent 2025 ramping up its AI development, culminating with the launches of Quickplay Shorts and its AI Studio tools. The company showcased some statistics at CES to illustrate the business impact of its products, citing a tier-one broadcaster witnessing a 40% decrease in cost of ownership, a more than 100% spike in watch time for AI-recommended content and over 130% in fill rate improvements for advertising based on AI-suggested content. For another tier-one broadcaster, it logged a 38% improvement in monthly active users during the first month of implementation, noting that Shorts fueled discovery and app downloads. It also had a 30% increase in user retention following high-profile events. Other results from various Quickplay partners include 500% audience reach growth through social syndication and Shorts and a 300+% surge in content activation.

PROGRAMMER'S PAGE

Snoop, Tucci Add Star Power to NBCU Olympics

NBCUniversal will be very busy during “Legendary February.” Next month, NBC and **Peacock** will not only be the home of Super Bowl LX and the 2026 NBA U.S. vs the World All-Star Game but also the Milan Cortina Winter Olympics (Feb. 6-22), which will spotlight plenty of star power, and not just the world-class athletes on Team USA. Viewers will also get to experience the Winter Games through the perspective of multi-hyphenate megastar *Snoop Dogg*, who returns after being universally hailed by fans and the press for his commentary segments at Paris 2024. “I read an article this morning that said sports are better with Snoop in it, and I would say the Olympics are better with Snoop in it,” said *Molly Solomon*, Executive Producer & President, NBC Olympics Production, during an NBCU “Legendary February” press event this week in NYC. “Snoop was such a revelation to us [in Paris]. We had a plan, but we didn’t know he would catch fire.” She added that “the magic of Snoop is that he wasn’t there to hog the spotlight. He wanted to spread his aura on all these people and elevate the athletes.” Snoop Dogg won’t just recap each day’s biggest stories, alongside Olympics host *Mike Tirico*, but also explore the landmarks and culture of Northern Italy. “I’ll be bringing my puffy jackets, snow pants, goggles, skates (and will definitely be iced out),” promised Snoop, who also made waves Monday as a guest analyst during NBC’s Clippers-Warriors broadcast. Of course, no tour of Milan and Cortina would be complete without *Stanley Tucci*, who’s become America’s foremost expert on traveling around Italy. The “Search for Italy” and “Tucci in Italy” host will join the Olympics team on-site to explore the local cuisine and lifestyle. “He is the preeminent Italy whisperer of maybe this generation, and so he’s going to take us on a tour of the good life,” said Solomon, who was happy to learn that Tucci goes skiing in the region “all the time.” “He also has just been so great to work with. He thinks like a producer.” Will we get to see Snoop and Tucci cross paths during their tour of Italy next month? Solomon teased: “There is going to be somewhere on an Italian highway where Snoop is going to meet Stanley, and it will be memorable.”

REVIEWS

“Landman,” Season 2, streaming with new eps Sunday, **Paramount +**. Do you wanna argue with the success of *Taylor Sheridan*? If he thinks “Landman” should go soapier in Season 2, moving away from the oil workers’ camps and concentrating on the women and other parts of West Texas oil man Tommy Norris’s life (the wonderful *Billy Bob Thornton*), we’ll not argue. Especially considering one of the things weighing on Tommy’s mind is his aged dad, T.L., a role that *Sam Elliott* and his mellifluous voice own. Considering the world’s chaotic state, enjoying moments like T.L.’s ‘physical therapy’ session or Angela (*Ali Larter*) and Ainsley’s (*Michelle Randolph*) forays into senior home volunteering seems fine, despite too much objectifying of nearly every woman character in the cast. A modest proposal: Sheridan should add meat back on the bone next season and export some of Landman’s syrup to the final chapters of the excellent “Mayor of Kingstown” (also Paramount +), where star *Jeremy Renner* didn’t crack a smile all year and the violence seemed over the top at times.

BASIC CABLE		
P2+ PRIME RANKINGS*		
(12/29/25-01/04/25)		
MON-SUN	MC	MC
	US	US AA
	AA%	(000)
ESPN	2.435	7837
FNC	0.466	1502
CNN	0.289	931
HALL	0.212	681
HGTV	0.181	581
MSNOW	0.176	568
TLC	0.140	450
TBS	0.129	415
HIST	0.115	371
USA	0.108	349
FOOD	0.104	336
TNT	0.102	328
ESPN2	0.100	322
PRMNT	0.093	301
INSP	0.093	298
GSN	0.089	287
TVLAND	0.087	281
HALLMYS	0.087	280
DISC	0.086	277
A&E	0.078	251
FX	0.075	242
ID	0.074	237
LIFE	0.070	225
SYFY	0.070	225
NAN	0.066	214
OXY	0.063	203
AMC	0.060	193
FRFM	0.057	183
BRAVO	0.053	171
COM	0.053	169
WETV	0.051	163
NWSMX	0.048	156
E!	0.045	146
DSNY	0.045	144
NATGEO	0.043	138

*P2+ L+SD rankers are based on national Nielsen numbers, not coverage.



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