

# Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

## Vendor View: Despite Changes, AI Remains a Priority for Vendors

A key part of the convergence race is the vendors that help facilitate connectivity and communications, and they've been staying busy recently while the competitive landscape around them continues to heat up. But even as companies undergo changes, it seems AI remains a driving force in investment decisions.

**Amdocs** had a busy week that began with a CEO transition and packed earnings report Tuesday. After posting \$1.16 billion in revenue and \$746 million in managed services revenue for fiscal 1Q26, the company said it agreed to a multiyear partnership extension with **T-Mobile**. Amdocs "will continue to support T-Mobile's consumer and business domains, including implementation of Gen AI technology where applicable," while also assisting with integration activities related to common systems.

Like T-Mobile, Amdocs is entering a period of transition. President/CEO *Shuky Sheffer* is set to retire after spending more than 35 years with the company, whose client portfolio includes **Optimum**, **AT&T** and **Vodafone**. *Shimie Hortig*, Amdocs' current Group President, Americas Business Group, was named Sheffer's successor.

On the topic of AI, T-Mobile may be intrigued by Amdocs' new agentic operating system (aOS) tailored for telecommunications, something that Group President, Technology and Head of Strategy *Anthony Goonetilleke* said creates "new avenues

for growth." The aOS is made to help CSPs implement generative AI into their operations and create agentic processes that are built with a telecom-specific framework. The architecture of Amdocs' aOS contains "Cognitive Core" agents that are equipped with customizable settings, continual performance optimization and analysis benchmarks. Cognitive Core then powers an enhanced product suite that can be used across customer care, monetization, service calls and network operations.

If that sounds familiar, **Calix** is another company that's been [sharpening its agentic AI tools](#) for broadband providers in recent years. Its latest upgrades to the Calix Broadband Platform offer autonomous, task-based technology that can perform workflows fueled by model context protocol servers that analyze data sources.

AI was one of the primary motivators for **Amphenol's** \$10.5 billion deal to buy CommScope's (now **Vistance Networks**) Connectivity and Cable Solutions business. The acquisition closed last month and should bring a mixture of short- and long-term boosts, according to Amphenol chief *Adam Norwitt*. The CCS unit is anticipated to generate \$900 million in sales for 1Q26 and \$4.1 billion for the full year. Longer term, Norwitt said that CCS expands Amphenol's capabilities around fiber optic interconnect and puts the company in a better strategic position.

We'll learn more about what Vistance looks like post-Amphenol sale later this month. Vistance, which still owns

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an Access Networks Solutions unit and Ruckus Networks, will unveil its 4Q25 earnings Feb. 26. Not far from Vistance's North Carolina operations is **Corning**, a vendor fresh off the news of a [multiyear pact](#) with **Meta** to supply optical fiber, cable and connectivity products that'll help scale advanced AI data centers. CEO Wendell Weeks said last week that Meta was an anchor customer for the expansion and upgrade of Corning's manufacturing, adding that the company is wrapping up similar long-term agreements with other major customers.

AI will surely find its way into **Harmonic's** earnings call on Feb. 19, as well as additional details on the pending sale of its Video Business arm to **MediaKind**. Harmonic announced the transaction as part of its effort to focus more on the broadband business, with the company set to receive \$145 million in cash from the deal that's scheduled to close in 1H26.

**CSG** checks both the "[focused on AI](#)" and "undergoing transition" boxes. Shareholders voted late last week to approve its \$2.9 billion merger with Japanese-based **NEC Corporation**. CSG expects it to close by the end of 2026, subject to customary closing conditions and regulatory approvals. CSG finished 2025 with \$1.22 billion in revenue, up 2.2% from 2024. This week, the company announced a 6% increase in its quarterly cash dividend payment, marking its 13th consecutive year of an increased dividend payout. The new quarterly payment amount has been increased to \$0.34 per share of common stock to be paid on April 1 to shareholders of record as of the close of business on March 18.

## GIUSEPPE COMMISSO TO LEAD MEDIACOM AS CEO

**Mediacom** dropped the interim from *Giuseppe B. Commisso's* title, announcing Friday that the board has appointed him as Chairman and CEO of the operator. Previously GVP, Corporate Finance, Commisso was named Vice Chairman and Interim CEO of Mediacom shortly before the [death](#) of his father *Rocco B. Commisso*, Mediacom Communications founder, Chairman and CEO. "Although unfortunate circumstances have led to this appointment, I look forward to working with Mediacom Communications' talented workforce to provide great service to our customers and communities. Together we will pursue thoughtful, sustainable growth for our business, at a time when crosswinds are facing our industry. I intend to continue to execute on my father's vision for the company and ensure that Mediacom Communications enjoys a bright future," Commisso said in a statement. He also serves as President of ACF Fiorentina, a Florence-based soccer club playing in the first division Serie A league in Italy.

## SUPER BOWL, BAD BUNNY CAP SEASON OF NFL DOMINANCE

All eyes will be on Grammy Award-winning artist *Bad Bunny* during the Super Bowl LX halftime show this Sunday. Ahead of the presentation, **Telemundo** will air an interview with the singer at 4:30pm as part of the network's pregame show. Conducted by "El Pelotazo" host *Veronica Rodriguez*, the segment will dive into Bad Bunny's milestone as the first solo Latin headliner to deliver a primarily Spanish-language performance at the Super Bowl. It will air on Telemundo, **Universo** and **Peacock**. – While fans of football, Bad Bunny and astronomically expensive TV commercials prepare to watch the clash between the Patriots and Seahawks, **MoffettNathanson** is reflecting on the NFL's outsized viewership performance this season, which it called "a prime example of the league's cultural dominance," citing **Nielsen** numbers. The league reached 18.7 million viewers on average across the regular season, a 7% uptick vs the previous season and its best performance over the past 16 seasons. The NFL's weekly packages with **Amazon Prime Video**, **ESPN/ABC** and **NBC** all saw viewership gains, as well as the daytime slates on **CBS** and **Fox**. The postseason matchups mostly followed suit, minus the two conference championship games, which were down 7% in viewership when measured together. The big question is whether this year's football season finale will be able to top Super Bowl LIX, which delivered almost 218 million viewers across Fox and **Tubi**. **MoffettNathanson** thinks Super LX will benefit from being simulcast on NBC and Peacock as well as Nielsen's switch to the Big Data + Panel methodology.

## NFLX, PSKY ASKED TO COMMIT TO PROTECTING JOBS IN WBD RACE

Following a **Senate Judiciary** antitrust hearing this week, Sen. *Adam Schiff* (D-CA) and Rep. *Laura Friedman* (D-CA) sent letters to **Netflix** co-CEOs *Ted Sarandos* and *Greg Peters* as well as **Paramount** CEO *David Ellison* concerning how each party would work to "preserve and expand" film and TV jobs were they to acquire **Warner Bros. Discovery**. "We've continued to watch as these jobs, and many companies, have left the United States altogether for foreign venues abroad," they wrote in the letter obtained by the trades. "We expect and look forward to your companies' public commitments to protecting, growing and reassuring the hundreds of thousands of industry workers and their families in your respective bids." The lawmakers asked for the companies to commit to protecting jobs as well

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as provide concrete steps they will take in that effort. At the hearing Tuesday, Sarandos and WBD Chief Revenue and Strategy Officer *Bruce Campbell* [said](#) that Netflix was committed to keeping WB's movie studios intact and investing further in them. In a letter to UK creatives this week, Ellison [called](#) the Netflix-WBD deal "monopolistic."

**GRAY EXPANDS TELEMUNDO AFFILIATE RELATIONSHIP**

**Gray Media** inked a new multi-year affiliation agreement with **Telemundo Network** that includes new local affiliates in Dayton, Ohio (WZCD-LD); Chattanooga, Tennessee (WTVL-CD, WDNN-CD) and Lafayette, Louisiana (KNGC-LD) on Gray-owned stations in those markets. Gray is the Spanish-language network's largest affiliate group, with the expanded Telemundo portfolio now reaches over 1.6 million Hispanic TV households.

**CNN AT MILAN CORTINA**

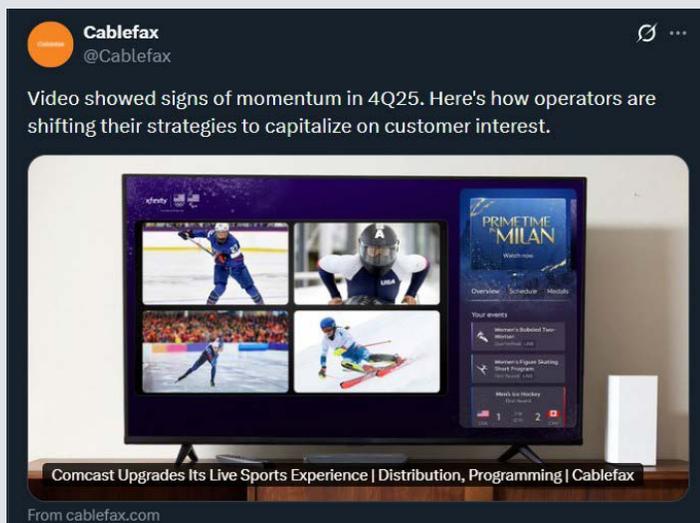
The 2026 Winter Olympics are underway following Friday's Opening Ceremony. **NBCUniversal** is the exclusive U.S. [broadcaster](#) of Milan Cortina, but **CNN** is also bringing live, on-the-ground reporting and analysis from Italy. CNN Sports anchor *Amanda Davis* is leading daily coverage for the cable news net. Also on the ground is anchor and correspondent *Coy Wire*. Coverage will air across CNN's linear and digital platforms.

**PROGRAMMING**

**CNN** and **National Geographic International** are releasing a four-part original series, "Disaster: The Chernobyl Meltdown," which chronicles the 1986 disaster. The first two episodes premiere on CNN on March 1 at 9pm, the other half releasing the following week. The series will hit CNN's DTC streamer following the linear run. – Starting Saturday, **HBO Max** will be the new streaming home of fan-favorite comedy series "Schitt's Creek."

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Video showed signs of momentum in 4Q25. Here's how operators are shifting their strategies to capitalize on customer interest.

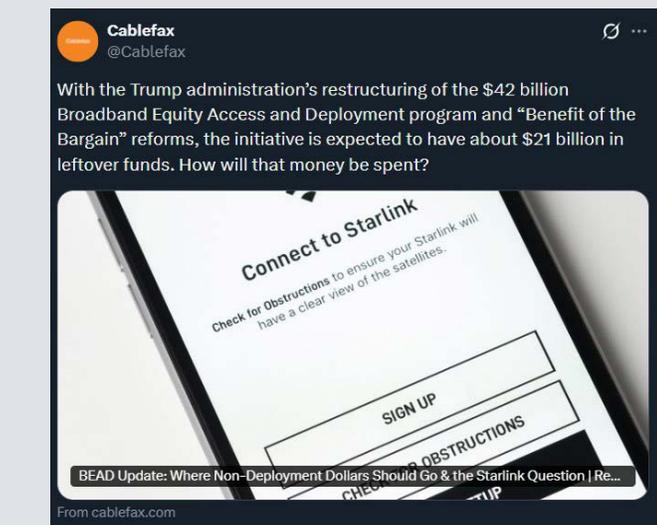
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**Quotable**

*"We had four incredible top executives with Jimmy Pitaro and Alan Bergman, Dana [Walden] and Josh [D'Amaro]. Dana brings, obviously, the background, the experience from TV, from Hollywood, from overseeing the streaming businesses with Alan. They've both been incredible executives and... if you think about what is the heart of the Disney company, it's the creativity. It's this amazing IP that's been produced over decades, going back to Walt, and the storytelling that comes from that creativity. I think Dana, working with Josh and ensuring that the best creativity permeates all of our businesses, is what we wanted."*

- **Bob Iger** on **CNBC** regarding **Dana Walden's** appointment to **Disney President & CCO**



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With the Trump administration's restructuring of the \$42 billion Broadband Equity Access and Deployment program and "Benefit of the Bargain" reforms, the initiative is expected to have about \$21 billion in leftover funds. How will that money be spent?

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 **Up Ahead**

- FEB. 10:** [Senate Commerce Hearing on Broadcast Media Ownership, D.C.](#)
- FEB. 16-18:** [NCTC Winter Educational Conference, Las Vegas](#)
- FEB. 18:** [FCC Open Meeting, D.C.](#)
- MARCH 3-5:** [ACA Connects Summit, D.C.](#)
- MARCH 5-6:** [Convergent TV World, NYC](#)
- MARCH 12-18:** [SXSW, Austin](#)
- MARCH 23-26:** [Cable Next-Gen, Denver](#)