

Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

Timeout: Comcast Goes to the Mattresses with Scripps

While **DirectTV** and state AGs argued in court Tuesday that **Nexstar-Tegna** would have a devastating effect on retransmission consent fees, a rather surprising retrans spat entered its second week.

Scripps stations have been [dark](#) on **Comcast** since March 31. There have been a few times Comcast has gone down to the wire with a large broadcast group (Nexstar in 2022 and **Sinclair** in 2007), but we can't find any big disruptions. Comcast's actual blackouts typically have involved cable nets, with most of those sports focused. For example, the 2023 one-day **NFL Network** blackout or its **MSG Networks** blackout that has persisted since 2021.

In other words, this isn't like **DirectTV** or **Dish**, which have had much more frequent retrans squabbles over the years. In fact, Dish has been without 226 Gray Media stations since March 10 and DirectTV has been without **Morgan Murphy** stations since March 7.

As for Scripps, it has only had a few blackouts over the years, most notably a spat with Dish that lasted more than a month in 2020. So, what's going on this time?

Both sides have stuck to the usual statements about fair prices and reasonable offers, but the big change since the last time they negotiated a deal is that Scripps has been aggressively expanding its sports portfolio, particularly in the wake of the **Main Street Sports** meltdown. Just yesterday, Scripps

added a multi-year media rights deal for the **NHL's** Nashville Predators, which join similar media rights deals for the NHL's Tampa Bay Lightning, Vegas Golden Knights, Florida Panthers and Utah Mammoth.

"Scripps is demanding all of our customers pay for sporting events that only a very small number of them will watch. Our intention is to provide our customers with these stations, and we are working very hard to reach a fair agreement with Scripps," Comcast said.

Scripps said it has been negotiating in good faith and that Comcast rebuffed an extension that would have kept signals available while talks continued. Notably, Scripps' WSFL and WHDT were in the midst of broadcasting the NHL's Panthers-Senators game when the blackout started last Tuesday.

The New RSNs?

Broadcasters, including Nexstar, have been vocal about increasing their sports stakes—but sports rights cost big money. With retransmission rates already a battleground, broadcasters run the risk of recreating the RSN model. Comcast has drawn a thick line in the sand for regional sports, spending the past few years moving RSNs to its more expensive Ultimate TV package (or dropping those that refuse to walk the plank).

In the ongoing Dish-Gray Media fight, it's worth noting the broadcaster has struck deals to carry **MLB** games from the Washington Nationals, Atlanta Braves, Minnesota Twins, the Athletics and the Cincinnati Reds and it's been snatch-

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ing up other rights, with its KPDX becoming the home of **WNBA's** Portland Fire and **NWSL's** Portland Thorns. More than 80% of Gray markets are now airing at least one local professional sports team in addition to collegiate and high school sports.

The ability to go after sports rights is one of the arguments for loosening broadcast media ownership rules. And there could be more sports migrating to broadcast with the **FCC** opening a proceeding on the sports media marketplace and how changes have impacted broadcasters and consumers. Broadcasters have called out the increased costs caused by fragmentation and the wave of sports to streaming platforms, as well as their belief that broadcast remains the most accessible platform for fans.

Lawmakers Focus on Disney in Sports Docket

This week, Sen. *Elizabeth Warren* (D-MA) and *Patrick Ryan* (D-NY) piled on, filing a letter in the FCC docket that brought up concerns over sports migrating to streaming services. They have a laundry list of issues that primarily center on **Disney**, from its acquisition of **Fubo** after **Venu** fell apart to **ESPN's** deal to acquire **NFL Network**.

“Disney already plays an outsized role in the distribution of sports content via broadcast, MVPDs, vMVPDs and direct-to-consumer streaming options. The NFL, in turn, controls the rights to the most valuable portfolio of live sports entertainment in the country,” they wrote. “By consolidating the production, operation, and distribution of the NFL Network under ESPN, while simultaneously granting the NFL a 10% stake in ESPN itself, the deal raises concerns of conflicts of interest and potentially disadvantages competing networks, streaming competitors, and distributors.”

The lawmakers also point to ESPN's absorption of NFL Fantasy into ESPN Fantasy, saying it knocks out its primary fantasy football competitor. And they have concerns over last year's deal to fold **MLB's** 34 out-of-market platforms into ESPN's direct-to-consumer streaming service. What's more, they said ESPN will determine the retail price for the **MLB.TV** offering, with no commitment to keep the price the same for existing subs past the 2026 season.

Warren and Ryan conclude by declaring that the FCC has broad authority to promote competition and protect against media consolidation, which includes a duty to review certain transactions to ensure they serve the public interest. “The Supreme Court has recognized that the Commission's authority covers new and rapidly developing fields, and its rules address public protection against... consolidation,” they wrote.

NEXSTAR-TEGNA'S DAY IN COURT

Nothing we heard during Tuesday's hearing over **Nexstar-Tegna** offered much hope that the judge *Troy Nunley* wouldn't turn the temporary restraining order against the two combining into a preliminary injunction, but we're still waiting for the order. Antitrust lawsuits over the \$6.2 billion merger filed by **DirectTV** and eight state AGs have been combined. During the hearing in Sacramento, we heard that Nexstar-Tegna wants the MVPD and states to cover a \$150 million bond for the “significant losses” they've already incurred due to the legal wrangling. Counsel for the states and AGs argued that Nexstar-Tegna has provided no support to substantiate that amount, alleging that any losses were the result of them rushing to close the deal in a move they characterized as highly unusual. Less than 15 minutes after the FCC approved the merger, Nexstar said it had closed the deal. **New Street's** *Blair Levin* noted that Nunley spent a great deal of time during the hearing on the bond discussion, which “would not be necessary if the judge were not likely to issue the preliminary injunction.”

AMC NETWORKS GET A NEW NAME

Some brands make a big fanfare when they change their names, while **AMC Networks** slipped it into an 8K filing after the bell today. Going forward, the content player will call itself **AMC Global Media**. “Our new name reflects the ongoing transformation of our business into a global media and studio-driven company, with streaming out front as our leading source of domestic revenue,” CEO *Kristin Dolan* said in a statement to **CFX**. “AMC Global Media produces and curates high-quality content and distributes it to viewers around the world through a variety of platforms and partnerships.” When it comes to its presence outside the U.S., the company reaches subscribers in more than 100 countries and territories around the world, with networks and streaming services that program in more than a dozen languages and produce approximately 1,000 hours of original content, including live sports. AMC Global Media is headquartered in the U.S., with international operations in Iberia, Latin America, Central Europe, the U.K., Australia and New Zealand.

SHELL OUT AT PARAMOUNT

Jeff Shell is leaving **Paramount Skydance** less than a year after he was appointed president of the company. **PSKY** confirmed Shell's exit, including from its board. This follows an investigation into whether Shell leaked confidential, nonpublic company information to *R.J. Cipriani*, who alleged in a lawsuit filed against Shell that the exec disclosed Paramount's **UFC** rights deal before

the transaction was announced publicly. Cipriani is also suing Paramount and its board. Shell has called Cipriani's claims false. In its statement, PSKY said that it "conducted a complete and thorough review of the allegations" and found that "the facts demonstrated that these allegations do not establish a securities law violation." The company said Shell "elected to transition from his positions" to focus on the lawsuit.

ARTEMIS II CABLE COVERAGE BY THE NUMBERS

The Artemis II launch last week didn't just bring the views to **NASA's streaming channels** but also to the cable news nets covering the mission. **Charter's Spectrum News** said it saw larger **Nielsen** viewership increases than **ABC, CBS, NBC, FOX, CNN, Fox News** and **MS Now** on **Spectrum News 13** in Orlando (+531%) and **Spectrum Bay News 9** in Tampa (+391%). Coverage from those two nets, which included on-site reporting from the Kennedy Space Center, also generated 12.2 million views across Facebook and Instagram. Meanwhile, **CNN's** special coverage last Wednesday pulled in 1.685 million P2+ and 334,000 P25-54 from 5-7pm, with coverage peaking at takeoff, delivering more than 2.7 million among P2+ in the 6:30pm quarter-hour. **Fox News** drew 3.6 million million viewers from 6-6:30pm, leading NBC (2.8 million), CBS (2.2 million), CNN (1.9 million) and MS Now (1.3 million). **C-SPAN**, which isn't rated, saw a nice boost on its social channels, including on TikTok. Its video of the Artemis II crew speaking to President *Trump* had 1.9 million views on the platform.

MINT TAKES SHOTS AT CABLE

T-Mobile-owned MVNO **Mint Mobile** launched a \$45/month 5G home internet and unlimited wireless bundle. An upfront payment of \$540 for 12 months and auto-renew is required for the deal. Customers can also add a second unlimited phone line for an extra \$15/month (a.k.a. \$720 total upfront). Mint is pitching the colorfully named "Unf*! Your Bills" bundle as a new way to "remove the usual Big Cable nonsense" and "give people a better, simpler and more affordable alternative." It's giving a five-year "no bill creep" guarantee when customers switch to Mint. "Cable companies have mastered the art of making simple things complicated and expensive," Mint Mobile Home MINTernet GM *Scott Venuti* said. "We've mastered the art of doing the opposite. And occasionally making jokes about it." The jokes include a new ad campaign featuring *Ryan Reynolds* and *Marie Kondo* "taking on the frustration of cable bills."

MEN'S NCAA NUMBERS

Michigan's defeat of UConn on **TBS, TNT, truTV** and **HBO Max** on Monday averaged 18.3 million viewers, making it the most-watched Championship Game since 2019 and the most-watched ever on **TNT Sports**, up 23% vs the 2024 game on TNT. The

Men's Final Four averaged 14.2 million viewers, up 11% vs. 2024. Overall, the 2026 NCAA Tournament across **TBS, CBS, TNT** and **truTV** averaged 10.9 million viewers, up 7% vs. last year, and the second-most watched Tournament since 1994.

WICT'S WOMEN OF THE YEAR & WOMEN TO WATCH ARE...

The **WICT Network** announced the 2026 Women of the Year and Women to Watch honorees. **NBCUniversal** President, Advertising and Partnerships *Karen Kovacs*, **AMC Global Media** CTO/Global Head of Media Operations *Stephanie Mitchko* and **Sinch Emergency Services** COO/GM *Chandy Ghosh* are being honored as Women of the Year. This year's Women to Watch are **Spectrum Reach** SVP, Customer Experience and Automation *Mary Pouliopoulos*, **Warner Bros. Discovery** Chief Global Marketing Officer *Karen Bronzo* and **Tech Mahindra** VP, Strategy and Growth *Pooja Jugran*. Honorees will be recognized during the Signature Awards Luncheon on May 12 at Cipriani 42nd Street in NYC.

FOX'S KALSHI DEAL

Fox Corp. inked an agreement to incorporate **Kalshi's** prediction data into its news, sports and entertainment content across **Fox News, Fox Business, Fox Weather** and the **Fox One** DTC streamer. As part of the sponsored integration, Kalshi will provide forecasts across political, economic and cultural events as well as work directly with Fox production teams on real-time data visualization. Fox is the latest programmer to link with Kalshi, which also has deals with **CNN** and **CNBC**.

FIBER SEES UPSTREAM USAGE GAINS VS DOCSIS

A new analysis from **OpenVault** found that average fiber upstream usage exceeded 100 GB for the first time and the upstream usage gap between fiber and DOCSIS subscribers "widened dramatically" in 1Q26. Average upstream on fiber networks was 106.7 GB, 87.4% higher than the 56.9 GB consumed by DOCSIS subs. Additionally, the average provisioned upstream speed of 556 Mbps on fiber was 1,187.4% faster than the 43 Mbps on DOCSIS networks. Average total usage for fiber was 943.4 GB vs DOCSIS' 720.5 GB—a 30.9% difference. The firm will share more details in its 1Q26 OVBI report in May.

FIBER FRENZY

Charter expanded its Spectrum network to the Missouri counties of Jefferson, Audrain and Cape Girardeau. In total, it's connecting over 3,860 homes and businesses in previously unserved or underserved areas of the state. The operator also launched in Sabine, Rusk and Panola Counties in Texas, bringing online more than 7,400 addresses.

USF’s Administration Problem

For the last few years, certain communications practitioners have been quite animated over the need to fix the FCC’s Universal Service Fund (USF), focusing solely on the contributions side of the equation (i.e., the money collected from telecom companies, and ultimately consumers). This perspective, however, disregards claims of questionable management and overspending within USF, especially the relationship between the FCC and the Universal Service Administration Company (USAC). Policymakers should be clear: no USF changes will happen without fixing its administration (and distribution) to ensure Americans’ money isn’t allowed to go down the proverbial drain.

One need only examine the concerns raised about USAC to realize that the entire USF administrative system is built on a fragile foundation. While many FCC chairs have been hesitant to address USAC’s core issues, lawsuits challenging USF and USAC’s role in the program are likely to continue. Many of us opposed last year’s key Supreme Court case over the sudden risks it posed to recipients, but that’s a far cry from saying everything is copacetic.

To understand the concerns with USAC, it is important to realize that the FCC effectively “created” it out of thin air. Dare anyone to cite the statutory authority—much less identify one conversation or approval by congressional authors of the Telecom Act—that blessed the FCC to create a quasi-government, non-profit Delaware corporation to oversee Federal USF. As such, the debate over USAC’s legitimacy has been seen by many as tainted from its beginning. Asking Congress today to ignore this past maneuver as part of USF reform seems like a bridge too far, even for the more supportive representatives.

That gets to the largest problem with USAC: given its structure, it is technically not accountable to anyone. Sure, FCC chairs have some control and influence over its CEO, but there is no contract between the government and USAC that establishes any performance or accountability standards. That’s the difficulty of a quasi-governmental structure: it is neither fully government nor fully non-government, leaving persistent, unnecessary gaps in responsibility. Arguably, the FCC could threaten to dismiss or abolish USAC, but such a move would likely be questionable and prompt years of litigation.

Do we know whether USAC is doing what should be expected for a \$9-11 billion fund? We only have USAC’s word. Could others do better or cheaper? No one knows for sure. Previously, other parties have expressed interest in bidding and serving as the USF administrator, arguing that their companies could deliver a higher-quality workload at a lower overall cost. Yet here, the traditional contract structure that governs almost every aspect of federal procurement practices for goods or services doesn’t apply to the mainstay of USF. There is no justifiable reason why USF must be administered exclusively by USAC.

This level of control has created a difficult predicament in which necessary information and documents are not readily available from USAC. No matter whether it is members of House or Senate authorizing committees or mealy

FCC Commissioners conducting appropriate oversight, it is my personal experience, from both perches, that it can be extremely difficult to get the required, timely or helpful information from USAC. Further, talk to anyone who has found themselves in the throes of an inquiry or penalty action by USAC about their experience. Collectively, this hampers proper oversight of USF and, importantly, of USAC itself.

Not surprisingly, there have been concerns raised over the years about whether USAC always stays on the right side of the ministerial line. This was a theme raised early in the Supreme Court case. Without a clear delineation between policymaking to be decided by the FCC and the traditional administrative functions delegated to USAC, recipients can be confused and waste valuable time trying to determine who has a say on a particular aspect or function.

On the flip side, USAC is hamstrung by troubling FCC mandates. For instance, its board, as selected by the FCC, is composed of specific categories of entities, many of which are major USF recipients or regulated entities. By its very nature, there is a strong appearance of a conflict of interest. Where are the independent board members evident in private companies? Not included. Are ratepayers represented? Ahhh, no. Why shouldn’t the USF administrator be allowed to select board members who best serve the company and the functions charged by the selected role?

Similarly, USAC has limits on how much it can pay its CEO. Should the American public care how much compensation USAC’s CEO receives, as long as they do the job well? In fact, shouldn’t the CEO be reasonably compensated to ensure strong performance outcomes? CEO compensation limits are visually appealing but reduce the talent pool.

Congress has shown a recent willingness to reshape USAC through new legislation. Just last year, draft bills in the House and Senate could have forced the privatization of USAC’s functions. Combined with other administrative reforms, USF could be on a much stronger legal footing going forward.

Former FCC Chair Tom Wheeler, who declined to make substantial changes to USAC, used the phrase “table stakes” to refer to minimum requirements for certain policy debates. In this context, administration restructuring must be table stakes for USF reform by Congress.

(Michael O’Rielly is a former FCC Commissioner and congressional staffer who serves as President at MPO-Rielly Consulting. His views do not necessarily reflect the views of Cablefax.)

