

## DID YOU KNOW?

Telgoo5 is a funny name, but there's some thought behind the cloud-based SaaS telecom platform provider's moniker. It signals the transition from traditional copper telephony—"tel" to the new IP world of Google "goo." The 5 represents its five tenets product, process, people, placement and ultimately performance. Put it together, and you get Telgoo5.

## MIDCO'S BLUEPRINT FOR ADDING WIRELESS

When **CFX** named **Midco** its [MSO of the Year](#) in 2024, the South Dakota-based operator was already quietly building toward one of the more significant expansions in its 95-year history. Mobile was on the roadmap, with a target launch of 4Q25 or 1Q26. The timing reflects a broader inflection point for regional broadband operators, many of whom are watching mobile become central to their growth strategies—and in some cases, their survival.

The numbers make the case. In 4Q25, cable mobile wireless providers accounted for one out of every three new wireless customers in the US. **Charter**, **Comcast** and **Optimum** now collectively hold roughly 21 million mobile lines, and the momentum isn't slowing. Comcast had its best-ever quarter for mobile in 1Q26, with 435,000 net additions—up 35% YOY. After it added 368,000 lines in 1Q26, **MoffettNathanson** noted that Charter now has 44% as many wireless lines as it does broadband households. For regional operators still on the sidelines, those figures are hard to ignore.

Midco's announcement at the end of April that **Midco Mobile** is available across its footprint landed just shy of its original target window. Midco President and COO *Ben Dold* told CFX he wouldn't have done anything differently though.

"The integration work, it always takes a little bit longer than what you'd expect. We wanted to ensure that the Midco mobile experience matches the Midco fiber broadband experience," he said. "The experience itself was really good in terms of the effort of standing up the platform, integrating it and then, we took a very intentional approach to the team member trial."

### Churn Tool or Revenue Driver?

Operators new to mobile sometimes view it primarily as a churn reduction play rather than a meaningful ARPU opportunity. Midco sees it as both. "Honestly, we had been hearing from our customers that they were frustrated with the complexities of the national carriers and wanted something that was simple and straightforward, that could add value at an affordable price," Dold said. "We think that it resonates both on the acquisition side with new broadband and mobile customers, as well as certainly adding value to our existing broadband customers, and hopefully them wanting to stick around with us for a long time."

Midco is offering existing customers a by-the-gig plan starting at \$15/month and an unlimited talk, text and data plan for \$30/month with a three-year price lock.

### Building the Vendor Stack

Midco isn't publicly disclosing its MVNO carrier partner, though it's [reportedly AT&T](#). For the technology and operations layer, it tapped **BlueConnects** as its mobile virtual network aggregator—handling carrier network access—and **Telgoo5** as its MVNE platform, managing billing, lifecycle management and digital commerce integra-

tion (both have the same ownership structure). For now, mobile billing remains separate from its other services.

Dold noted that the level of integration an operator plans to pursue with its mobile product will drive a lot of the decision-making when selecting a stack. While Midco chose to go a bit slower with its launch, Telgoo5's typical implementation is somewhere around 90-120 days.

Long-term fit was Midco's primary criterion. "Our industry is built on these longstanding vendor partner-operator relationships. So, we were looking for someone that could really partner alongside us to help build the product that fit with our brand, fit with our customer experience commitments, not just for the near term, but for the long term," Dold said.

### A New Choice for NCTC Members

For the hundreds of smaller and mid-size operators that are members of the **National Content and Technology Cooperative** (NCTC), the vendor landscape recently got more interesting. NCTC offers its members an MVNO solution built on AT&T's network, and until recently, **Reach** was its only MVNE option. In March, NCTC struck a deal to add Telgoo5 as a second option—giving operators a choice in how they build and operate their mobile product.

Midco went direct with Telgoo5 before that deal was in place. "Telgoo5 wasn't an option through NCTC when we did our deal. We were excited to hear the news that they had inked a deal as well, and that's certainly something we're going to dig into the details on and see what's right for us in the long term," Dold said. "We have a tremendous amount of respect for the NCTC and what they do, and they add a lot of value. For us, it was really first and foremost just picking the right partner, and Telgoo5 was that for us I think operators have a couple of different options through the NCTC, and I think there is real value in what that team brings to the equation in helping operators stand it up."

NCTC members are already signing contracts with Telgoo5 and integration has started, according to Telgoo5 Chief Strategy Officer *Stuart Chowning*. "We're expecting the full integration to be complete later this summer, while simultaneously bringing up some of these member companies," he told CFX, noting that NCTC has made it so the MVNO offering can scale to its largest and smallest members. The firm is also working with fiber providers, WISPs and other broadband operators that are looking to add mobile. "Those fiber guys are absolutely launching wireless to complete the bundle for the same reason that the MSOs are doing it," he said.

### Internal Launch First

One of the more distinctive elements of Midco's approach was the rigor it applied to its internal rollout before going to market. Dold was the very first employee to port his number in March 2025, and the company spent four to five months gradually expanding the trial across its team.

"I took it on the road and visited all of our sites across the footprint and showed the team my phone with Midco Mobile on it and just shared my experience—'Hey, this works just like your national carriers work and everything you want to

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do with your mobile service you can do with ours,” Dold said. “One of the goals we had when we started was that we’re going to treat the internal rollout with the same care as the external rollout, because this is a big change for the team. We want to make sure that they are fully on board and understanding of what we’re doing and why we’re doing it, how their role fits in, what it means for our customers.”

For operators considering mobile, Dold recommends investing in that internal excitement well ahead of any public launch. Frontline sales teams with firsthand experience become the most credible salespeople when the product hits the market.

### Summer Marketing Push Ahead

Midco Mobile started in a soft launch phase, with a broader marketing campaign set to begin this month. To anchor the campaign, Midco signed former **NFL** linebacker *Chad Greenway*—a natural fit given his long tenure as a Minnesota Viking and Midco’s ongoing expansion in the West Metro Minneapolis area, including its recent acquisition of Minnesota provider **SCI Broadband**.

The early sales results, driven entirely by employee touchpoints rather than paid marketing, have given Dold confidence in what comes next. “The mobile lines we’re selling now, we’re selling them because of Midco team members having a conversation with a customer, and they’re seeing the value in switching their service,” he said. “That gives me tremendous confidence that when we turn the marketing machine on and drive awareness and understanding of the price points and the value proposition, I think all the good work that we’ve done over the last several months to get our teams ready is really going to pay off.” - *Amy Maclean*

## CAN OPTIMUM CLIMB OUT OF A PIT OF DEBT-SPAIR?

Part of **Optimum**’s multiyear turnaround playbook includes untangling the web of debt it’s built over the years. The operator took a big step toward mitigating the matter Monday following a string of transactions that are meant to protect its healthiest assets in the event Optimum’s wholly owned indirect subsidiary, CSC Holdings, fails to reach a settlement with creditors. Leading the moves was the creation of an unrestricted subsidiary called CSC Investments II, which will hold the Optimum East cable business and 50.01% stake in **Lightpath**. Optimum hopes that will allow CSC Investments II to raise more capital while protecting Optimum East’s cable operations from the ramifications of a future default. At the same time, Optimum sold \$300 million worth of preferred ownership stakes in the newly formed subsidiary to institutional investors, using an additional \$200 million to buy shares from **Next Alt**, the personal holding company of Optimum founder *Patrick Drahi*. CSC Investments II also initiated a tender offer to purchase up to 120,000,000 shares of Optimum Class A and B common stock at a price of \$2.50/share. The offer is slated to expire June 30 at 5pm ET. The cloud hanging over Optimum’s debt is stormy. CSC Holdings has \$21.8 billion in outstanding debt, with \$6.2 billion set to mature in 2027—\$4.1 billion of which is due in April. What makes matters more complicated is the [legal battle](#) with nearly all of CSC Holdings’ creditors. Optimum claims **Apollo** and other private equity firms colluded to block the operator from restructuring debt. It stems from a June 2024 Co-Op Agreement that requires Optimum to reach a debt restructuring settlement with all creditors, instead of being able to pay off one at a time. Optimum is confident the string of adjustments puts it in a better spot to settle its debt, and so does **New Street Research**. “With the creditors now having recourse to only the Optimum West footprint (**Suddenlink**), they are probably better off going back to the negotiating table. This increases the odds of an agreement between Optimum management and creditors,” NSR wrote, adding that the boost of capital from Drahi and other investors helped Optimum’s stock finish up 76% on Monday.

## SCRIPPS DARK ON DIRECTV

**DirectTV** lost **Scripps** stations Sunday around 7pm ET after the two were unable to agree on a new retransmission pact. Only local stations are impacted, meaning if the blackout stretches to Friday, viewers will still be able to watch **WNBA** action on national network **ION**. The blackout involves 54 stations in 36 DMAs. Earlier this month, Scripps completed some [station swaps](#) with **Gray Media**, and it looks like those stations aren’t included in the blackout. The spat comes shortly after Scripps and **Comcast** reached a deal following a five-week blackout. DirectTV has been without Griffin Media-owned **CBS** and **CW** stations in Oklahoma City since May 1. Last month, **Morgan Murphy** stations returned to its lineup after a 10-week blackout.

## COX MOBILE SPOTLIGHTS AI LITERACY NEED

During National Safety Month, **Cox Mobile** is highlighting the growing need for AI literacy, including among older adults who are using this tech. According to the provider's research, 53% of seniors now use generative AI in their personal lives. Notably, 42% of seniors who use GenAI say they rely on it to learn new things or figure something out, underscoring how important it is that older users are able to spot misinformation and other red flags. Seniors identified online shopping and deep fakes as two major concerns when it comes to online safety, with multiple generations, including the sandwich generation that uses AI at an even higher rate, revealing they have encountered misinformation and disinformation in the past year. To support safer digital experiences, Cox Mobile is providing online safety [resources](#) and a few quick tips for when a user encounters suspicious information online.

## NAD SIDES WITH CHARTER, BUT HAS SUGGESTIONS

**Charter** has recently been running Spectrum advertisements claiming that customers "will receive free high-speed internet forever, with the purchase and maintenance of four mobile lines." While **AT&T** lobbied a challenge to the **National Advertising Division**, the **BBB** program sided with Charter and said the claim was supported, though it still recommended that Charter modify parts of the "free internet forever" offer to disclose its material terms. NAD backed Spectrum's claim "because consumers pay the same price for mobile service whether or not they receive the free internet offer." However, NAD said clear and conspicuous disclosure of material terms is needed when a service is being offered for free so that consumers understand the nature of what's being advertised. In this case, NAD told Charter that it should disclose that eligibility for "free internet forever" requires four qualifying **Spectrum Mobile** lines, some of which must be switched, transferred or ported from another carrier and that a one-time installation charge and other fees may apply. Additionally, NAD said Spectrum should direct consumers to a readily accessible source where terms are available. Charter said it'll comply with NAD's recommendations.

## ROKU, YOUTUBE READY FOR WORLD CUP

**Roku** will launch a centralized hub for the 2026 **FIFA World Cup** called Soccer Zone. It'll be the one-stop destination for Roku users to find live and upcoming matches on **Fox One** and **Peacock**, highlights, scores and states and other coverage during the tournament, including FAST channel programming. Customers can also favorite specific teams they want to follow and opt in for reminders on their mobile devices. The Roku Channel is also offering a 3-day free trial to Fox One, which will stream all 104 matches from June 11-July 19. Customers who don't yet have a Roku device can take advantage of a bundle that includes a Roku Streaming Stick Plus and 30-days of Fox One for \$24.99, which the company says is a savings of 58%. – YouTube is also lacing up its boots ahead of kickoff. Fox One is now available on its Primetime Channels streaming store, with Peacock also coming soon, meaning users can subscribe to both through YouTube. The Google-owned video platform's ties to the World cup run deeper than that, though: it's also the "preferred platform" of the tournament, allowing media partners to stream select matches in full on their YouTube channels and publish highlights, behind-the-scenes footage and short-form vids. A group of YouTube creators will also receive access to matches to produce World Cup content.

## CARRIAGE

**Fox News'** FAST weather service, **Fox Weather**, is expanding to **SiriusXM** on June 3, just in time for the official start of the Atlantic hurricane season (June 1-Nov. 30). The channel will be offered to subscribers via the SiriusXM app and in compatible vehicles and radios. During major weather events, it will be offered as a free-to-air service on the platform. -- **Walmart+** subscribers who select **Peacock** as their video streaming benefit can now upgrade from the existing Peacock Premium plan to the almost ad-free Peacock Premium Plus tier for \$6/month (plus taxes/fees). Premium Plus customers can also watch a live feed of their local **NBC** station and download Peacock content for offline viewing. Walmart+ users have been able to select **Paramount+** or Peacock for no additional cost as their streaming option since September 2025.

## PEOPLE

**Starz** is getting a new Chief Legal and Strategy Officer next week. *Jim Kapenstein* is making the switch after a 28-year stay at **Disney**, most recently serving as Deputy General Counsel since February 2020. Kapenstein—a rare dual-Michigan and Ohio State graduate—will be based in Santa Monica and report to Starz President/CEO *Jeffrey Hirsch*.