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WHAT THE INDUSTRY READS FIRST

## Another Look: SpaceX, LTD Get Little Support for RDOF Review

**SpaceX's Starlink** and **LTD Broadband** aren't letting the **FCC** pull back their RDOF funding that easily, but neither company is receiving much support in the relevant dockets. More than two weeks ago, the FCC rejected the long-form applications of both service providers after determining they could not deliver the service they promised through their winning bids. LTD was set to take home more than \$1.32 billion in subsidies while Starlink won more than \$885 million.

Starlink did have one ally show up to the fight, with **TechFreedom** calling the FCC's decision arbitrary and capricious in comments posted Tuesday. The nonprofit think tank acknowledged that Starlink's constellation is not fully deployed, meaning the service is not currently operating at its full capabilities. Approximately half of SpaceX's first generation of satellites have been deployed with the hope being that as many as 42,000 satellites will ultimately be allowed to fly. "But to label it as 'nascent' reflects a lack of understanding of the suite of technologies involved in deploying such an extraordinary system, in which mass-produced satellites, launched at a fraction of the traditional costs, use varying frequency bands to drive down costs and provide true broadband and low latency," TechFreedom said. "How can the FCC pull all funding for Starlink based on current speed tests for a system that is not yet fully built, and for which deployment, speed, and latency milestones don't apply for several more years?"

Turning to the other side of the comments, the **Ensuring RDOF Integrity Coalition** opposes the applications for review from SpaceX and LTD and has requested the Commission hold both in abeyance until it opens new dockets to facilitate public review of all relevant materials. Multiple commenters also took issue with their inability to thoroughly consider the arguments of SpaceX and LTD because of the heavy redactions that dominated their documentation.

"The public version of the SpaceX AFR contained substantial redactions with several pages of the pleading and declarations redacted nearly in their entirety. The LTD AFR was filed entirely confidential with no public version available. Furthermore, the AFRs' underlying materials, including the LTD and SpaceX Long Forms and the LTD and SpaceX Denials, are also unavailable to the public," ERIC said.

**Viasat**, which has fought against Starlink in a number of FCC dockets, filed an opposition claiming SpaceX's application for review mischaracterizes Commission precedent when it comes to reviews of long-form applications. The satellite company claims SpaceX repeatedly cited the Commission's discussion of short-form applications as proof of a heightened standard being imposed upon Starlink when it came time to approve funding. But the burden of proof is much higher on the long-form application, and it's at that point in the process where the Commission made the decision to pull the RDOF award back.

"The short-form application involves providing 'short, nar-

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rative responses' and 'preliminary design' information to establish performance tier and latency bidding eligibility (when the number and density of RDOF locations to be served is unknown). The long-form application, by contrast, requires a provisional winner to demonstrate its ability to serve the specific locations that it bid and won, taking into account their geographic density and other relevant considerations that would reveal limitations on the performance of the network proposed to be employed," Viasat said, adding the FCC had been clear in its doubts about the ability of any LEO satellite-based broadband service to deliver the type of connectivity it expected for RDOF program participants. "SpaceX participated in the RDOF Phase I auction with full knowledge of the risk that, if provisionally awarded support, it might well be unable to make the required showings in its long-form application."

**MOFFETT NATHANSON CUTS STARRY PT BIG TIME**

**MoffettNathanson** is nearly halving its target price for **Starry** from \$11 to \$6.50 in light of the broadband provider's ongoing financial struggles. It is maintaining its "Outperform" rating. Since its introduction to the market, Starry's biggest challenge has been its balance sheet. It had \$100 million in cash on its balance sheet and MoffettNathanson expects those funds to run out by the end of the year. "By our estimate, Starry will need to raise some \$600 million over the next three years, and \$1B over the next five," MoffettNathanson said in a Tuesday note. "This overhang creates what we described in our initiation report in June as a circular reference problem; with a stock price today that is less than one-fifth warranted value, the potential equity dilution from a capital raise at these

levels could be enormous (which, of course, would badly impair warranted value)." The firm continues to believe that Starry delivers a solid product that can generate good unit economics and profitability in the long run. But none of that matters with investors staying out of the picture until Starry comes up with a way to substantially improve its financial issues. "The fear of equity dilution has become a self-fulfilling prophecy; that fear has led to sustained selling, a lower share price... and therefore, what is now an unavoidable reality of dilution. Starry's cash burn rate makes this not just a major issue but... the only issue," it said.

**GOOGLE FIBER EYEING 100GBPS**

**Google Fiber** is ready to move faster on fiber. In a Tuesday [blog post](#), CEO **Dinni Jain** detailed plans for the provider to "dramatically expand" its multi-gigabit tiers in the coming months with the ultimate goal being delivering 100 Gig symmetrical internet. Jain also said he believes it isn't enough for a provider in 2022 to just focus on providing multi-gig service without considering the full consumer experience. Google Fiber is strategizing under the assumption that many, if not most, communities across the U.S. will have at least two or three fiber providers as well as an incumbent coax provider in the future. "The unique selling points will be how that network is built to deliver symmetrical multi-gig speed at accessible pricing—all with a focus on enabling service that takes advantage of that speed not just to the home but in the home, as well," he said. "And one that comes with an obsessive focus on providing the best customer experience possible at all points along the way."

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**KEEP 'THE WALKING DEAD' ALIVE**

Ahead of the final batch of episodes in "The Walking Dead," **AMC Networks** is partnering with the memorabilia marketplace Goldin to auction items from the series. Starting today and through Oct. 15, items available for bidding include Daryl Dixon's Classified Moto, the wooden baseball bat "Lucille" and Michonne's katana. The third part of Season 11 begins Sunday at 9pm on **AMC** and **AMC+**.

**RATINGS**

**ESPN's** Week 4 edition of "College GameDay" averaged 1.94 million viewers and 2.6 million for the final hour, up 21% from the Week 4 show in 2021. Wisconsin vs. Ohio State on **ABC** averaged 4.6 million viewers, making it the second most-viewed game across all networks this week. Kent State and Georgia marked a new record for ESPN+ as it became the most-watched college football game on the platform ever. It's not just football that's seeing viewing success. ESPN and **ESPN2's** "Sunday Night Baseball" telecasts of the Boston Red Sox and the New York Yankees averaged 2.2 million viewers prior to a rain delay, peaking at 2.77 million during the 7:45pm-8pm window. That mark makes it the second-largest Sunday Night Baseball audience this season. Those numbers helped ESPN sit atop the P2+ prime ratings for the month of September. The sports network reeled in an average of 2.42 million viewers, edging out **Fox News'** 2.13 million. **MSNBC** followed in third with 1.23 million, with **HGTV** and **USA Network** closing the top five with 868,000 and 744,000, respectively. Fox News did come out No. 1 for the month's total-day ratings at 1.41 million as ESPN (917,000) and MSNBC (791,000) followed behind. **CNN** (580,000) and **HGTV** (473,000) completed the top five. Fox News did unseat ESPN following a three-week reign at the top of primetime ratings. FNC logged 2.16 million viewers in prime for the week as it also took the total-day crown with 1.4 million. – **Spectrum News** garnered an average of 2.2 million daily viewing households across linear and digital platforms for the month of September, beating out the likes of **ABC, CBS, Fox** and **NBC** as well as **CNN** and **Fox News**. Coverage of *Queen Elizabeth II's* funeral on Sept. 19 saw an average increase of 25% across all markets from 5:30am-7am. Additionally, the launch of its local news connected TV app on **Apple TV** and **Roku** on Sept. 8 expanded access for customers.

**NEXTGEN TV FOR ROANOKE-LYNCHBURG**

TV stations in the Roanoke-Lynchburg market in Virginia began broadcasting with NextGen TV today. Those stations include WSET-TV (**ABC**), WDBJ (**CBS**), WWCW (**CW**), WSLS (**NBC**) and WZBJ (**Gray Television**). The ATSC 3.0-powered enhancements come with new emergency alerts, better video and audio quality and more.

**OWNING THE VOTE**

**OWN** is launching its "OWN Your Vote 2022" campaign to encourage Black women to vote in the upcoming midterms and advocate for those in their communities to do so as well. The initiative began in 2020 with the goal of showing voters the various ways they can participate. It saw over 250,000

women take part, helping lead to record voter numbers. This year, the campaign will focus on displaying the various impacts that the issues on ballots have on Black women.

**CARRIAGE**

Select **Comcast** or Xfinity markets will now have access to **FMC** starting today. The deal adds 5 million subscribers to the network's distribution, which includes **Dish, Frndly TV, Evoca** and **altafiber**.

**AT THE COMMISSION**

The **FCC** proposed new rules Tuesday aimed at fighting against malicious robocalls. The NPRM released by the agency seeks comment on applying caller ID authentication standards to text messages. Mobile wireless providers would be required to, at the network level, block texts that are from invalid, unallocated or unused numbers as well as numbers that are listed on Do-Not-Originate lists. The Commission is also looking for input on any other actions it should take to address illegal texts, including consumer education.

**ON THE CIRCUIT**

"Access Hollywood" co-host *Shaun Robinson* will host the 2022 [Walter Kaitz Foundation](#) Annual Fundraising Dinner at the New York Marriott Marquis. The event will take place Oct. 12 and raise funds to support equity and inclusion in media and entertainment.

**PROGRAMMING**

**Showtime's** four-part docuseries "Spector," which looks back at the relationship between *Phil Spector* and *Lana Clarkson* and the eventual fatal shooting that took place, will make its on-air premiere Nov. 6 at 9pm. It'll be released on streaming platforms and on demand Nov. 4. – "Black Ink Crew New York" will return for its 10th season Oct. 18 at 8pm on **VH1**. – College basketball teams were allowed to begin practicing this weekend, and **ESPN** is getting ready with a pair of midseason events. Minnesota and Virginia Tech will start the 2022 ACC/Big Ten Challenge on Nov. 28 at 7pm on **ESPN2**, followed by Pittsburgh vs. Northwestern at 9pm on the same channel. Then on Nov. 29, one of Syracuse vs. Illinois and Maryland vs. Louisville will be on ESPN at 7pm or 7:30pm, with the other being put on ESPN2 in the same timeslot. The event wraps up Nov. 30 as Duke hosts Ohio State on ESPN at 7:15pm before Boston College and Nebraska cap things on **ESPNU** at 9:15pm. For the 2023 SEC/Big 12 Challenge, all 10 games will take place Jan. 28, starting with Auburn vs. West Virginia at noon on ESPN or ESPN2. Other big matchups include Texas vs. Tennessee on ESPN at either 4pm or 6pm and Kansas vs. Kentucky at 8pm on ESPN.

**PEOPLE**

*Denise Bambi Kraus* is the new Chief of the Office of Native Affairs and Policy at the **FCC**, where she'll help with efforts to bring modern communications services to Native communities and oversee the Native Nations Communications Task Force. Kraus and her team will focus on the areas of mapping, access, affordability and sustainability. Prior to her appointment, Kraus was the National Tribal Affairs Advisor for FEMA.