

# Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

## No Worries: Sievert Says Cable Isn't Taking Share from T-Mobile

**T-Mobile** CEO *Mike Sievert* isn't too focused on the cable providers that are infiltrating the wireless marketplace, but that's not because their business plans aren't solid. It is just that those providers aren't taking share from T-Mobile, but from T-Mobile's competitors.

"For the last four quarters in a row, our reporting has actually stayed consistent or slightly improved versus cable. So you've seen this sort of change in their overall trajectory without seeing a change in porting ratios with us," he said during a fireside chat at the **JP Morgan** Global TMT Conference Monday. "So you kind of look at that and say well, what's really happening over there and is it affecting us and our business model deeply. That informs how we respond to it."

Sievert was somewhat critical of cable when T-Mobile reported its 1Q23 earnings, saying on the company's call that while cable may be reporting strong numbers when it comes to net adds, a meaningful portion of those are "low-calorie." He clarified at the conference that he didn't mean that as an attack on the integrity of the cable provider's reports, but to note that the telemetry is telling T-Mobile leadership that cable's movement isn't hurting the Uncarrier.

"Their model may be doing things that are important for their business and their success. I was just trying to point out it's not affecting ours and it's not destroying value in this sector because it's not really penetrating into the kinds of customers

that are not informing our value creation," Sievert said.

T-Mobile recently introduced its Go5G Plus plan, an offer that starts at \$90/month for one line and includes unlimited 4G and 5G data, 50 GB of high-speed mobile hotspot data, **Netflix, Apple TV+** and device upgrades every two years. It's one of the provider's premium plans and it has become one of its most popular. **Verizon** has somewhat moved away from including partnered services in with the price of its plans, and Sievert believes there can be value in offering customers a menu of services to add on rather than a pre-selected bundle. He's just not sure Verizon's way will be the right way.

"If Verizon had slashed their prices when they took out all these goodies and then allowed you to buy those goodies back that would have made more rational sense to consumers, but instead they just sort of took them out, didn't reduce the price and said look, we're giving you choice now," he said. "Consumers probably see through that. They're hoping consumers won't see through that, but we'll see.

There's a lot of talk about artificial intelligence out there, and Sievert's personal view is there is a lot of room for innovation in the wireless market when it comes to devices and different ways to use technology. The idea for the smartphone is now at least 15 years old, so change is likely a-coming.

"AI is showing us there's a better way to interact with our technology," he said. "Things are going to start moving in this industry and I think it's going to be very positive. But at the same time, big discontinuous things like AI are usually simul-

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taneously going to be more earthmoving than most people realize and affect things differently than most people realize and not live up to the hype in the next 24 months.”

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## GOMEZ GETS FCC NOMINATION

The congratulations came pouring in Monday after President Joe Biden nominated Anna Gomez to the FCC and renominated current Commissioners Geoffrey Starks and Brendan Carr. Now the question is whether Gomez can get confirmed by the Senate. Biden's former pick Gigi Sohn bowed out following an unsuccessful 18-month nomination process that included billboards decrying her selection. The FCC's Democrats achieving a majority doesn't just depend on Gomez. Starks will need to be confirmed before the end of the year. His renomination is a step in that direction, but the on-again, off-again debt ceiling talks are a reminder that nothing is a done deal in this Congress. FCC Chairwoman Jessica Rosenworcel offered praise to Gomez along with the desire to get the FCC to its full five-member position. “She brings with her a wealth of telecommunications experience, a substantial record of public service and a history of working to ensure the U.S. stays on the cutting edge of keeping us all connected. I wish her all the best during the confirmation process,” Rosenworcel said in a statement that also saluted colleagues Carr and Starks on their renominations. A Democratic majority would allow the FCC to move forward on issues such as adopting a Title II framework for regulating broadband, though **New Street Research** warns the process will take a while and may not be done before the 2024 election. Gomez is a telecom attorney who has previously served as **NTIA's** Deputy Administrator and has held various FCC positions, including Deputy Chief of the International Bureau. While she tweeted that she was deactivating her *Twitter* account in November, she returned to it Monday to [thank](#) Biden for the nomination: “I am humbled and grateful. If confirmed, I look forward to working with Chairwoman Rosenworcel and my fellow Commissioners to bring the benefits of modern communications to all.” As per usual, companies and associations—including **Charter**, **NCTA**, **ACA Connects** and **USTelecom**—issued statements congratulating Gomez and praising her deep bench of industry knowledge. “From the digital broadcast transition to spectrum issues, Ms. Gomez has expertise across the board,” said **Comcast** Chief Legal Officer Tom Reid. Consumer group **Public Knowledge** urged the Senate to move quickly on Gomez's nomination. “For far too long, the Biden administration and Senate leaders have left us without a full, five-person FCC while important issues are in front of the agency. Anna Gomez has deep, demonstrated experience working for the public on telecommunications and

technology issues. Her decades of experience in the telecommunications sector, most of those spent serving the public interest, will allow Ms. Gomez to get right to work at the FCC, which is critical to help the FCC move forward with its agenda of ensuring all people have access to communications services,” PK President/CEO Chris Lewis said in a statement.

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## SLING LATEST TO STRUGGLE WITH SPORTS STREAMING ISSUES

**Sling TV** left fans in the lurch Sunday night when technical challenges prevented many viewers from accessing programming, including Game 3 of the NBA Eastern Conference playoff. The problems were tied to both logging in to the vMVPD and being able to watch, with the service's support Twitter account reporting at 9:30pm ET that its engineers were working to restore service. A 10:53pm update gave customers the all-clear to move forward with their attempts to watch. It's not the only vMVPD to struggle during this round of playoffs. **YouTube TV** also missed a free throw last week when customers were left in a commercial loop that prevented them from catching the final moments of another showdown between the Miami Heat and the Boston Celtics.

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## PARAMOUNT+ WITH SHOWTIME TO DEBUT IN JUNE

On the eve of **HBO Max's** flip to just **Max**, **Paramount** announced a June 27 launch date for its combined **Paramount+ with Showtime** streaming service. It set the price tag at \$11.99/month, a \$2 increase for the current Paramount+ ad-free tier. The lower-cost tier Paramount tier will not feature Showtime, but will still see its price increase from \$4.99/month to \$5.99/month. The company plans to rebrand the Showtime premium linear network by year-end and will shutter its standalone Showtime app.

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## WELCOME TO THE CINEVERSE

**Cinedigm** will now be known as **Cineverse** as the company moves further into the streaming and technology world. It's the same name as the company's flagship streaming service that launched in September and reflects the direction it wants to head toward. Cineverse offers a proprietary Matchpoint custom streaming technology that presents a unified content management and analytics solution, on top of the more than 60,000 titles it has on the Cineverse streaming service. The company's stock symbol will also be changed from “CIDM” to “CNVS” starting Tuesday.

## COMCAST NBCU FOCUS ON AI

Today was the start of **Comcast NBCUniversal's** LIFT Labs Accelerator on Generative AI. The six-week program will have Comcast NBCU work with startups through in-person and virtual sessions to get better insight into opportunities within Generative AI. Participating companies will be announced once the program fully wraps up. Since the launch of LIFT Labs in 2018, over 80% of the portfolio companies secured a proof of concept, pilot or commercial deal with Comcast NBCU.

## NICK'S OUR WORLD LAUNCH

To help inspire and provide tools to empower its young viewers, **Nickelodeon** launched a new multiplatform initiative called "Our World" in the U.S. It consists of a coalition of partners that give resources and best practices for kid-driven philanthropic opportunities. A key component will be the digital destination, which connects kids, parents and caregivers to developmentally appropriate activities. Nickelodeon will also use proprietary research on youth agency in kids under 13 years of age to create a recurring newsletter for youth-serving organizations. Our World will launch in the U.K. and Mexico later this year and in additional markets come 2024.

## OPENVAULT NABS PATENT

**OpenVault's** patent application for assisting cable and fiber broadband providers to identify and apply targeted policies was approved Monday. The patent builds a framework for the dynamic enforcement of policies based on a variety of detected conditions like service quality, subscriber usage, network performance, bandwidth and events. Now changes to service can be conducted without affecting provisioning systems, modifying configuration files or installing additional hardware in a network.

## 2023 CABLE TV PIONEERS CLASS

The **Cable TV Pioneers** will add 25 members to the class of 2023. They are **Comcast's** Amy Lynch, James Manchester, Jeff Smith and Jennifer Sardo; **Fuse Media's** Arturo Marquez; **Balan Nair** of **Liberty Latin America**; **C3 Broadband Integration's** Daniel McKay; **Diane Christman** of **The Cable Center**; **Dick Beahrs** (retired) of **Court TV**; **Eric Perbohner** (posthumous) of **Technetix**; **Broadband Success Partners' Jack Burton**; **Mega Broadband's Jack Dyste** (retired); **Cox's Kathy Payne**; **Keely Buchanan**, **Sheri Langford**, **Tom Monaghan** and **Tom Rutledge** of **Charter**; **Marc Aldrich** of **Amazon Web Services**; **NCTA's Michael Powell**; **Altice USA's Pragash Pillai**; **Randy Wells** (retired) of **RBC Daniels**, **Shannon Saviers** of **Growth-Linx Advisors**; **NCTI's Stacey Slaughter**; **Sudhir Ispahani** of **Alpha Global Partners** and **Susan Burgstiner** of **Marketing On Demand**. Also revealed was the 10 Special Designated Pioneers, which the org said represent the "numerous behind-the-scenes people whose entrepreneurialism and inventiveness have enabled new, critical services to launch at scale." Those representative honorees

are **Mike Emmendorfer** of **Calix**; **Fernando Villarruel** of **Ciena**; **Jack Moran** (retired) of Comcast and **Futurewei Technologies**; **Applied Broadband's Jason Schnitzer**; **Broadcom's Lisa Denney** and **Niki Pantelias**; **Charter's Pawel Sowinski**; **Robert Howald** of Comcast; **Steven Harris** of **SCTE** and **CableLabs' Tom Williams**. The inductees will be recognized at the 57th Annual Banquet in Denver

## FIBER FRENZY

**Sparklight** is set to begin construction on a \$12 million project to improve the reliability of its internet service in Sioux City, Iowa. The upgrade will help set the community up to receive 10G speeds in the coming years. Construction is slated to wrap up by this fall. Sparklight first launched 1 Gbps internet service to residential customers in the area in 2016.

## FRENCH OPEN READY

This year's French Open may not have Rafael Nadal competing, but it'll still serve some thrillers. **Tennis Channel**—which will become the de facto Roland-Garros Channel—will have live coverage for the 15-day event starting Sunday at 5am. Each day's coverage will begin at 5am and run until the conclusion of the final match, which will be followed by replays of that day's matches until the next morning. Tennis Channel will have the mixed-doubles final and women's semifinals on June 8. The network will air same-day encores of the men's and women's singles and doubles semifinals during the final weekend. As a whole, Tennis Channel, **Tennis Channel Plus** and **T2** will have nearly 1,750 live hours of matches. **DirectTV** customers can also enhance their French Open viewing with the "Roland-Garros Experience." Customers can tune into Channel 901 to watch simultaneous matches, with Channels 902-907 complementing standalone matches. The women's final will take place June 10 and the men's June 11—both on **NBC** and **Peacock**.

## PROGRAMMING

Season 2 of "Power Book IV: Force" will premiere Sept. 1 at 8pm on **Starz** in the U.S. and Canada. It'll be available at midnight the same day on the Starz app, its streaming and on-demand platforms and on Lionsgate+ internationally. -Xfinity is celebrating AAPI Month for this week's "Free This Week" program. Customers can watch various series, films and documentaries from **Hi-YAH**, **Kocowa** and **Xumo Play**. Among the programs included are "Hansan: Rising Dragon," "Taxi Driver 2" and martial arts films from Xumo Play's "Wu Tang Collection." Those will be available through Sunday.

## PEOPLE

**BBC Studios** tapped **Lawrence Szabo** as EVP, U.S. Content Distribution. The former **Paramount** SVP, Program Acquisitions will oversee a team of licensing specialists for scripted and factual programming, helping pursue co-production and content acquisition deals across the company's streaming and linear platforms.