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WHAT THE INDUSTRY READS FIRST

Heavy Metal: Cost of Lead-Covered Cable Presence Gets Real This Week

It's been two weeks since a *WSJ* report brought heightened attention to the lead-sheathed cables lying in some providers' networks, and the developments since have been a-plenty. We'll hear more this week during earnings calls from **AT&T** and **Verizon**, both of whom have confirmed the presence of lead-covered cables in their network.

Wall Street was quick to react to news of the contaminated copper cable threat, sending stocks topsy-turvy, and AT&T and Verizon will be hoping to calm those fears. Over at AT&T, leadership made available a [court filing](#) where it disclosed that it believes less than 10% of its two million miles of copper cable is sheathed in lead. Approximately of that cabling is buried or in conduit, a small portion is underwater and the rest is aerial.

Verizon revealed that its copper network covers less than 540,000 of its route miles, and its lead-sheathed copper makes up a small percentage of that amount. **Shentel**, also expected to report earnings soon, saved itself from scrutiny with an announcement Tuesday that it assessed its communications network and confirmed that no lead-covered cables are a part of its systems.

A question that has to be asked during the upcoming calls is whether or not the cables in question actually need to be removed or if leaving them where they are for now is actually an acceptable scenario.

"AT&T argues that the science supports leaving its buried lead-sheathed cables in place. Others in the industry have told us that they aren't sure these buried cables can even be removed, and that they've seen attempts to do so abandoned in the past," **New Street Research** said in a note to clients. In the firm's mind, the best-case scenario is that only aerial lead would need to be removed, but there's not enough out there right now to rule out a worst-case scenario where all the lead would have to go.

If that were the case, companies found guilty of having lead in their networks would be facing some major expenses ahead. NSR's estimate would have the total cost for AT&T to remove 200,000 miles of lead-sheathed copper come to \$6.5 billion.

However, in the latest thoughts from its analysts, New Street questioned whether some states or territories would be open to setting aside some BEAD funding for some of these projects. It may not be the first thing any of the states spend money on, but for those like Texas and Louisiana that will take home some of the largest funding allocations from **NTIA**, there could be room in the budget to support other efforts like lead-covered cable removals.

"While no states are likely to want to allocate money for remediation that is needed for connecting unserved or under-served locations, over a dozen states likely have more than sufficient funds to fulfill that Congressional directive," the firm said in a separate note.

Lawmakers have been relatively silent as Congress moves

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closer to its August recess, but Capitol Hill has taken some notice. **FCC** Chair *Jessica Rosenworcel* made comments last week at a press conference following the agency's open meeting that she has begun talks with the **EPA** and the White House's **Council on Environmental Quality** to discuss how the FCC can or should assist them in plans surrounding the cables.

One Congressman who has spoken up is Representative *Pat Ryan* (D-NY). He has sent letters to AT&T, Verizon and **USTelecom** with his concerns from the reports of the lead-sheathed cable in his district and his fears of how they could affect communities he represents.

"In Wappingers Falls, NY, one aerial cable runs along the perimeter of a children's playground and basketball court. While the Environmental Protection Agency generally recommends that children avoid soil containing more than 400 parts of lead per million, samples taken on the playground under the cable tested at 850 parts per million," Ryan's letters said. "As a father of two young sons, the possibility of them ingesting lead at a local playground due to Verizon's negligence over these lead-sheathed cables is appalling."

He asked all of them to respond to a number of questions by Tuesday, including the companies' plans to protect lineworkers who service or will be servicing those lines and how they all plan to address environmental and public health issues posed by both aerial and submarine cables.

TWITTER BIRDS MIGRATE ACROSS THE INTERNET, LEAVE X BEHIND

Many Twitter users were left scratching their heads Monday when the platform transitioned to a new identity: X. Confusion abounded over what to call tweets now (Elon Musk said they should be called "x's") or retweets (Musk believes the "whole concept should be rethought"), and many users were left wondering whether there was really a need to rid the platform of its trademark bird, Larry. "It's an exceptionally rare thing—in life or in business—that you get a second chance to make another big impression. Twitter made one massive impression and changed the way we communicate. Now, X will go further, transforming the global town square," Twitter CEO *Linda Yaccarino* said in a post on the platform. "X is the future of unlimited interactivity—centered in audio, video, messaging, payments/banking—creating a global marketplace for ideas, goods, services, and opportunities." Brand tweets acknowledging the shift to X weren't in abundance, but MTV did note that it had its own [idea](#) of what the platform's new logo design should have been.

DISNEY, ESPN TURN TO LEAGUES

Disney is rumored to be looking for a potential strategic partner for **ESPN** in the network's migration away from linear cable, and it could be working with the sports leagues themselves to keep the process moving. According to **CNBC**, which cites people familiar with the matter, Disney CEO *Bob Iger* and ESPN President *Jimmy Pitaro* have had [early talks](#) with leagues including the **NFL**, **NBA** and **MLB** to become minority investors in the sports network. Discussions have included a myriad of new partnership and investment structures.

WOMEN'S WORLD CUP RATINGS

The U.S. women's soccer team officially kicked off its 2023 Women's World Cup journey Friday night with a 3-0 win over Vietnam. The match had a total audience delivery of 1 million viewers across **Telemundo**, **Peacock**, **Universo** and Telemundo streaming platforms, helping it become the most-watched Women's World Cup group stage match in Spanish-language history and the third largest TAD ever regardless of stage. **Fox's** broadcast of the match averaged 5.26 million viewers (the second-most watched English-language Women's World Cup group stage match) and peaked at 6.55 million in the 10:45-11pm window. Through five matches during the opening week, Telemundo is averaging a TAD of 288,000 viewers, up 49% compared to the 2019 Women's World Cup full group stage average of 194,000.

SMART TVS GET SMARTER

Smart TVs are beginning to flex their capabilities beyond video, according to **Hub Entertainment Research's** fifth "Evolution of the TV Set" Study. While smart TV ownership is now 74% among TV homes, 77% of those users say they've used their set for more than watching TV or movies. The most popular choice is streaming music or other audio content, with casting or mirroring another device's screen being the second-most popular. Another rising feature of smart TVs is using voice commands to control devices. Over half of respondents (52%) said they use a remote with voice command capabilities most often, up from 38% in 2020. Approximately 30% of respondents have also linked their TV to a smart speaker to enable voice control.

COMCAST BUSINESS' MOBILE DEAL

Comcast Business is allowing eligible new and current Internet customers to receive one year of Comcast Business

Mobile's Unlimited Intro plan at no additional cost. It's doing so through its "Mobile Made Free" promotional event, which began today and runs through September 21. Customers must activate a new 100 Mbps or higher internet package and new Unlimited Intro line in order to qualify. Exiting customers with a 100 Mbps internet package buying a mobile line can get the second one free for a year. Normally, the Unlimited Intro plan is good for \$30 per line/per month when a customer gets two lines and allows for up to 20 GB of high-speed data per line. The promotion will be available through September 21.

NTIA OKAYS EIGHT TBCP GRANTS

NTIA awarded another eight grants last week totaling nearly \$4 million through its Tribal Broadband Connectivity Program. Tribes receiving funding this time around include the Nez Perce Tribe, the Pueblo of Jemez and the Swinomish Indian Tribal Community. Thus far, the program has awarded more than \$1.78 billion to 191 Tribal entities for broadband deployment and accessibility projects. In the coming weeks, the agency plans to release a second Notice of Funding Opportunity for an additional round of funding.

CTIA REVEALS CATALYST AWARD FINALISTS

The CTIA Wireless Foundation named the five finalists of Catalyst 2023, a grant program dedicated to helping social entrepreneurs use 5G and other wireless technologies to improve American communities. This year's finalists include **Dope Nerds**, which uses VR to deliver STEM/STEAM curriculum; **Healium**, a solution for stress management powered by biofeedback; an AI-powered mobile technology used for remote ultrasound imaging called **PONS**; **Promly**, which uses AI for age recognition, suicide and self-harm risk detection and **ReThink**, an app that uses AI and machine learning to detect online hostility. Three finalists will be selected as winners, with the winner taking home a \$100,000 grant and second and third place receiving \$50,000 and \$25,000, respectively. Other finalists will be listed as honorable mentions and get \$10,000.

WE TV, ALLBLK MAKING SPLASH AT HARLEM FILM FESTIVAL

The Harlem Festival of Culture is getting ready to take place Friday-Sunday, and **AMC Networks** and its brands will have a strong presence at the annual event. AMCN will continue to serve as a presenting sponsor through **ALLBLK** and **WE tv**, which will both sponsor the event's VIP area inspired by an iconic Harlem nightclub. Teaming up with AMCN and the Festival is Shark Beauty, which will serve as the Festival's official hair drying and styling tool.

SheaMoisture will also be on the scene as the event's haircare partner. Attendees will be able to book dry styling appointments at the Shark Beauty Hair Village, and social content featuring *Reginae Carter* will be posted across WE tv's social media platforms showing off featured looks. Live coverage will also be featured on the WE tv Instagram. Additionally, AMCN partner Boost Mobile will host events at and around their 12 retail stores in the Harlem area. That'll include giveaways, music, discounted ticket access and chances to win VIP tickets. Employees will also be educating customers on how Boost Mobile customers can add **AMC+** to their streaming lineup.

PROGRAMMING

The American Kennel Club's "AKC Fastest Dogs USA" event will be broadcast on **ESPN** on Saturday at 2pm. The event was originally held May 19 and showcased dog breeds racing within their respective breeds as well as against one another. -- Season 6 of "Ride with Norman Reedus" will premiere Sept. 10 at 10pm on **AMC** and **AMC+**, following the series debut of "The Walking Dead: Daryl Dixon." -- *Kayla Tausche* is headed to **CNN** to become a Senior White House Correspondent. She joins after being at **CNBC** for more than 12 years, where she most recently served as an anchor and Senior White House Correspondent. Tausche was a co-host for "Squawk Alley" from 2014-2017. -- We're getting closer to the return of college football, and **ESPN's** "College GameDay" is headed to Charlotte for South Carolina vs North Carolina. The show—which is entering its 37th season—will begin at 9am. Special guests for the program will be revealed in the coming weeks.

PEOPLE

Another round of changes is coming to the **Warner Bros. Discovery** family. *Robert Blair*, President, International TV Distribution, is departing after 25 years with the company. The role will not be replaced. Blair will undergo a transition period throughout the summer and work with WBD President, International *Gerhard Zeiler* to streamline the company's content licensing unit before Blair officially leaves. The move doesn't reflect Blair's performance, but rather "a shift we need to make to continue to refine our efficiency and cost structure," according to an internal memo from Zeiler. -- **Charter** is upping *Danny Bowman* from Chief Mobile Officer to EVP, Product, where he'll expand his responsibilities to include leading the video product organization after managing the company's connectivity product organizations. Bowman joined Charter in 2018 and oversaw the launch and growth of Spectrum Mobile. His role grew to include Charter's internet and WiFi organizations in 2021, which helped lead to the subsequent rollout of Spectrum One a year later. Bowman will report to President, Product and Technology *Rich DiGeronimo*.