

Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

Status Report: Delaware Celebrates BEAD Win, RDOF Remains Challenged

Louisiana is no longer the only state to have earned NTIA's approval of its Final Proposal for the BEAD program. Delaware earned the green light on Tuesday, paving the way for awards to be distributed throughout the state.

Delaware was allocated \$107 million to connect 5,721 households and businesses. Nine applicants participated in Delaware's BEAD subgrantee process, and the state has preliminarily selected **Verizon Delaware** and **Comcast Cable** to deliver broadband to homes with access to broadband.

With the BEAD program moving into its next stage, the **FCC** is being faced with a reminder that one of its most significant efforts to shrink the digital divide hasn't met initial expectations.

Providers of all sizes have begun sending notifications to the Commission letting the agency know if they have failed to meet third-year buildout expectations related to the Rural Digital Opportunity Fund. **Cox Communications** said it is committed to fulfilling its RDOF obligations, exceeding obligations across six of the nine states for which it was awarded support. The states where it has fallen short are Louisiana (71% of the milestone), Nebraska (83%) and Arizona (96%). The provider said it is working to address those shortfalls before its next milestone deadline.

Plains Internet won RDOF support to connect locations in Kansas, and thus far it has failed to deploy service to any of the three locations within the study area code for which it is responsible. **Polar Telecom**, a member-owned cooperative providing ILEC ser-

vices throughout North Dakota, also said it fell short of meeting its milestone in the state, attributing it to delays in the construction of middle-mile facilities needed for Polar to offer the gigabit-level service required in some areas receiving RDOF support.

"Specifically, Polar's RDOF development of its last-mile facilities in some of its RDOF-supported areas is integrated within a larger construction project that combines funding from **USDA ReConnect II (ReConnect)** and **ARPA Capital Projects Funds (ARPA)**," Polar Telecom EVP *Karl Blake* said in the letter. "Construction of these middle mile facilities was hindered due to delays in the environmental review process."

It expects to achieve the 40% deployment milestone mid-summer and believes it will be on track to meet all future milestones.

Providers are also continuing to default on certain census blocks with the Wireline Competition Bureau announcing Wednesday that **Commnet Wireless**, **Mercury Wireless Indiana** and **Mediapolis Telephone Company** were not going to fulfill their commitments in Idaho, Washington, Ohio and Iowa. The surrendered census blocks will now be eligible for funding from other federal and state funding programs, including the BEAD program.

O'RIELLY MAKES CFX DEBUT

Speaking of BEAD, **Cablefax's** new monthly columnist *Michael O'Rielly* has some strong opinions on what the new administration should do with the program. Check out the first installment of O'Rielly's TMT Whiteboard on p. 4.

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BOND COMPLETES FINAL COMCAST-NBCU MISSION

The tumultuous world of distribution was dealt another shake up Wednesday with longtime **Comcast NBCUniversal** exec **Matt Bond** announcing plans to retire. “In the spirit of leaving on a high note, I have decided that it is the right time professionally and personally for me to retire,” Bond wrote in a memo to staffers that highlighted the 17 deals closed in the 2023-24 deal cycle. All of those negotiations, which included a multi-year renewal with **Charter** expanding the distribution of **Peacock**, were reached without a blackout—as has been the case for the past 13 years. He will stick around in an advisory role for the next few years. His retirement comes as Comcast is in the process of spinning off its cable networks and digital assets into a new company called **SpinCo**. Bond said he and Distribution President **Matt Schnaars** are working with NBCU Media Group Chair **Matt Strauss** on how the distribution team will fit into the new Media Group structure. “I could not be more grateful and honored to have been part of the Comcast NBCUniversal family for over 20 years. Once I came to Comcast in 2002, I never once looked for another job. Comcast is a wonderful family that cares about all its people, and that attitude starts with Brian and goes through the whole organization. The company has always treated me better than I expected or deserved,” Bond wrote. Before heading up distribution for the NBCU side of the house, Bond led programming negotiations for Comcast Cable. “It was like getting a meeting with the pope back in the day,” **DirectTV** chief content officer **Robert Thun** told *B+C* in a [reflection](#) on Bond’s career for his 2023 induction into the *B+C* Hall of Fame.

ROSENWORCEL SAYS BYE TO FCC

FCC Chair **Jessica Rosenworcel**’s final open meeting heading the agency was a retrospective of its accomplishments over the last four years under the *Biden* Administration. Each bureau gave presentations on Commission efforts over that period of time, celebrating programs like the Affordable Connectivity Program and the expansion of the E-Rate program to support schools and libraries. While Rosenworcel is departing the agency upon the inauguration of *Donald Trump*, Commissioners **Geoffrey Starks** and **Anna Gomez** will be staying on to serve and the latter voiced some concerns over where the FCC may direct its attention under incoming Chair **Brendan Carr**. “Looking to the year ahead, I am concerned about the apparent campaign to bring broadcasters and content platforms to heel. We should all be concerned. First and foremost, we must respect the protections of the First Amendment and the restrictions in the Communications Act,” Gomez said. “This means the government should not bully anyone for what they say or don’t say and the Commission

is explicitly prohibited from censoring broadcasters. We must continue to uphold freedom of speech throughout the expanding media ecosystem and freedom of choice for consumers.” Her comments come after Trump ranted about *Seth Meyers* on **Truth Social**, calling **NBC** a network run by a truly bad group of people. “These are not shows or entertainment, they are simply political hits, 100% of the time, to me and the Republican Party. **Comcast** should pay a BIG price for this!”

SINCLAIR RENEWS WITH NBC

It’s been a positive couple of days for **Sinclair**. After [unveiling a debt restructuring](#) Tuesday in an effort to improve its financial outlook, the broadcast group announced a multi-year deal with **NBC** that’ll renew the station affiliate agreements for all 21 of Sinclair’s O&O NBC affiliates. That includes stations in San Antonio, Las Vegas, Providence, Toledo and Syracuse, with the total reach being nearly 7 million U.S. TV households. NBC affiliations were also renewed by Sinclair partners in five markets where Sinclair provides sales and other services: **Cunningham Broadcasting Group** (Reno, Nevada), **Deerfield Media** (Mobile-Pensacola, Florida), **Howard Stirk Holdings** (Fling-Saginaw-Bay City, Michigan), **MPS Media** (Gainesville, Florida) and **Roberts Media** (Eugene, Oregon).

DIRECTV BECOMES MAJORITY OWNER OF INVIDI

DirectTV acquired majority ownership of **INVIDI Technologies**, an addressable TV advertising solutions company that enables marketers to target specific audiences on TV without having unnecessary ad impressions. Financial terms weren’t disclosed, and INVIDI—jointly owned by **DISH** and **WPP** alongside **DirectTV**—will continue to operate as an independent company led by existing leadership. The move stems from **DirectTV**’s desire to continue investing in addressable advertising. INVIDI offers three primary solutions for advertisers: a consolidated campaign management and order distribution platform through INVIDI Conexus; INVIDI Edge, a supply-side solution for distributors and programmers to power addressable advertising on linear, broadcast, streaming and AVOD and INVIDI Pulse, which enables marketers to manage, serve and optimize ad delivery across direct and programmatic sales channels for streaming services.

HORNETS PUT GAMES OTA

The **NBA**’s Hornets are teaming up with **Cox Media Group**’s **WSOC-TV**, sister station **TV 64** and **FanDuel Sports Southeast** to simulcast five games this season. It’s the first time the team’s games



A Cablefax feature highlighting industry doings spotted in the real world.

Grand Central Meets ‘Severance’

Lumon Industries opened a remote office this week in the middle of NYC’s Grand Central Station to celebrate Friday’s debut of “Severance’s” sophomore season on Apple TV+.



Subway riders on Tuesday were treated to a pop-up glass cubicle that replicated the series’ Lumon workstations. But the real treat was that the show’s stars—Adam Scott (Mark), Britt Lower (Helly), Zach Cherry (Dylan), Tramell Tillman (Milchick) and Patricia Arquette (Mrs. Cobel) —were working inside the box, oblivious of the gawkers.

A stone-faced Scott rolled a push sweeper across Lumon’s iconic green carpet. Lower sipped coffee, while Cherry plugged away on his computer. Arquette loomed ominously. From 4:30pm to 7pm, the cast channeled their innies and got to work as rush hour commuters were headed home. What exactly the Lumon employees were doing is anyone’s guess, with the purpose of the company one of the many mysteries of the show.



Commuters were given Lumon tote bags and orientation booklets for microdata refiners as they watched the stunt. Among those in the crowd recording videos of the spectacle was Severance executive producer and director Ben Stiller, who appeared on NBC’s “Today” Wednesday. He acknowledged fans have had a long wait for the new episodes—three years! “It wasn’t intentional to have three years in between. Obviously, a lot of stuff happened—there was a strike and all this stuff, but we’ve been working on it pretty much full time since then,” he said.

will air on local, free OTA TV since the 2007-08 season, and it’ll make telecasts available to an estimated 1.3 million homes in the Charlotte region. WSOC-TV will air two games will TV 64 will carry three. The first game is set to air Jan. 27 with the Lakers facing the Hornets on WSOC-TV and FanDuel Southeast.

CFP SEMIFINALS RATINGS DIP

The College Football Playoff semifinals took place last week as Ohio State and Notre Dame punched their tickets to the National Championship. The Buckeyes’ 28-14 win Friday garnered 20.6 million viewers on ESPN, good for the most-watched Cotton Bowl on record and the best Friday telecast across all networks, genres and sports properties in over four years. Viewership peaked at 22.7 million. For the Fighting Irish’s close win over Penn State on Thursday, it recorded 17.8 million viewers with a peak of 19.9 million. That’s the second most-watched Orange Bowl since 2006. However, the two games’ combined average of 19.2 million viewers is the lowest for the CFP semifinal round since 2021.

PROGRAMMING

It’ll be **Tubi’s** time to shine at this year’s Super Bowl. **Fox Corp.** revealed plans to air Super Bowl LIX on Tubi in addition to the Fox broadcast on Feb. 9 at 6:30pm. It’ll be the first time the Big Game will be made available to stream for free. Tubi will also be used for complementary coverage in the buildup and aftermath of the game, including “Tubi Red Carpet” hosted by Olivia Culpo on the day of the game. – **Spectrum News** will air “LA Firestorm: A Spectrum News 1 Special” on Thursday at 9pm local time (8pm CT in St. Louis and Kansas City, Missouri). The one-hour program looks at the damage caused by the fires and how the community is banding together for relief efforts and aid. – **NewsNation** is tweaking its primetime lineup. “On Balance,” hosted by *Leland Vittert*, will move to the 9pm hour while “Elizabeth Vargas Reports” will shift to 7pm. Vargas was also renewed by the network on a multi-year deal.

OBITUARY

Former President and COO of **Midcontinent Media** *Joe Floyd* died at the age of 88. Floyd, a former member of **CableLabs**, **NCTA** and **C-SPAN’s** boards, oversaw the acquisition of cable systems in South Dakota, North Dakota, Nebraska and Western Minnesota. He retired from Midcontinent (now Midco) in 2001. “He was a great engineer and businessman, but what I learned most from Joe was about leadership,” said Midco Chair & CEO Pat McAdaragh. “Joe led Midco through the 1980s and 1990s and was pivotal in making Midco what it is today, a large and diverse fiber-optic company providing services to hundreds of thousands of customers. He cared deeply for people and helped many throughout his life.” Vice Chair & EVP *Steve Grosser* added that Floyd led Midco with integrity, which he believes is part of its culture today. Floyd was also a broadcasting pioneer, having started his career at KELOLAND TV, which was founded by his father. KELO, now owned by **Nexstar**, put together a nice [video remembrance](#).

Trump Should Consider Rewiring BEAD

Commentary by Michael O'Rielly

There are few times in Washington when policymakers can pursue major course corrections. Typically, once legislation is signed by the President or regulations issued by an agency, everyone shifts attention to another problem or focuses on self-congratulations. Thankfully, we are at that rarest of moments when it's entirely appropriate for President-elect Trump to demand a complete recalibration of many of the Biden Administration's decisions. In the telecom space, the most likely candidate is the Broadband Equity Access and Deployment program, or BEAD.

If ever there was a program most deserving of machete treatment, it's BEAD. After three years and not one household benefiting from the program, BEAD comes with a boatload of extracurricular mandates that exceed legality, logic or feasibility. Simply put, the Biden Administration shot for the moon believing its BEAD decisions were unchallengeable and unrepeatable. Surprisingly, there was little acknowledgement that many broadband providers could shy away from expansive participation, leaving many states with lukewarm pools of bidding partners. Turns out, providers rightly realized that government subsidies aren't free when strapped with grenades.

In fairness, the National Telecommunications and Information Administration (NTIA), which is charged with implementing BEAD, is not completely to blame for the current predicament. A small group within Congress built the broadband beauty contests and even added several mandates of their own as part of Biden's underlying infrastructure law. But not to be outdone, NTIA interpreted the law to magically create costly obligations and fulfill the Administration's telecom bucket list. Poof: long rejected concepts were relabeled as "grant conditions." In some key areas, it completely ignored the exact wording of the statute. Its leaders also filibustered Congress at oversight hearings and rejected pleas to be reasonable.

With fresh eyes and a different philosophy, the Trump Administration has the chance to ditch BEAD's harmful policy calls. To effectuate, Trump officials can issue instantaneous waivers or suspend NTIA's dreadful conditions pending reconsideration. That way, changes can be immediate, rather than contingent on completing a lengthy regulatory reversal process. If officials want to be even bolder, there is the option to suspend all pending BEAD application cycles and dismiss any state trying to include extraordinary mandatory commitments or scoring preferences.

Substantively, at least six BEAD conditions need to be tossed in the dumpster. Top of the list is NTIA's arm-twisting of states to impose and set specific rates for low-cost broadband tier offerings – despite Congress *explicitly* prohibiting rate setting. Connectedly, officials should prioritize nixing NTIA's directive that states set and obtain commitments for arbitrary and unsustainable rates in BEAD point systems. NTIA's highly objectionable venture into rates also served as a back door to push its affordability goals onto broadband providers. But it's Congress's role to enact and fund such social spending — if it decides to do so.

Next up, it's a five-way tie of "conditions" that need to go. The Trump team should erase net neutrality, open access, labor giveaways to appease unions, overrides of state government-owned provider exclusions, and inflexible Buy American equipment and network requirements. Canceling the intolerable BEAD provisions could renew broadband provider interest in state bidding processes.

The hardest nut to crack for the new Administration likely will be what to do with NTIA's fiber-first preference. Besides violating the law's technology neutrality requirement, many states are finding it expensive. This is counterproductive when cheaper technologies are comparable for pending needs. At the same time, shifting away from fiber favoritism could take considerable time — filled with litigation — delaying broadband buildouts for months or even years. Perhaps a further relaxation or clarification of the alternative technologies structure, rather than a complete rebalancing act, should be a priority.

The Biden Administration miscalculated and overdosed on liberalism with its BEAD approach. President-elect Trump and his team have a chance to fix a program that is behind schedule and chocked full of unnecessary mandates. For the sake of Americans without broadband access, let's hope for a serious redo during this very unique time in Washington.

(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.)

