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WHAT THE INDUSTRY READS FIRST

War on DEI: Carr Sets Investigation into Comcast's Inclusivity Policies

President Trump has slashed DEI initiatives across the federal government, and now it seems FCC Chairman Brendan Carr is taking a closer look at those at companies under the agency's jurisdiction.

Newsmax was the [first](#) to report Carr sent a letter to Comcast CEO Brian Roberts Tuesday notifying the executive that the FCC's Enforcement Bureau had been asked to open an investigation into both Comcast and NBCU to ensure the companies are not "promoting invidious forms of discrimination" that would violate FCC regulations and civil rights laws.

"We have received an inquiry from the Federal Communications Commission and will be cooperating with the FCC to answer their questions. For decades, our company has been built on a foundation of integrity and respect for all of our employees and customers," a Comcast spokesperson told CFX.

It's important to note this investigation isn't just centered on Comcast, and that it is part of a broader effort at the agency to ensure that every company it regulates is not violating any civil rights laws through programs promoting diversity, equity and inclusion.

Why is Comcast first to find itself in Carr's crosshairs? It's twofold. He believes there is clear evidence that Comcast and NBCU are promoting DEI, and their products stretch across a wide number of sectors the FCC regulates, including cable, broadband, broadcast TV stations and wireless.

On its corporate website, Comcast states that it believes a

diverse, equitable and inclusive company is a more innovative and successful one. It also highlights digital equity initiatives like Project UP, a \$1 billion commitment over the next 10 years to connect people to the internet, as well as supplier diversity efforts and programs to boost small and diverse-owned businesses.

In his letter, per Newsmax, Carr noted Comcast's entire "DEI infrastructure" which includes training for company leaders. He also highlighted that some executives at NBCU are seemingly dedicated to promoting diversity, equity and inclusion on the programming side of the business.

The cable industry has long been supportive of inclusion initiatives, boasting diversity organizations that have existed for more than 40 years. NCTA, which houses the NCTA Education Foundation devoted to "advancing diversity, equity and inclusion," NAMIC and The WICT Network did not offer any comment Tuesday. The Multicultural Media, Telecom and Internet Council said it had no statement.

News of the letter falls on the same day as [reports](#) that Disney has made major shifts to its DEI programs. It has rebranded its Business Employee Resource Groups (BERGs) to instead be dubbed Belonging Employee Resource Groups. It will also change certain performance factors under the Diversity and Inclusion moniker, instead adopting a Talent Strategy performance factor to determine executive compensation. While it will include aspects of the previous performance factor, the Talent Strategy piece of the pie will be evaluated by how certain values contribute to the success of the overall business.

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COMMISSIONER GOMEZ CALLS ON FCC TO CHANGE COURSE

FCC Commissioner *Anna Gomez* didn't address the **Comcast** DEI probe, but she expressed concern about the Commission's overall direction during an appearance at the State of the Net Conference in D.C. Tuesday. "During these last few weeks, the Commission has acted in ways that give me pause. This FCC has been weighing in on partisan issues that go far beyond our core responsibilities. Take, for example, the recent investigations launched against broadcast stations simply because their content or coverage is perceived to be unfavorable to those in power," she said, declaring that the Communications Act and Constitution protect journalistic decisions. "Unfortunately, I'm afraid there are other ways in which the FCC may be weaponized to threaten free expression and unleash dark forces that are against the moderation of harmful content. The administration and others have not been shy about expressing their desire to have total and complete control, to undermine, threaten and intimidate online companies that do not tow the line. Yes, I'm talking about the big elephant in the room, Section 230." Gomez argued that the government should not "intimidate" private companies who respond to consumer demands for content moderation and fact checking. "Private companies are finding it easier to retreat in the face of government threats, veiled or otherwise than to be responsive to their audiences," she said. Gomez called on the FCC to instead focus on expanding connectivity, promoting innovation, securing networks and supporting a strong independent media ecosystem. That includes ensuring affordability is part of the broadband equation and safeguarding communications networks from cyber attacks. As for media, she spoke of preserving localism, particularly in the face of mis- and dis-information, and media literacy education efforts.

HARMONIC EXPECTS SPENDING DECLINE AMID 4.0 SWITCH

While **Harmonic** anticipates a down year for broadband revenue as operators transition to unified DOCSIS 4.0, it remains assertive in its belief that it will return to market growth in 2026 as adoption of the technology accelerates. CEO *Nimrod Ben-Natan* said during the company's 4Q24 earnings call late Monday that it expects a slight dip or plateau in spending in 2025 while providers prepare for the next major technology upgrade, but it's not an unusual trend compared to similar cycles in the past that saw DOCSIS technology transitions. To help itself with the transition, Harmonic said it took a \$5 million inventory provision related to the DOCSIS 4.0 transition. "I think our focus right now is making sure that we continue to grow our market share, that we do the

right thing from a cost standpoint and that we capitalize on the opportunities that are ahead of us when that revenue comes based on the timing of our customers and their deployment plans," CFO *Walter Jankovic* said. In terms of the video market, Ben-Natan said the lines are blurring when it comes to broadcast workflows ran on dedicated services while having streaming depend on cloud technology. Harmonic is seeing rising demand for hybrid solutions that can move additional or short-term workloads to the cloud and away from core channels. That helped Harmonic improve its pipeline of larger deals in 4Q24 and into 2025, with further growth expected throughout the year. Revenue for the quarter came in at \$222.2 million, up YOY from \$167.1 million. Broadband segment revenue reached \$171 million—up from \$115.2 million in 4Q23—and the video segment revenue was \$51.1 million, slightly down YOY from \$51.9 million. The company also announced its board terminated the existing stock repurchase program and authorized a new one that lets Harmonic repurchase up to \$200 million of its outstanding shares of common stock through February 2028. The intention is to fund those repurchases from cash on hand and cash generated from operations.

NY GOVERNOR ENTERS THE MSGN-OPTIMUM BOXING RING

More New York leaders are ramping up the pressure on the ongoing carriage blackout between **MSG Networks** and **Optimum**. On Monday, Gov. *Kathy Hochul* announced that the state's Department of Public Service wrote a letter to Optimum parent **Altice USA** demanding all customers are either provided with alternative ways to watch games of affected New York sports teams or be given a pro rata refund. The [letter](#), addressed to Altice USA Senior Director, Government Affairs *Chris Bresnan*, asked that a response be submitted within five days. Among the requests is one for a detailed description of what cost-neutral options Optimum intends to offer to impacted customers, when those options will be available and how customers can enroll. It also probes if Optimum intends to provide impacted customers with a service credit for programming they haven't been receiving as well as an explanation regarding how Optimum intends to communicate cost-neutral options and/or customer credit information. "In the event that your response does not demonstrate customers are being held harmless during this dispute, you are hereby notified that the Department will conduct hearings as part of its ongoing review of this matter," the letter read. It's the second letter in a week that Altice USA received regarding the situation. [Last week](#), the AGs of New York, New Jersey and Connecticut co-signed a letter asking Optimum to provide refunds for those impacted by the dispute. "We applaud Governor Hochul's engagement and ensuring local sports fans have access to MSG Networks' program-

ming,” MSGN said in a statement. “We remain ready to negotiate with Optimum or enter binding arbitration to immediately bring our games back on the air.” Optimum said it was willing to work with Hochul “to fix the outdated programming model that does not align with how consumers watch TV today.” “We agree with Governor Hochul that local sports fans who want MSG Networks’ content should have access to it, which is why we were asking MSG to reach a deal for our customers who want it,” Optimum said in a statement. “We look forward to working with Governor Hochul to fix the outdated programming model that does not align with how consumers watch TV today. In the meantime, while we help customers with options, MSG Networks has done nothing to make their content more affordable and has made no effort to assist impacted fans.”

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SUPER RATINGS FOR SUPER BOWL

In a shock to some considering the lopsided score, Sunday’s Super Bowl LIX had a record-setting average audience of 127.7 million viewers across **Fox**, **Fox Deportes**, **Tubi**, **Telemundo** and **NFL** digital properties, according to **Nielsen**. Not only is that a new record for Super Bowl viewership, but it secured the digital all-time high with an average minute audience of 14.5 million across Tubi, Telemundo and NFL digital properties, per Tubi first-party data and **Adobe Analytics**. The peak audience came during the second quarter from 8-8:15pm when viewership reached 135.7 million viewers. That window included *AJ Brown* catching a touchdown to put the Eagles up 24-0 shortly before halftime. The average for *Kendrick Lamar’s* halftime show came in at 133.5 million viewers across TV and digital platforms, becoming the most-watched Super Bowl halftime performance in history. Spanish-language viewership on Fox Deportes and Telemundo was 1.87 million combined viewers. Prior to the game, Fox aired an interview with President *Donald Trump* during its pregame show that garnered 11.16 million viewers and 4.08 million A25-54 across the broadcast net and Tubi.

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OBERNOLTE WANTS AI COMMITTEE

Rep *Jay Obernolte* (R-CA), who chaired the **House Task Force on Artificial Intelligence**, is hoping the task force’s final report issued in December isn’t the end of the story. He’s currently pushing for formation of an AI select committee to set a federal roadmap and head off a patchwork of state regulations. “I feel like we completed the planning phase and came out with this report, so now we have concrete steps that need to be taken. I think we need a place to launch the legislation that’s going to implement that,” he said during Tuesday’s State of the Net conference in D.C. “We’re getting some pushback from the existing policy committees, feeling like we want to steal their jurisdiction away, which we’re not trying to do... I don’t care if we introduce legislation and it gets referred, dual referred or triple referred, to different policy committees.” Obernolte’s remarks came the same day the U.S. joined the U.K. in not signing an international

agreement on AI at a global summit in Paris, with VP *JD Vance* warning that heavy regulation could stifle AI. The House AI task force, composed of 12 Republicans and 12 Democrats, delivered a report last year that put forth broad principles over legislation. “AI is such a fast-moving technology that no matter what we did, there would be parts of that framework that would be obsolete the day after we did it,” Obernolte said. President *Trump* repealed *Biden’s* AI order, which Obernolte described as having good and bad components. He supports the repeal, believing that its requirement that an AI action plan be developed within 180 days will serve as a way to throw out the EO’s problematic parts while keeping the good. What does he want to keep? “There was a lot in that EO that dealt with the way that AI can be used to enhance the efficiency of government and enhance the efficacy by which we provide government services to people,” he said.

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DEBATES OVER DETERMINING SPECTRUM ALLOCATIONS CONTINUE

The debate over whether spectrum should be made available for exclusive use or via some sort of sharing mechanism continued Tuesday at a **Technology Policy Institute** event. During the roundtable discussion, Fred H. Merrill Professor of Economics at the Stanford Graduate School of Business *Michael Ostrovsky* proposed a mechanism through which shared spectrum could be incorporated into the **FCC** auction model. He proposed that the agency could run two auctions in parallel, one in which participants would bid under the assumption the spectrum is completely cleared and for exclusive use and another where the spectrum would be sold under some other model. For each of the auctions, stakeholders like the federal government could place a value on how much it would cost them to clear the spectrum. “These two would run in parallel and whichever generates the higher surplus relative to the very different clearing costs would then determine whether the spectrum is sold using the shared model or the old-style exclusive one,” he said. His proposal drew questions from FCC Office of Economics and Analytics Senior Economic Advisor *Evan Kwerel*, who argued unlicensed spectrum would not fit well into the model because it cannot be sold. Other panelists also questioned how one would manage a situation in which the **Department of Defense** is uniquely incentivized to say clearing costs would be very high to tip the scales one way or another.

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CHARTER’S KLINE TO RETIRE

David Kline, EVP of **Charter** and President of **Spectrum Reach**, will retire in May following a 46-year career. He’ll be succeeded by current Spectrum Reach SVP/CRO *Jason Brown*, whose new title will be EVP, Spectrum Reach. Kline and Brown will work together over the next few months as part of a transition process. Kline made several stops throughout his career, including stints as an executive at Charter, **Cablevision**, Ensequence and Visible World (now **FreeWheel**). During those runs, he helped launch industry firsts such as linear household addressability, interactive TV ap-

plications at scale and data-driven media campaigns that use automation and multi-screen deterministic attribution. Recently, Kline helped deploy programmatic advertising across political ads in the 2024 election cycle and re-sell local inventory from large streaming services inside the Spectrum footprint. Brown's promotion will have him oversee all ad sales, marketing, product and technology operations for Spectrum Reach, which operates in 91 markets across 36 states. Brown joined Spectrum Reach in 2023 following a stay with **DirectTV** as SVP, Ad Sales.

OPTIMUM WRAPS LA BUILD

Altice USA's Optimum has finished a more than \$30 million project to bring fiber service to more than 13,000 homes and businesses in Louisiana that were previously unserved. The project, which stretched across nine parishes, was ultimately made possible through awards from the state's Granting Unserved Municipalities Broadband Opportunities (GUMBO) grant program. This week, the company also donated nearly \$30,000 to fund 39 DonorsChoose projects across the parishes. DonorsChoose is a fundraising platform designed for teachers in need.

COMMSCOPE, NCTC SHAKE HANDS ON COLLABORATION AGREEMENT

CommScope and the **NCTC** are working together to give the cooperative's members better access to the vendor's end-to-end network solutions. The membership will have a dedicated distribution partner through which NCTC companies will have enhanced purchasing options. CommScope will also work with NCTC members seeking BEAD program funding to finance rural fiber network deployments. CommScope will also work with those service providers to ensure their fiber networks are efficient and scalable.

CARRIAGE

The new kid on the block **Chicago Sports Network** is now available on a few CTV platforms. The RSN's app can be found on **Roku, Apple TV, Amazon Fire TV** and **Android TV**. The app was already available on iOS and Android devices in addition to being accessible via a streaming subscription, which runs at \$19.99/month for one team or \$29.99/month for full network access. – **Family Entertainment Television [FETV]** has launched on **Midco's** IPTV Expanded Basic package. FETV launched in 2013 as a home to classic TV and movies. This month, it added sitcom "My Three Sons" to its lineup. FETV is available in 50 million homes, including to **DirectTV, Comcast, Fubo** and **DISH** customers.

FIBER FRENZY

Construction has begun in **GoNetspeed's** \$8.3 million expansion project in Springfield, Massachusetts. It is set to grow its footprint to 17,400 homes and businesses in the area, with the first customers to be eligible for service installation to come this spring.

WEEKLY RATINGS

Fox News carried a dominant stretch into another week after sweeping the weekly primetime and total day ratings among cable nets. The news net nearly tripled second place in prime, recording an average of 3.08 million viewers P2+ compared to **MSNBC's** 1.15 million. **ESPN** followed with 901,000 as **TNT** and **HGTV** trailed with 614,000 and 608,000, respectively. It was the same top three in total day with Fox News' 2.03 million viewers more than tripling MSNBC's 657,000. **ESPN** (504,000), **CNN** (417,000) and **HGTV** (332,000) filled the rest of the top five.

A YEAR OF DIRECTV PERKS

DirectTV is celebrating the one-year anniversary since launching its loyalty program DirectTV Perks. The MVPD is offering a series of giveaways for Perks members, including the chance for 500 participants to get \$50 **Amazon** eGift cards through Feb. 28. Starting Friday and running through Feb. 21, discounts will hit TVOD rentals as a \$5.99 rental will need 30 rewards tokens (down from 250) and a \$19.99 rental will require 150 tokens instead of the usual 850. Additionally, members can enter to win one of 10 \$25 Fanatics gift cards from Friday until Feb. 28, and two full-team signed San Diego FC jerseys will be up for grabs from Feb. 24 to March 31.

PROGRAMMING

Reelz is giving "On Patrol: Live" a week-long spotlight. The network announced plans for the first-ever "On Patrol: Live Week," an event that'll start with new live episodes Feb. 21 and 22 at 9pm before two fan-chosen episodes air back-to-back starting Feb. 23 through Feb. 27. The fan-selected eps will air at 9pm and midnight, respectively. Closing out the week will be new episodes debuting Feb. 28 and March 1. – **Major League Rugby** franchise Old Glory D.C. scored a distribution win with **Monumental Sports Network** unveiling plans to air the team's full 2025 season. The season will run from February through the first week of June, starting with Old Glory's season opener against the Miami Sharks this Saturday at 6pm. Monumental aired 13 Old Glory games live in 2024.

PEOPLE

Jared Boshnack was upped to Executive Producer/VP, Production at **YES Network**, with Executive Producer **John "Flip" Filippelli** transitioning to a new role as Senior Advisor. Boshnack will now oversee all aspects of production at YES while Filippelli will counsel YES President/CEO **Jon Litner** as well as Yes Chair and New York Yankees President **Randy Levine** on programming and other initiatives. Filippelli was the first YES employee, hired on Sept. 10, 2001, after holding production roles at **ABC Sports, NBC Sports, Fox Sports** and more. Boshnack first came to YES as its Graphics Coordinator on the network's launch date, March 19, 2002.