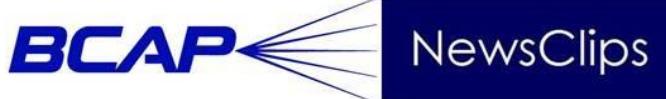




Cloud Communications for Service Providers



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December 9, 2020

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New York Times
[Who's Behind the Fight Between Warner Bros. and Hollywood? It's AT&T](#)

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[Fox CFO Hints Company Could Drop 'Thursday Night Football'](#)

Pittsburgh Tribune-Review
[U.S. Supreme Court denies Republican injunction request in](#)

Nearly \$370 million of the \$9.2 billion the Federal Communications Commission awarded Monday through an auction will go to broadband service expansion for rural Pennsylvanians. The FCC said the funding, over the next 10 years, will provide high-speed broadband internet service to 5.22 million unserved homes and businesses, boosting access in rural U.S. areas. The Rural Digital Opportunity Fund Phase I auction will bring access to an estimated 327,000 people living and working in Pennsylvania.

Erie-based organizations received an allocation of more than \$2.5 million, which will expand services to an additional 3,009 customers. CCO Holdings LLC (Charter Communications) received a \$2.15 million investment. Erie Space Exploration Technologies Corp. received \$172,222 and Erie Windstream Services LLC received \$258,098.

"Improved access to broadband puts Erie in a better position to welcome bigger employers to the region and offer better educational opportunities," said State Rep. Ryan Bizzarro, of Millcreek Township, D-3rd Dist. "Seamless access to broadband is no longer a luxury, it's a necessity, especially as we rely on connecting virtually for productivity and public safety efforts." — **Erie Times-News**

Charter Communications was the big cable market winner in Phase I of the US Rural Digital Opportunity Fund (RDOF)... and it wasn't even close.

According to [FCC results issued today](#), Charter qualified to receive \$1.2 billion in federal government support for deployment plans spanning some 1.1 million locations. Several other US cable operators also participated in the bidding and came away with a few spoils. Here's a representative list of the winning bidders in the Phase I RDOF auction that are obviously cable operators or are known to have cable network operations.

Charter's RDOF take was big, but it could have been even bigger. "Charter was the biggest winner, but won fewer markets than we expected," the analysts at New Street Research explained in a note following today's results.

Pa. mail-in ballot challenge

"We have looked at the auction as a compelling way for Cable companies, specifically Charter, to expand their footprint with compelling returns."

Spotlight PA Firm ran Pa. senator's campaign and worked with super PAC to attack opponent, but denies coordination

US cable operators, they pointed out, have already benefitted from robust broadband subscriber growth so far in 2021. "[T]he RDOF Auction is an opportunity for Cable to further accelerate subscriber growth." Charter signaled its intention to join the bidding for the RDOF back in July. According to Charter's original RDOF plan, the operator has proposed to use a blend of hybrid fiber/coax (HFC) and fiber-to-the-premises network deployments, depending on the location.

Philadelphia Inquirer Republican Sen. Pat Toomey calls Trump's campaign to overturn Pennsylvania election 'completely unacceptable'

Citing a quiet period that still stands following today's results, Charter Chairman and CEO Tom Rutledge was tightlipped about the RDOF auction in a talk at a UBS Global TMT Virtual Conference. However, he did address the general opportunity Charter sees in broadening its reach in rural areas. "We think it's good for us financially to extend our broadband network ... to as many people as possible," Rutledge said. "We think working with the federal, local and state authorities to improve access to poles and rights-of-way [and] proper subsidies can get it done ... We think it can be done in an economically efficient way."

The Phase I RDOF auction covered about 5.2 million locations and \$9.2 billion in subsidies, well below the \$16 billion that had been set aside. The remaining \$6.8 billion not allocated this round will be rolled into the future Phase II RDOF auction. Winners receive 10 years of subsidy payments, dispersed in equal monthly installments, and six years to deploy to the winning locations.

The FCC said 99.7% of the locations in Phase I will receive broadband speeds of at least 100 Mbit/s down and 20 Mbit/s up, with 85% poised to get 1-Gig speeds. New Street Research said payments will start when bidders become authorized to receive support, possibly by Q2 2021. – ***LightReading***

NBCUniversal streaming service Peacock has reached more than 26 million signups, NBCUniversal CEO Jeff Shell told an investors conference Tuesday. "As of yesterday, we're just up over 26 million signups, so the momentum just continues in a very strong linear way," Shell told the UBS Global TMT Virtual Investors Conference during a session that was webcast. Parent Comcast in October reported the Peacock streamer had reached nearly 22 million signups as it released its latest financial results.

Shell added that Peacock's business plan is to offer either a free or cheaper alternative to pricey rival streaming platforms in a digital era where cable bundle cord-cutting isn't going away. "In a world where people are spending a lot of money on Netflix, Disney+ and HBO Max, there will be room for a more affordable, ad-supportive service," Shell argued. Peacock has also launched without the Olympics, which were delayed one year, and strong programming like *The Office*, which lands on the advertising video on demand service in January after play on Netflix.

To continue growth at Peacock, NBCUniversal is focused on originals TV production to drive signups and usage of the AVOD service. At the same time, the studio is reserving some premium content to encourage consumers to subscribe. "I think we'll continue to do that, especially since that's been stronger than we've actually expected," Shell said of Peacock's subscriber base. He added popular TV sports properties like the National Football League and the Olympics, which depend on audience reach for advertising revenues, will continue to underpin the main broadcast network.

Niche TV sports, on the other hand, and news content, will be used where possible to drive audience engagement to Peacock. Shell added the international rollout for Peacock will avoid major markets like the U.K., Germany and Italy where Comcast parent NBCUniversal has a major presence with Sky. "Peacock is a product we will use selectively in markets," he told investors, as the AVOD's programming will still land on Sky in the U.K. market.

Shell, who took over as CEO of NBCUniversal from Steve Burke at the beginning of 2020, also discussed a recent shift in his executive ranks from a network-by-network leadership into a consolidated group with Frances Berwick overseeing business operations and Susan Rovner, chairman of entertainment content at NBCUniversal TV and streaming, overseeing entertainment content across the company's portfolio.

He argued NBCUniversal had moved away from a vertical reporting structure to allow executives at each of the studio's networks to work on content from other divisions, and that mirrored how consumers increasingly view TV content across multiplex platforms. And Netflix, evidently, as a horizontal management structure at the studio allows Rovner and her team to program across all platforms, including Peacock. "It's similar to when somebody walks into Ted Sarandos at Netflix and he can say yes to something, Susan Rovner can say yes to something," Shell explained. "So it was really about realigning the massive TV operation to be more aligned with the way consumers are watching TV now and into the future," he added.

The NBCUniversal boss also addressed the current film industry debate about collapsing the theatrical window and charging a premium price for early home viewing, a pandemic-era trend started in part by Universal Pictures' decision to break the theatrical window for "Trolls World Tour." "Theatrical is a critical part of the movie business. What makes movies movies is their event and what makes an event is you can actually get in your car and drive somewhere and watch something on a big screen with great sound, the way that directors and filmmakers had meant for us to see the property," Shell explained.

At the same time, many movie lovers will continue to want to view product at home, and they shouldn't have to wait many months to do so, he said. "I think that theatrical will continue to thrive and the more windows can collapse so there's other ways to see things at home and in a less premium fashion, the more money is going to be made by everybody involved in the movie business and it's better for consumers," he added. — **Hollywood Reporter**

