

From the Magazine: Time for Carriers to Swing for the Fences

Andrew Berg

It's baseball season, and Charlie Ergen has just proven he can throw a knuckleball as well as R.A. Dickey. Where's the cold beer and peanuts? It's looking like this battle for Sprint is headed into extra innings.

The industry has talked a lot about the need for a third mobile platform, but in 2013 we're also going to be talking about some high-profile mergers and acquisitions that aim to create a third carrier who can finally match batting averages with Verizon and AT&T. Sprint and T-Mobile are both to be commended for the rehab work they've done over the past few years, but both carriers realize they can't play triple-A ball forever.

You have to like the kind of game Ergen plays. He's a scrappy ballplayer. However, after stealing that huge chunk of AWS spectrum, you kind of hope he doesn't leave it stranded. That's what makes this play for Sprint a suicide squeeze. It's all or nothing for Dish's wireless hopes. Ergen needs a wireless veteran to help him get that spectrum in play.

In the end, however, the tie-up between Clearwire, Dish, Sprint, and Softbank is playing out like a high-profile trade for the ages, and we're going to need more than Jay-Z to resolve this thing or it's in danger of turning into that famous Abbott and Costello skit, "Who's on First?" As it stands, both Dish Network and Softbank have made offers for Sprint. Meanwhile, Clearwire continues to take monthly funding to the tune of \$80 million from Sprint. I'm guessing after taking a look at this thing, the Commissioner he'll be passing this one to someone else.

And then there's T-Mobile. If Charlie Ergen is a finesse pitcher, then John Legere is bringing the high heat. Legere has already thrown at AT&T for crowding the GSM market, and that recent cowboy TV spot is an inside brush off of Verizon Wireless and Sprint as well.

Remember Ricky Vaughn, played by Charlie Sheen, from the movie Major League? Ricky's nickname in that film was "Wild Thing". He was the kind of pitcher that batters hate to face because of his velocity and his control problems. LeGere's a little like that. He's unpredictable, but it looks like he has the potential to stare down the heavy hitters. We'll see.

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As for AT&T and Verizon, they're a little like the Yankees and the Red Sox 10 years ago. They're able to pick up the big arms (Samsung, iPhone), and they're always contenders. And yet they sometimes incite in the fans a need to root for the underdog.

Speaking of big arms, it should be interesting to see what kind of control Samsung and Apple can muster. While Samsung's Galaxy line has proved a crowd pleaser, it'll be matching up against Apple. Still, Apple appears to be struggling with the curve lately, which has sent the company's market value sinking like rock. Is it possible that veteran relievers Nokia and BlackBerry might get the nod from consumers?

In the end, the wireless industry has all the makings of an entertaining season. Legere and Ergen, as well as Hesse, would like to shutout the big two, and they've proved they're willing to trade up to do it. Legere's lineup is pretty much set, but Ergen and Hesse are going to have to untangle the previously mentioned negotiations with the Japanese Baseball League if they're going produce at all.

One thing's for sure, everyone on the field this year is going to be looking for more ways to get on base, which if we continue with this metaphor, can mean more growth opportunities. Whether that means selling virtual peanuts and popcorn, or dialing up HD Voice from the bullpen, everybody wearing the skipper's jacket will be angling to boost revenue at the ballpark this year.

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