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What the Industry Reads First

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Going Public: AT&T's Stine Talks Shifting Cloud Transformation Strategy

AT&T has made headlines recently for striking up a \$2bln cloud deal with **Microsoft**, but the decision to revamp how it looked at the public cloud came years before those stories came to light. According to svp, business transformation *Steve Stine*, conversation around switching its cloud strategy began in 2016 when *John Donovan*, then leading AT&T's technology and operations, began talk of being a public cloud first company. "It takes a while for you to really understand what's going to be the best approach, what should go there versus what shouldn't go there, how you would start to make that pivot to get the most out of it," Stine told **CFX**, explaining that a team dedicated to investigating the public cloud, and Microsoft Azure, has been around for some time. Rather than dedicating resources to maintaining its own cloud solution, AT&T will focus on its core network capabilities and optimizing costs. Microsoft, meanwhile, gets access to a larger, faster sandbox. "Having that new environment where you can innovate and get the speed out of it and then bring in the capabilities that come inherently that will start to look more cloud native like AI and other tools, you can see why it gets pretty darn exciting for us to look at what the potential is here," Stine said. Other areas of collaboration include cybersecurity, IOT and upgrades to AT&T's FirstNet infrastructure. AT&T has set 2024 as its deadline to migrate most of its non-network workloads to the public cloud. "A lot of that timeframe is driven not by any questions of what the business is doing, it's just that this is an immense amount of work. There are thousands of applications that support mission-critical stuff, even if it's non-network," Stine explained. Partners will also investigate how to improve other segments of AT&T's business, including its entertainment group. "If you think of a world where you've got a modern media company with these great innovation capabilities, connectivity throughout, you can kind of let your mind go to where the potential is for areas to expand: high-speed networks, optimizing your video, advertising, the various things that we would both potentially benefit from," Stine said.

CommScope Shakes Up Management: *Bruce McClelland*, former **Arris** CEO, is out at **CommScope** after the company eliminated the COO position. McClelland spent less than six months in the role after starting in February following CommScope's \$7.4bln acquisition of Arris. CommScope CEO *Eddie Edwards* and other senior members of the management team will take over McClelland's responsibilities. "This decision to flatten our leadership structure expands

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accountability, which we've been striving to do in virtually every part of our company as part of our transformation," Edwards told investment analysts during CommScope's 2Q earnings Thursday evening. "I am deeply committed to CommScope's continued growth and success, and with the board's full support I'm taking a more active day-to-day operational role in leading our company through these challenging times." CommScope reported net sales of \$2.57bln, an increase of 107% YOY. The second quarter of 2019 included Arris sales of \$1.37bln from the date of acquisition. Its quarterly earnings of \$0.66 a share beat analyst expectations of \$0.58 a share. Sales were down 10% for *Ruckus Networks*, generating \$151mln in 2Q19. "Despite the challenging year, we remain very excited about the combined CommScope and Arris portfolio. We are now just four months into the ownership of the Arris business," Edwards said. "As we continue to integrate our teams and processes, our enthusiasm for what we can achieve together grows stronger. Together we have a more compelling and diversified global platform to promote service providers and enterprises."

CBS/Viacom Deal Could Come Monday, Report: Rumors have swirled around a **CBS/Viacom** merger for months, and **Fox Business'** *Charlie Gasparino* predicting news as soon as Monday. The two companies' boards are working on the timeline with the hope of then going on vacation, he reported, but "timing could slip as it often does." The boards should know by Sunday evening. Viacom and CBS stocks closed \$30.01 and \$48.91, down 2.5% and 3.85%, respectively. -- In related news, **CBS** said it intends to accelerate the roll out of local versions of its CBSN streaming-video news service in all 13 markets where it operates. It first launched a NY free AVOD service in Dec 2018, and another one in LA in June. The company plans to launch Boston and San Fran by the fourth quarter, with nine other local versions out by 2020, in time for the election. The CBS Local services ultimately will be included as live channels on **CBS All Access** in their respective markets as well. "The early success of CBSN New York and CBSN Los Angeles has exceeded our expectations," said *Peter Dunn*, pres of CBS Television Stations. "It is clear there is significant demand for high-quality local news coverage on streaming services, and we are moving forward with excitement as we prepare to launch CBSN Local services in all 13 of our local news markets."

Reports Suggest White House Considering FCC Role in Social Media: The White House reportedly has drafted an executive order called "Protecting Americans from Online Censorship" to give the **FCC** at least some authority over **Facebook**, **Twitter** and other tech companies, according to a **CNN** report. The order would let the FCC develop new regulations that determine how the companies filter content on their platforms. **Public Knowledge** strongly condemned the rumored EO. "These leaks about a potential Executive Order from the White House are troubling on many levels, from the order's potential to violate the First Amendment, to its apparent disregard

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for the independence of agencies like the FCC and the **FTC**, to its intent to unilaterally limit Section 230, which promotes moderated online communities free of hate speech and misinformation. If these reports are a trial balloon from the White House, then it's time to pop it," said pres/CEO *Chris Lewis*.

Bravolebrities Heading to NYC:

Bravo announced tickets and the lineup for its first BravoCon, taking place Nov 15-17 in NYC. More than 70 Bravo stars will be attendance with more than 30 live events taking place, including those from shows like "Vanderpump Rules," "Southern Charm," "Top Chef," "Shahs of Sunset," "Million Dollar Listing," "Married to Medicine," "Summer House," "Below Deck" and "The Real Housewives." "Watch What Happens Live with Andy Cohen" will film in front of the show's largest audience in history on Nov 15 at the Hammerstein Ballroom. Tickets start at \$299 and go on sale Aug 13.

Cable Center Establishes Cindy Bennett Memorial Fund: Friends and colleagues of *Cindy Bennett* established a memorial fund in her honor that will create scholarships for the **Cable Center's** Intrapreneurship Academy. Industry vet Bennett passed away at 48 after a battle with colon cancer. A memorial service will take place on Aug 16 at 2pm in the Saint Thomas Episcopal Church in Denver, CO. Donations to the fund can be made [here](#).

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Up Ahead

- Sept 13-17:** [The IBC Show](#); Amsterdam
- Sept 16:** [WICT Touchstones Luncheon](#); NYC
- Sept 16-18:** [CCA Annual Convention](#); Providence, Rhode Island
- Sept 17-18:** [33rd Annual NAMIC Conference](#); NYC
- Sept 30 - Oct 3:** [Cable-Tec Expo](#); New Orleans, LA
- Oct 14-17:** [MIPCOM](#); Cannes, France

Research

- > Swing state voters were 1.24x more likely to only watch *The Bachelorette* (which ran simultaneously on debate night 1)—opting out of the debates entirely—and 1.36x more likely to watch a combination of the two programs.
- > Advertisers during the third commercial break – including Lexus and Verizon – enjoyed the highest reach during ad breaks, while on night two, advertisers during the second break – including the Alzheimer's Association, Liberty Mutual and Stamps.com – saw the highest audience reach and retention

(Source: Business Wire, 605 Data)

Quotable

"The internet also can't help to promote diverse voices if those voices can't get online. Or if the audiences they hope to serve aren't online. Diversity is directly linked to broadband access and affordability. Internet inequality is persistent, and it disproportionately affects low-income Americans and communities of color. We need to continue to work towards broadband for all, not just so that diverse communities have access to diverse voices, but so that they might become those voices."
– FCC commish Geoffrey Starks at the Williams & Connolly Celebration of Diversity

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