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WHAT THE INDUSTRY READS FIRST

Future Fiber: FBA Urges Need for Better Infrastructure in AI Race

In July, the *Trump* administration released its AI action plan, a policy roadmap aiming to accelerate tech innovation through investment and deregulation while enabling the buildout of the infrastructure the country will need to power the AI models of the future. Key to winning the AI race, according to the White House, is expediting and modernizing permitting for the construction of many, many more data centers around the country. In a webinar, the **Fiber Broadband Association** highlighted how vital expanding and upgrading current fiber infrastructure will be to these AI ambitions.

“While we saw the action plan largely focus on energy and semiconductors as well as the construction of data centers themselves, there was acknowledgement that telecommunications is a crucial AI development supporting infrastructure,” said *Jordan Gross*, Director, State Government Affairs, **Lumen Technologies**, during the session. “We’re looking to continue to make sure that this is front and center and that there’s recognition that fiber is AI infrastructure.”

A new FBA research [paper](#), released in partnership with **RVA** last week, offered plenty of stats to underscore an “unrecognized need” for more and better fiber infrastructure to meet the “exploding capacity demands from artificial intelligence applications on hyperscale data centers.” Citing forecasts by AI experts, the paper estimated that there will be an at least 3X increase in hyperscale data center capacity by 2029, requiring an almost

2X increase in fiber route miles (from 95,000 to 187,000) and 2.3X increase in fiber miles (from 159 million to 373 million). The additional fiber miles required include 109 million miles for upgrades on existing routes, 66 million miles for connections to new data centers and 38 million miles for new long-haul routes.

“From every new data center, which many of these are going to be in the middle of nowhere, we’ve got to get to the internet. We’ve got to create new laterals from that point to the nearest internet connection point. Each one of those, we’re looking at 35 to 50 miles on average to get to those points,” said *RVA CEO Michael Render* in his remarks during the webinar.

Render added that “for a new data center, you’re going to want to go different directions to different interconnection points, preferably sometimes from different providers...And then once you get to the long haul, you’ve got at least two conduits, many times more, hundreds of thousands of fibers per conduit, many light bands for fiber. All that is what is creating this infrastructure that we need.”

The paper identified three types of interconnects needed to meet the future data center demand: new short interconnections for every new hyperscale data center, averaging 135 route miles of connectivity per site; upgrades to existing long-haul fiber interconnections to increase capacity; and entirely new long-haul interconnection routes to meet latency and bandwidth requirements.

“As time goes on, we’re going to need to replace cable,” Render said of necessary long-haul upgrades. “People are using methods

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to pull new fiber cables over the old. Sometimes there's an empty conduit, which is great. Sometimes you're going to have to pull out existing cables and put in new and, of course, sometimes even put in a new conduit."

The FBA paper stressed the need for enough "highway width" for the huge amount of data that will be transferred across a growing number of data centers. Progress on this front includes new routes deploying cables with fiber counts of up to 1,728 strands per cable, with cables containing up to 16,000 strands already announced for the future. Also mentioned were new multi-core fiber cables that increase fiber pathway capacity within the same strand of fiber and a method called dense wave division multiplexing, which is used to increase the amount of data passing over each individual fiber.

On the challenge of getting as close to zero latency as possible, the FBA said finding the most direct routes possible between data centers to reduce latency is pivotal for long-haul fiber providers. There are also new advancements such as hollow core fiber, where light travels via a hollow, gas-filled core vs glass, which has the potential to improve latency by 20-30%. John George, Sr. Director, Solutions Engineering & Fusion Splicers at **Lightera**, was quick to note during the webinar that hollow core fiber is very expensive to make and that it's very early days for this new solution.

Both the webinar and paper concluded with the FBA highlighting the need for policy action to help support this fiber buildout, including through permitting relief and access to public lands. Gross said that "as the administration and Congress are looking to make improvements to permitting as relates to energy, we've got work to do as an association, as an industry, to ensure that there's reform for our industry as well."

David Eckard, **Nokia** VP, Broadband Partners, touched on the cooperation needed between the FBA and other organizations, whether they're dedicated to data centers or rural connectivity, to accomplish policy reform. "The policies that have to be created, we have to coordinate as best we can to help move this thing forward. Otherwise, what happens is one accelerates, one is lagging."

'NEW PARAMOUNT' ASSEMBLES LEADERSHIP TEAM

Thursday is the long-awaited day for **Skydance** and **Paramount Global**'s merger, and the soon-to-be combined companies made their initial leadership unit official Monday. The company, which has been referred to as "New Paramount" throughout the year-long approval process, will be divided into three main branches: studios, direct-to-consumer and TV media. Helming the ship will be *David Ellison* as CEO, while former **NBCUni-**

versal CEO *Jeff Shell* will step into the role of President and manage the day-to-day operations of Paramount's media businesses. *Andy Gordon*, a former Partner at **RedBird Capital**, will take on Chief Strategy Officer and COO and *Stephanie Kyoko McKinnon* will serve as General Counsel and Acting CLO. While it was already known that Paramount co-CEO *Chris McCarthy* was [departing upon the merger's closing](#), Monday's announcement confirmed the simultaneous exit of another piece of the CEO trio, *Brian Robbins*. *George Cheeks*, however, will stay as Chair of the TV Media segment after having been President/CEO of **CBS**. He'll oversee Paramount's broadcast and cable businesses. Skydance's previous Chief Creative Officer *Dana Goldberg* will guide Paramount Television, also being co-Chair of Paramount Pictures alongside *Josh Greenstein*, the former President of **Sony Pictures'** Motion Picture Group. *Cindy Holland*, once an 18-year veteran at **Netflix**, will be Chair of the DTC unit, which includes **Paramount+** and **Pluto TV**. Paramount's previous President/CEO of Streaming and co-founder of Pluto TV *Tom Ryan* is leaving Paramount as well, but will stick around through a transition period. The Skydance deal won't only be a pivotal moment in Paramount's history, but it also marks the end of a chapter for controlling shareholder (for now) *Shari Redstone* and her late father, *Sumner*. Redstone delivered a farewell during Paramount's 2Q25 earnings call last week, noting her confidence in Skydance's vision for New Paramount and "the enormous importance of this business to my family and to me." "I am proud that when the transaction closes, we will be turning over a healthy business with a strong foundation for success. One year ago, that was not a foregone conclusion against the backdrop of tough industry conditions in the linear business in a pending transaction," she said. "We will always be cheering on Paramount and the talented people who have made it what it is today."

ECHOSTAR TALKS FCC, TAPS MDA SPACE FOR LEO

Amid conversations with the **FCC** about its 5G network buildout and AWS-4 spectrum licenses, **EchoStar** is moving forward in efforts to stabilize the company. But there's still a sense of frustration and uncertainty given that the Commission is looming large over EchoStar. During its 2Q25 earnings call Friday, CEO/President *Hamid Akhavan-Malayeri* reiterated that the FCC hasn't necessarily given them a detailed mandate or list of needs, but they remain in talks about what would be a viable solution that benefits all parties. "In terms of what [the] FCC wants, I think that's a good question for [the] FCC," he said. He mostly declined to comment on the recent *Bloomberg*

article that claimed FCC Chairman *Brendan Carr* [delivered an ultimatum](#) to EchoStar Chairman *Charlie Ergen*, however, Akhavan-Malayeri said, “All I can say is that it did not come from us. Therefore, I have no way of knowing what the source of that comment is,” later adding that the FCC “would like to see more spectrum in use. They’d like to see the market become more efficient in a number of ways, and I think we understand that. And there’s a million ways that can happen. Those million ways have not yet landed in a way that I can give you a full picture. We have not eliminated any options from the table.” Before the earnings call, EchoStar announced it picked **MDA Space** as the primary contractor for its new non-terrestrial network LEO direct-to-device satellite constellation. It’ll enable global talk, text and broadband services directly to 5G NTN handheld devices. The full group will contain 200 satellites with future growth to thousands, depending on demand, but the first batch of more than 100 satellites is valued at approximately \$1.3 billion (total cost of the LEO project is anticipated to be \$5 billion). The constellation will utilize up to 25x20 MHz of AWS-4/S-band 2GHz frequencies. Delivery of satellites is planned for 2028, while commercial service is slated to begin in 2029.

CPB CLOSING UP SHOP

The **Corporation for Public Broadcasting**, a federal funding arm for **PBS** and **NPR**, announced Friday it was starting a wind-down of operations following the passing of the [rescissions package](#) and the Senate Appropriations Committee [leaving CPB out](#) of a fiscal 2026 spending bill. “Despite the extraordinary efforts of millions of Americans who called, wrote and petitioned Congress to preserve federal funding for CPB, we now face the difficult reality of closing our operations,” said CPB President/CEO *Patricia Harrison*. CPB notified employees that a majority of staff positions will cease upon the close of the fiscal year (Sept. 30). A small transition team will stay through January “to ensure a responsible and orderly closeout of operations,” focusing on compliance, final distributions and the resolution of long-term financial obligations. CPB’s Board of Directors, along with management, are working to address any legal, financial and operational requirements of the closure. No word on specific NPR/PBS stations that’ll shut down due to the lack of CPB funds.

T-MOBILE-USCELLULAR CLOSES

T-Mobile put a bow on its \$4.3 billion acquisition of **UScellular**. Over 4 million UScellular customers will transition to T-Mobile’s network and get access to its various offerings. T-Mobile and UScellular customers will have reciprocal roaming until their networks are fully integrated in the coming months. UScellular customers will have no changes made to their active plans, but folks can choose to shift to one of T-Mobile’s unlimited plans or upgrade to Experience plans that contain benefits

such as T-Satellite.

GRAY GRABS BLOCK’S STATIONS

Gray Media is buying **Block Communications’** portfolio of TV stations for \$80 million. The deal includes WDRB (**Fox**) and WBKI (**CW**) in the Louisville, Kentucky, market, where Gray already owns and operates the **NBC** affiliate WAVE3. Others that are part of the deal are WAND—the NBC affiliate in the Springfield-Champaign-Decatur, Illinois, market—as well as fellow NBC station WLIO in Lima, Ohio, and its associated low-power stations. Gray expects the agreement to close in 4Q25 once it receives regulatory approval, but noted that it’ll need certain waivers of the **FCC’s** current ownership rules.

COMMSCOPE TO SELL CSS UNIT TO AMPHENOL FOR \$10.5 BILLION

Amphenol is set to snatch up **CommScope’s** connectivity and cable solutions business for \$10.5 billion in cash. The deal is expected to close in 1H26. Amphenol said the agreement expands its interconnect product capabilities within the IT datacom market, specifically by adding fiber optic interconnect products for AI and other data center applications. CommScope will use the money to repay all debt and add modest leverage on its remaining businesses, which will lead to excess cash that the company will distribute to shareholders as a dividend within 60-90 days after closing.

SPECTRUM INKS SPONSORSHIP WITH MLB’S CARDINALS

Charter is looking to play ball with the St. Louis Cardinals. The company revealed a multi-year marketing agreement with the **MLB** franchise to make Spectrum its official telecommunications partner. The partnership entails advertising rights on the Cardinals’ English- and Spanish-language radio broadcasts, Cardinals.com and social media channels, in addition to sponsorship of the team’s pitching changes at Busch Stadium. Spectrum signage will be present throughout the stadium, as well as on displays behind home plate and on the left-field wall during home TV broadcasts. Charter is a native St. Louisan, having originated from the city in 1993.

PEOPLE

Shentel is getting a change at the top. *Chris French* will transition from President/CEO to Executive Chairman of the Board. He’ll continue to help direct the company’s strategy and work with the company’s senior leadership and Board of Directors. Succeeding French will be current EVP/COO *Ed McKay*, who’s held that title since July 2021 and has 29 years of telecommunications experience under his belt. The expected transition date for both French and McKay is slated for Sept. 1.