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May 6, 2019

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TiVo announced Monday that Armstrong is the latest service provider that will use TiVo' Next-Gen Platform in its transition to IPTV. Armstrong will be deploying TiVo's cloud-based IPTV offerings including IPVOD, IP linear, restart, catch-up and network DVR across a variety of clients, within in the operator's service footprint. Armstrong operates in areas across Ohio, Pennsylvania, West Virginia, and Maryland.

The TiVo platform enables content delivery to customers via Android TV or Linux-powered managed set-top boxes, as well as consumer-owned devices like Apple TV, Amazon Fire TV, Roku or mobile

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devices. “We are thrilled to be working with TiVo on our next generation video platform,” said Jeff Ross, president at Armstrong, in a statement. “Our business is built on continued innovation, and TiVo’s industry-leading solutions enable us to deliver superior entertainment experiences that our customers deserve.”

Last week, TiVo announced that cable operator RCN will be the first to deploy the new TiVo platform, powering RCN’s latest video solution across Android TV set-top boxes, streaming devices, and mobile. Grande Communications and Wave Broadband also plan to use the TiVo offerings. RCN and Grande were both acquired by investment firm TPG Capital through separate transactions in 2016. In 2017 the firm announced backing to combine RCN/Grande with Wave Broadband for \$2.36 billion.

Together the companies serve about 950,000 customers. RCN’s primary service areas include Washington DC, Philadelphia, Lehigh Valley PA, New York City, Boston, and Chicago. “After reviewing a number of solutions on the market, we were impressed with TiVo’s Next-Gen Platform and their commitment to helping us bring forth a compelling user experience, personalized recommendations, advanced voice functionality and multi-platform support to our customers,” said Patrick Murphy, CTO of RCN, Grande and Wave. “Additionally, TiVo’s IPTV products provide advanced video solutions for our broadband-only subscribers and enhance the RCN viewing experience across mobile platforms.” – **CED**

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Apple Inc., meanwhile, said last week its sales-and-profit slump extended into a second straight quarter—[the first time that has happened in more than two years](#)—thanks to falling sales of the iPhone, the product that turned it into a colossus. Its response has been to try to morph itself into a services company fueled by app and entertainment sales as much as hardware.

Google parent Alphabet Inc. has been Big Tech’s most eclectic big-idea factory. It has worked on self-driving cars for a decade and has arms devoted to everything from balloon-tethered internet access to extending human life. But it has had little success turning those efforts into moneymaking businesses. Advertising is still 85% of its revenue, and operating losses at its “other bets” segment ballooned by 52% in the last quarter to \$868 million, Alphabet said last week. The perils of its ad dependence were laid bare when [an unexpected drop in quarterly sales](#) sent Alphabet shares down 7.5% on Tuesday, [their biggest one-day drop since 2012](#).

A confluence of forces is behind Big Tech’s business-model ferment. Blowback over privacy abuses and misinformation threatens ad-driven strategies at Facebook and Google built on harvesting people’s information and maximizing the time they spend glued to the internet. The smartphone, which underpinned so much of the tech industry’s boom over the past decade, [is maturing, with incremental innovation and flagging sales](#).

And the law of large numbers, combined with the tech industry’s history of upstarts leapfrogging incumbents on innovation, compels executives to seek out new places to disrupt, lest they themselves be disrupted. “Their perspective is: We have to keep the growth,” says Tim Kendall, a former senior executive at Facebook and Pinterest Inc.

who now runs Moment, an app to help manage smartphone use. Mr. Kendall says the need to diversify is all the greater because regulatory concerns make it risky for giants to bet on growing their share of the markets they already dominate. “The current regulatory climate is such that all of them are saying, ‘We can’t acquire growth into our core business because the [Federal Trade Commission] will block it.’”

Mr. Zuckerberg in an interview with the Journal last week emphasized the significance of Facebook’s changes, calling his plan to build out less-public communication networks “the beginning of a new chapter” and attributing some of the recent executive departures to the magnitude of the switch. But he and other tech leaders aren’t panicking. Google and Facebook are still winning the vast bulk of new online-ad dollars. The revenue growth number that so spooked Google investors was 17%—most companies would love that. Executives insisted to anxious analysts that they’re optimistic about the opportunities ahead. Apple served up a relatively rosy outlook for its current quarter.

Many investors, for now, are focused more on the opportunities than the risks. Apple is on course to regain the \$1 trillion market capitalization that it hit last August, when it became the first U.S. company to cross that threshold. Microsoft Corp., which itself has thrived in recent years by upending its former business model, closed above \$1 trillion for the first time on Tuesday. Facebook’s stock has gained almost 50% this year, and Alphabet’s was at a record high just before last week’s lurch down.

Amazon.com Inc. won a vote of confidence last week from Warren Buffett’s Berkshire Hathaway Inc., which recently took a stake in the e-commerce giant. Jeff Bezos’ well-documented allergy to complacency has made Amazon a Big Tech forerunner in diversification. It launched a cloud-computing business 13 years ago that delivered almost 60% of its operating profit last year, and has built big operations in entertainment and groceries.

But even at Amazon, revenue growth in the latest quarter was its slowest rate in four years (also 17%). Profit more than doubled, as advertising, a business it has been expanding aggressively, helped offset weaker growth in the core online retail operation. “There is a theme emerging here: There is reasonable doubt about just how much low-hanging fruit is left for the largest tech companies,” Ben Thompson, a former tech executive who now runs research firm Stratechery, wrote to clients on Thursday. “Apple has sold the world iPhones, Google has stuffed mobile search, and now Amazon has seized the obvious parts of e-commerce; what comes next is much more difficult and expensive.”

The companies have been laying the groundwork for their more varied futures for a while. The engines of Facebook’s pivot to messaging are WhatsApp, which it bought in 2014 for \$19 billion, and Messenger, which it launched three years earlier. Apple started amping up its services push several years ago.

Still, as they stretch into new domains, tech’s titans increasingly bang into each other. Amazon’s advertising effort is impinging on Google and Facebook, both of which are also muscling up against Amazon in e-commerce. Facebook’s messaging shift threatens Apple, whose

Messages app is important to its services push. So do Amazon and Google's forays into hardware.

Apple's Hollywood campaign encroaches on Amazon, which already spends billions of dollars annually producing entertainment. Peter Barrett, a veteran tech executive who co-founded venture investor Playground Global, says the shifting business models could reorder the dominance of the tech giants. The rise of new technologies like voice assistants that build on or displace the smartphone will help determine which established companies—and which new players—thrive. "Some will make the transition," he says, "and some will see their power eroding." — *Wall Street Journal*

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The **Federal Communications Commission** has issued a warning about robocalls that has consumers racking up big bills. Scammers behind "One Ring" or "Wangiri" robocalls try to get people to call the number back, "often resulting in per minute toll charges similar to a 900 number," according to the FCC. People are being urged to not call back these numbers, which are using the "222" country code of the West African nation of Mauritania, the FCC said. The scammers often call multiple times in the middle of the night, hanging up after a ring or two in hopes that the person calls back and "runs up a toll that is largely paid to the scammer," the FCC said. — **Associated Press**

