



Tech Breaking News

Sep 17 – Sep 21, 2023





5G

Will 5G operators
restart network
spending in 2024?





LightRe



Broadband

Google Fiber's
new innovation
hub explores
what's next for
Broadband



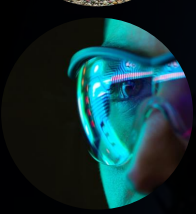
speed to/in the home,
reliability, access,
and service





Wireless

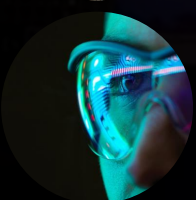
Study makes the
case for spectrum
sharing

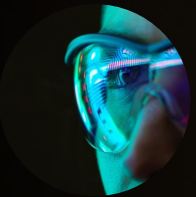




Security

Huawei hacked by US,
claims China spy
agency





Finance

Cisco drops \$28 billion
on Splunk acquisition



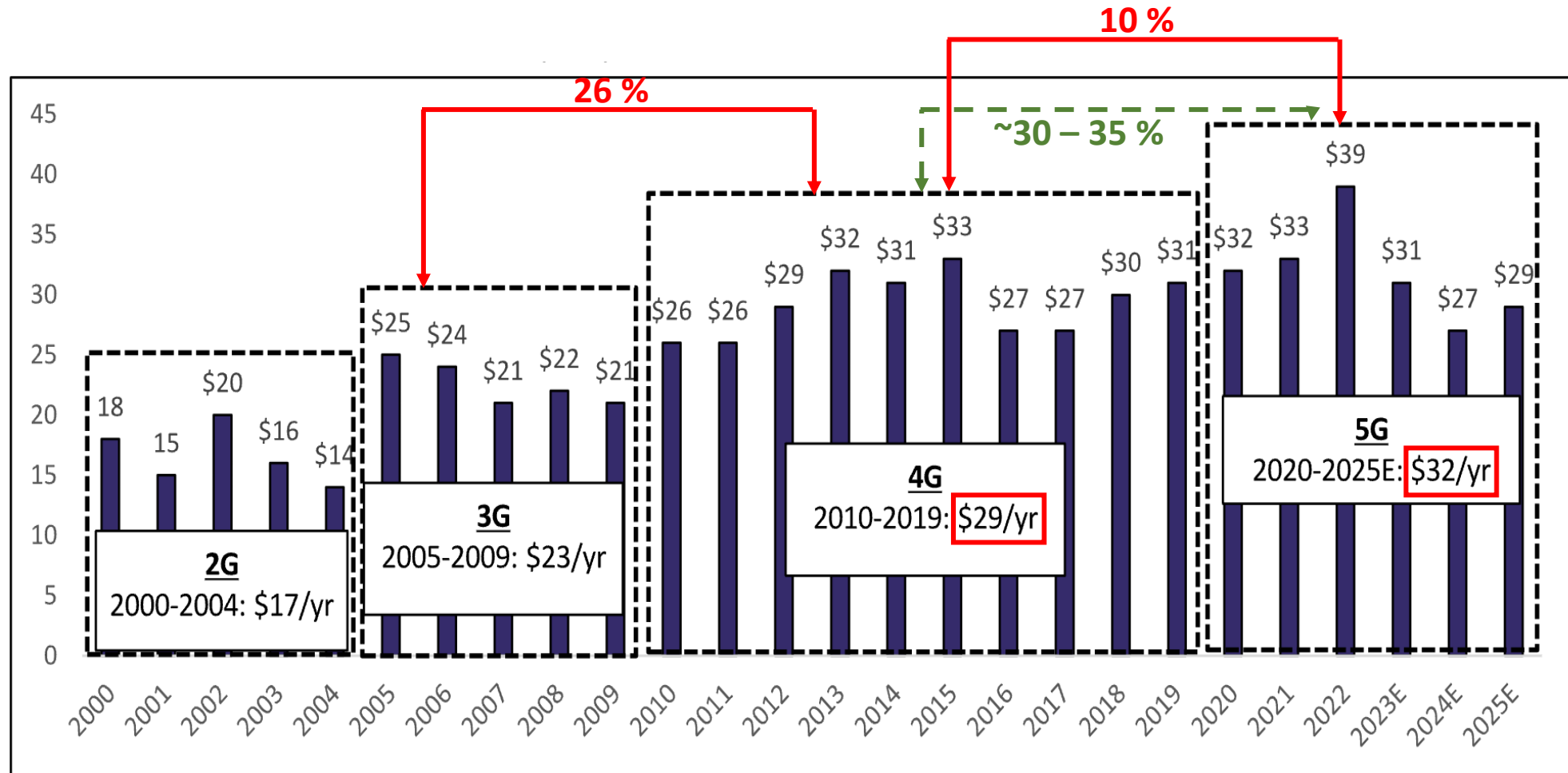


Automation

Nokia maps out AI/ML
automation path for
broadband operators



Will 5G operators restart network spending in 2024?



Source: CTIA, American Tower, and Wells Fargo Securities LLC estimates

Will 5G operators restart network spending in 2024?



T Mobile™






\$230 billion in wireless capex and spectrum licenses from 2020 to 2023


Yet, the operators have only grown wireless EBITDA (earnings before interest, taxes, depreciation and amortization) by ~\$10 billion, the majority of which has come through cost-cutting synergies from the Sprint/T-Mobile merger.




Google Fiber's new innovation hub explores what's next for Broadband

 Google Fiber

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 Forough

Now introducing

 GFiber Labs

[No Title]


What's next for internet?

GFiber Labs is our hub for ideas and the development of technology dedicated to transformative internet experiences.

This is more than just our products.

We're bringing together efforts from across the company to accelerate speeds to and in the home, redefine customer service and expand access so we can bring multi-gig speeds to all.

And that's just the beginning.





Cisco drops \$28 billion on Splunk acquisition

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Cisco to Acquire Splunk, to Help Make Organizations More Secure and Resilient in an AI-Powered World

September 21, 2023



News Summary

- Together, Cisco and Splunk will help move organizations from threat detection and response to threat prediction and prevention
- Combined, Cisco and Splunk will become one of the world's largest software companies and will accelerate Cisco's business transformation to more recurring revenue
- Expected to be cash flow positive and gross margin accretive in first fiscal year post close, and non-GAAP EPS accretive in year 2. Will accelerate revenue growth and gross margin expansion
- Unites two "Great Places to Work" with similar values, strong cultures, and talented teams
- The combination of these two innovative leaders makes them well positioned to lead in security and observability in the age of AI

