



Your Weekly guide in a Changing World.
Written and edited independently by Barry Neethling
Sponsored by First Technology Group

5th October #187

New for this Week

- As a user of Microsoft technologies, you are receiving this publication to stay informed about critical topics such as Microsoft licensing, price increases, end-of-life dates, technical updates, security notices, and more.
If you do not want to continue receiving TOP STORIES, click on the unsubscribe link at the bottom of the mail.
- **Another 3 New vendors: MindManager, PPO & Nuance Dragon** are added.
- **DarkWeb Weekly Intelligence Report #187** - The bad guys are very smart!
- **No Screen** - Who needs a screen? Images projected on your retina
- **Excel changes the rules** - A single Cell will hold a list
- **Memory shortages to 2030** - We are going to buy hardware differently
- **Azure Hybrid Virtual Desktop** - watch the licensing
- **M365 A7 & G7 announced** - Be careful of the licensing!
- **Licensing resources updated** - everything updated for October
- **The License is just the start** - Now you have to start consuming
- **Excel Canvas** - Now you can tell CoPilot what you want!
- **Teams enables file sharing** - Federated companies allowed
- **Badge is Fake, the Fear is Real** - Bad Guys acting as Good Guys
- **Another M365 Phishing attack** - Winning formula - why stop?
- **AI compute getting Cheaper faster than Moores Law** - Whats that??

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Subscribe to Top Stories

DarkWeb Executive Report #187

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BUI scans the DarkWeb continuously for Hacker signals and Ransomware attacks.

Click above for the report from our live dashboard that we will publish weekly (but is actually updated continuously). This is part of the DarkWeb monitoring services included with many of BUI's managed services offerings. **This report is live, and this is a "snapshot" of the top 10 events as of Sunday Afternoon.**

Last Week's Top Stories

SignUp for the Archive

You can click the top button for last week's edition or sign up for access to the archive with AI assistance to read from #1

Newest additions to FirstMarketPlace

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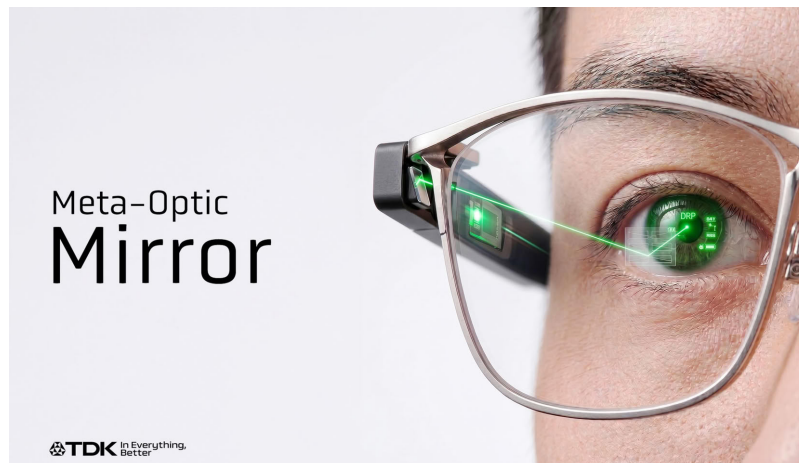
MindManager
PPO
Nuance Dragon

Are added for this week.
Click the link above for more information on these vendors

New Movies for this week

Avengers Endgame Encore is doing very well and worthwhile going to see in anticipation of Doomsday.

WARNING!! The trailer for Ice Cream Man is really hectic!!!



No Screen at all!

This is a story about how scientists are learning how to control light itself.

In TOP STORIES #185 I featured HKC's enormous 83.4" curved monitor. The following week, in #186 I looked at Meta putting a virtual workspace into lightweight glasses.

Now TDK is taking things another step..... projecting the image directly onto your retina.

No conventional display panel, and nothing implanted in your eye.

TDK, working with QD Laser, is developing a system that scans laser light through the pupil to create the image on the retina.

The particularly interesting new development is its meta-optic mirror, a layer only around 150 nanometres thick that can be embedded into the spectacle lens and used to steer the light.

BUT..... the idea of steering light is definitely NOT new.

Nearly 40 years of steering photons

Texas Instruments invented the Digital Micromirror Device, or DMD, in 1987, putting millions of microscopic mirrors onto a chip to control where light goes. DLP went on to transform digital cinema, eventually combining those microscopic mirrors with enormously powerful RGB laser light sources. Barco has taken the concept even further with its HDR Lightsteering cinema technology, which you can [read more about here](#). Instead of simply illuminating every part of an image equally, it dynamically redistributes light, concentrating photons where bright highlights are required while keeping dark areas much darker. So today's most advanced cinema projectors are already doing something incredibly sophisticated..... Generating, modulating and steering photons to put light exactly where it is needed. **TDK is taking that same broad concept and shrinking the optical journey from metres to millimetres.** Instead of steering laser light through a cinema projector and lens onto a huge screen..... miniature lasers, light steering and meta-optics could ultimately steer the image directly into your eye to match the maximum resolution your eye can resolve, which is not as high as you may think, and that too is another story about whether an 8K screen is actually money well spent (or not).

These technologies, albeit different, are part of the same technological journey

DMD → laser projection → HDR Lightsteering → retinal projection.

Don't throw your monitor away yet!

TDK's current meta-optic demonstration is still monochrome, with full colour and mass production still ahead.

There are also substantial challenges around keeping the beam correctly aligned as your eye moves, field of view, brightness, battery life, heat, comfort and, obviously, laser safety.

So this is early technology..... NOT something you are going to order next week, but the direction is fascinating.

It has taken nearly 40 years of learning how to control photons more precisely..... until eventually the screen itself may no longer be required.

And even THAT may not be the end of the story.

Light Field Lab is taking photon manipulation in another direction entirely, reconstructing wavefronts so that 3D objects appear to exist in space without glasses or a headset, but that is a story for another day.

TDK Demonstrates Retinal Projection

Memory shortage to 2030? The PC buying rulebook may be changing



TOP STORIES has been warning about the memory squeeze for a long time. Unfortunately, the news is getting worse.

Micron now says memory and storage supply will be even tighter in 2027 and 2028 than in 2026. More than 75% of its 2027 production is already committed, while new capacity coming online in late 2028 will still take time to ramp.

And 2028 may NOT be the end.....

SK Hynix has gone further, suggesting the shortage could persist through the end of 2030.

That is not a certainty. Additional Chinese production, weaker demand or another semiconductor downturn could change things. But this is increasingly looking less like another short memory cycle and more like a structural change in the supply chain.

And that raises another interesting question..... who really makes your computer?

Names such as Tongfang, Clevo, Quanta, Compal, Wistron, Pegatron and Foxconn mean very little to most computer buyers, yet companies like these form much of the ODM and contract manufacturing ecosystem behind the global PC industry.

An **ODM**, Original Design Manufacturer, can design and manufacture an entire computer platform which is then customised, qualified and sold under somebody else's brand.

It means the famous logo on the lid does not necessarily identify the company ACTUALLY assembling it.

This has always been how much of the electronics industry works, including LCD screens..... but that is another story.

What may change is how closely customers examine the markup between the underlying hardware and the finished branded product.

Harder Questions

If component shortages continue towards 2030, buyers are going to ask harder questions..... **what exactly am I paying the premium for?**

There are VERY good answers, so DO NOT rush out and start buying unknown computers just yet.....

Dell, HP and Lenovo do far more than put a badge on an ODM computer.

Enterprise customers are paying for controlled configurations, qualified components, BIOS updates and firmware management, drivers, security, international warranties, spare parts, predictable product roadmaps, fleet management and support years after the machine was purchased.

For organisations managing thousands of endpoints, that has considerable value.

What's changing is that the value can no longer simply be assumed.

Apple has already spotted something happening at the other end of the market.

The MacBook Neo starts at just US\$599, deliberately opening the Mac ecosystem to buyers who previously might never have considered Apple. Instead of forcing every buyer up into a MacBook Air, Apple created a lower-cost product for users who simply do not need everything the premium machine provides.

That is an important change in product selection behaviour..... buy what the user actually needs, rather than automatically buying the traditional product above it.

Others are already responding, with new Windows machines being positioned directly against Neo.

The same thinking could spread into corporate hardware procurement.....

- Does every employee require exactly the same premium business notebook?
- Does every device need to follow the same three or four-year replacement cycle?

Premium enterprise devices will remain important where support, security and lifecycle management justify the premium.

Other users may increasingly be served by longer refresh cycles, alternative form factors, refurbished equipment, simpler configurations or hardware much closer to the ODM end of the market.

**That does NOT mean buying unknown computers because they are cheap.
It means understanding where the value really sits.**

The computer industry may increasingly move from buying a brand to buying the appropriate level of lifecycle assurance for each user, with attention moving to how many resources the user is consuming from a licensing perspective....

Premium brands are not going away..... but increasingly, the premium will need to be proved, rather than simply accepted.

If the memory squeeze really does extend towards 2030, buying computers the way we always have may become one of the first assumptions that needs to change.

Micron: Memory squeeze to last 2028 - and beyond

Microsoft News

Microsoft Azure Virtual Desktop Hybrid GA

But..... watch the licensing!

Microsoft has made Azure Virtual Desktop Hybrid generally available, allowing organisations to keep AVD session hosts on their existing on-premises infrastructure, or infrastructure operated by an Authorised Outsourcer, while using Azure for the AVD control plane and management.

The interesting part is that you do NOT need to replace your existing virtualisation platform. Microsoft specifically highlights VMware vSphere, Nutanix AHV and Hyper-V. Azure Arc connects the session hosts to Azure, while users continue accessing desktops and applications through Windows App. This makes it particularly useful where data residency, regulatory requirements, latency or simply the desire to sweat existing infrastructure makes an immediate move to Azure impractical.

You still need the appropriate Windows or RDS user entitlement, such as a qualifying Microsoft 365 licence, AND Microsoft requires an additional Azure Virtual Desktop Hybrid service user licence, charged per user per month. Your compute, storage and networking costs remain on your infrastructure.

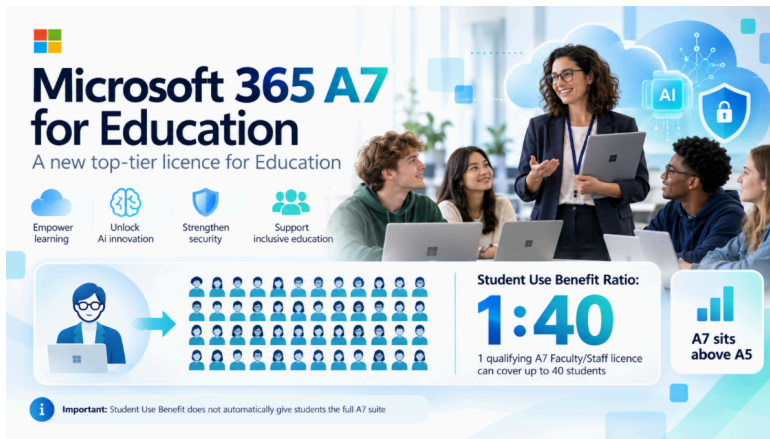
There are also important differences from cloud AVD.

Windows Enterprise multi-session is NOT supported, and Hybrid does not currently provide AVD power management, Autoscale, Start VM on Connect or Session Host Configuration.

Those session hosts remain your responsibility to provision and manage.

So this is a very useful new option, particularly as a bridge between traditional VDI and cloud desktops, but the architecture AND licensing need to be properly modelled before assuming it will be cheaper.

Please contact your First Technology Group account manager to connect with FTG's Microsoft, Azure and licensing specialists to assess whether AVD Hybrid fits your environment and, importantly, calculate the real cost before deploying it.



Microsoft 365 A7 & G7

Microsoft expanded its new top-tier licensing family on 1 October 2026, adding Microsoft 365 A7 for Education and Microsoft 365 G7 for US Government Community Cloud customers.

A7 now sits above A5. Microsoft's A7 Faculty offering builds on A5 with Microsoft 365 Copilot, Agent 365, Microsoft Entra Suite and Intune Suite. There is also a separate paid A7 Student offering with additional student security capabilities.

The Student Use Benefit - 1:40, BUT read the small print! This is where Education licensing gets interesting.

For every qualifying paid Microsoft 365 A7 Faculty/Staff, Education Qualified User or Knowledge Worker licence, Microsoft provides up to 40 Student Use Benefit instances under the applicable EES or CSP academic programme.

So, very simply...

100 qualifying paid staff licences could provide Student Use Benefits for up to 4,000 students.

BUT... those students do NOT automatically receive Microsoft 365 A7 Student. Microsoft's Product Terms specifically define the A7 Student Use Benefit as Office 365 A5 Student Use Benefit + EMS A5 Student Use Benefit + Windows Education A3 Student Use Benefit + Minecraft Education Edition.

The new A7 components such as Microsoft 365 Copilot, Agent 365, Entra Suite and Intune Suite are therefore not included in that 1:40 Student Use Benefit.

There is another issue. Mixed A3, A5 and A7 licensing can change which level qualifies for the Student Use Benefit, so simply multiplying your staff count by 40 and assuming everybody gets the highest licence could become an expensive mistake.

Microsoft's 1 October Product Terms update specifically added A7 to both the [Microsoft 365 availability tables](#) and the [Student Use Benefit rules](#).

Please contact your First Technology Group account manager to connect you with their Microsoft licensing specialists to model the Faculty and Student numbers properly before moving to A7. With a 1:40 ratio, getting the licensing model right could make a very substantial difference to the cost.

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Microsoft Subscription Suites Guidance

Microsoft Licensing resources updated October

- The Power Platform Licensing guide has been updated for October and can be [downloaded here](#).

October brings more Copilot related terminology and licensing changes.

Microsoft 365 Copilot is increasingly being shortened to simply Microsoft Copilot, while the guide now includes additional detail covering App building through Copilot Cowork and Copilot Studio.

The new Copilot Managed Runtime name also appears here for Microsoft's hosted infrastructure supporting these Apps.

- **The Dynamics Licensing Guide for October can be [found here](#).**
The big October change is support for headless commerce, allowing businesses to build their own specialised storefronts while still using Dynamics 365 Commerce behind the scenes for pricing, promotions, inventory and order fulfilment.

Microsoft has also introduced two new add-on licences

- Headless Import, for importing completed retail transactions captured outside Dynamics 365 Commerce
- Headless Orchestration, for processing third-party retail transactions through Dynamics 365 Commerce APIs

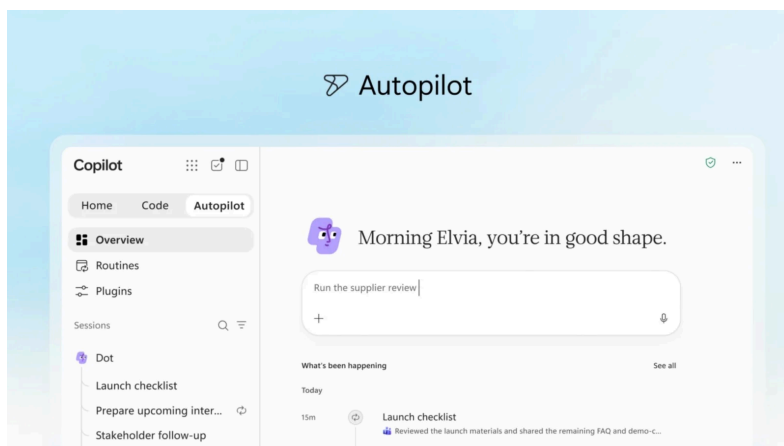
If you run customised retail platforms, this is worth reviewing carefully.

- **The Copilot Studio Licensing guide can be [found here](#).**
App building is the big change this month.
Copilot Studio can now build Apps, in addition to its existing Agent and Workflow capabilities, with the new functionality entering Paid Public Preview.
Microsoft has also changed some terminology. What was previously called the Microsoft-managed host is now the Copilot Managed Runtime Host.
It is another indication that Copilot Studio is expanding well beyond simply building agents.

Microsoft's Copilot, Power Platform and Dynamics licensing models are becoming increasingly interconnected. Contact your First Technology Group account manager to connect with their Microsoft licensing specialists and make sure the changes are understood before they affect architecture or licensing decisions.

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Microsoft: Modern Work Plan comparison Documents



The CoPilot License is just the beginning

Channel Insider has observed something important in Microsoft's new Copilot strategy. Partners are being

pushed beyond simply selling licences.

The opportunity is now deployment, adoption, process redesign, security, governance, building agents, managing costs and, importantly, driving

consumption.

Microsoft calls this FinOps for AI.

I call it keeping a finger on the meter!

As covered in TOP STORIES #184 and #186, Copilot is increasingly becoming licence PLUS consumption.

Advanced AI such as Copilot, Code and Autopilot can consume Copilot Credits depending on the model used, context retrieved, tools called and how long the job runs.

Microsoft is making this increasingly easy to consume. From 1 December, new Microsoft 365 Copilot Business licences bought through CSP will have usage-based billing enabled by default, although administrators can control spending limits.

So buying the licence is rapidly becoming the easy bit.

This is also where the value of dealing with a partner with real scale becomes much more important. There should be no reason to buy the Microsoft licence from one company, then hunt around for somebody else to deploy Copilot, another specialist for security and identity, somebody else to build the applications and agents, and finally another consultant when the consumption bill starts getting interesting.

FTG can provide ALL of it.

FTG's scale provides substantial commercial buying power, but more importantly, FTG has certified specialists across Microsoft licensing, Copilot, Azure, security, identity, application development, adoption and support.

First Digital can help build the workflows and applications around it, while the wider group can deploy, secure, govern and manage the environment.

And most importantly, certified FTG specialist engineers can keep watching the meter.

Getting a good deal on the licence is one thing. Making sure people actually use what you bought, increasing consumption where it creates measurable value, and stopping it running away where it shouldn't, is where the real value lies.

Please contact your First Technology Group account manager to connect you with FTG's Microsoft licensing, Copilot, Azure, security and First Digital specialists. Get the commercial deal, the technical resources and the ongoing consumption management from one place.

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The Value is beyond the License



Microsoft Rolls Out Excel Canvas

Microsoft is rolling out Excel Canvas, a new Copilot feature that turns workbook data into a polished report containing charts, metrics and AI-generated insights.

More importantly, the report is dynamic. Change the underlying Excel data, and Canvas updates the report automatically.

You can then tell Copilot, in plain language, to change the presentation, add information, or refine what it shows.

Rollout starts in mid-October and should be completed worldwide by the end of October for users with access to Copilot in Excel.

This is another example of Copilot moving beyond being a chatbot and becoming embedded into the actual workflow. As Microsoft pushes Copilot increasingly aggressively, this is the type of functionality that can start making the investment easier to justify, assuming users actually know it exists and how to use it!

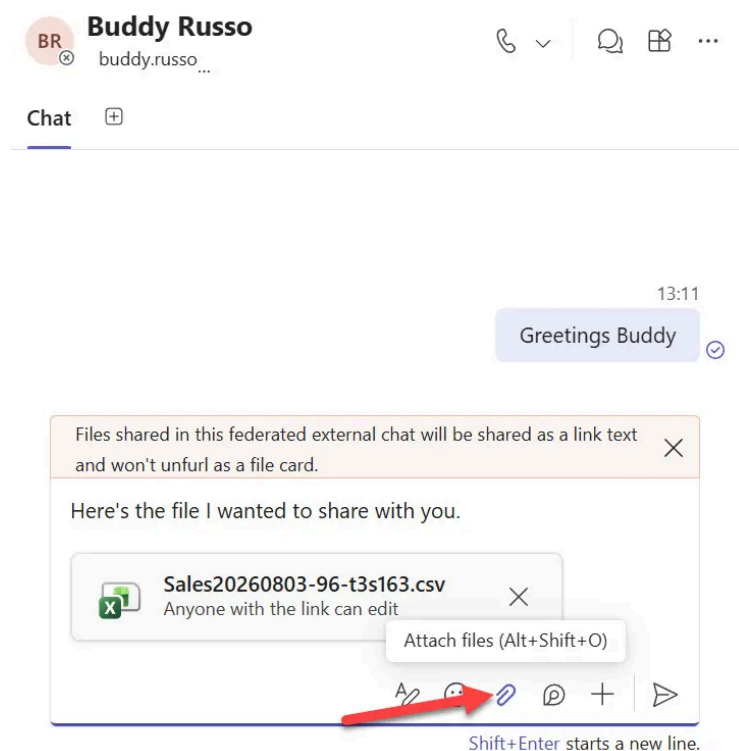
Clearly, AI-generated content must be reviewed and verified by a human, particularly before management reports start making important decisions from it.

If you are paying for Copilot and still mainly using it as a chatbot, you will be increasingly leaving value unconsumed.

Contact your First Technology Group account manager to connect you with their Microsoft and First Digital specialists to review Copilot licensing, adoption and where tools such as Excel Canvas could eliminate repetitive reporting work.

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Microsoft Rolls out Excel Canvas



Teams Enables Easier File Sharing in Federated Chat

It sounds like a small change, but it fixes one of those Teams frustrations that has irritated users for years. From late October, Microsoft is rolling out the ability to attach files directly to one-to-one federated chats with people in other organisations, with Teams automatically handling the sharing permissions.

Until now, the ridiculous workaround was often, "I can't send it to you in Teams, I'll WhatsApp it (conveniently ignoring email)". Convenient perhaps, but now the corporate document has left the governed Microsoft environment and potentially bypassed the organisation's security, retention and auditing controls. Not cool.

The good news is that existing OneDrive, SharePoint, sensitivity label and external-sharing policies still apply, and Microsoft has backed away from its original plan to override organisations that had deliberately disabled federated file sharing.

It is a small feature with a potentially big security benefit, provided it is configured correctly. Contact your First Technology Group account manager to have their Microsoft specialists review your external Teams and file-sharing policies before the rollout.

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Security

The Badge Is Fake, but the Fear Is Real

Authority + urgency + secrecy = STOP and verify.

The FBI has warned about a rapidly growing scam where criminals impersonate police, government officials and other authorities to frighten people into handing over money or personal information.



Nearly 61,000 complaints were recorded between January 2025 and July 2026, with losses exceeding \$1.6 billion. Criminals spoof genuine phone numbers and email addresses, use real officials' names and credentials, and are now using AI-generated video to make the impersonation even more convincing.

Do NOT read "FBI warning" and assume this is an American problem.

The FBI specifically warns that criminals impersonate both US and foreign law enforcement and government agencies.

The same playbook can be localised anywhere, including South Africa, using the identity of SAPS, SARS, Home Affairs, courts or another authority that creates fear and urgency.

And that brings us back to the recurring TOP STORIES security message..... the human remains the weakest link. The attack succeeds because people instinctively react when someone claiming to be an authority says they are under investigation, owe money or could be arrested.

Technology can block a lot, but it cannot completely protect someone who is frightened into complying. Staff need regular, updated and targeted security awareness training that teaches them to stop, independently verify the caller and never use the contact details supplied by the person making the threat.

Contact your First Technology Group account manager to arrange a review of your current security awareness programme and to connect you with FTG's security specialists.

Training needs to evolve as quickly as the attacks do, especially when criminals are now using AI, cloned identities and trusted authorities to manipulate users.

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FBI: Scammers impersonating the Law

Another New Microsoft 365 Attack - Because They Keep Working

Here we go again.

A phishing campaign called CSuite is targeting Microsoft 365 users using fake Adobe, DocuSign, Zoom, SharePoint and other familiar business documents.

What makes this one particularly nasty is that it can attack from two directions. Users can be tricked into approving a real Microsoft device-code login, handing attackers access to their Microsoft 365 account without entering a password into a fake website. Alternatively, they can be persuaded to install legitimate remote management tools such as ScreenConnect or Atera, giving the attacker access to the actual PC as well.

This follows the passkey, GhostCode and other Microsoft 365 attacks covered recently. **The worrying part is not that criminals keep inventing new phishing techniques. It is that they would not keep doing it if they weren't working.**

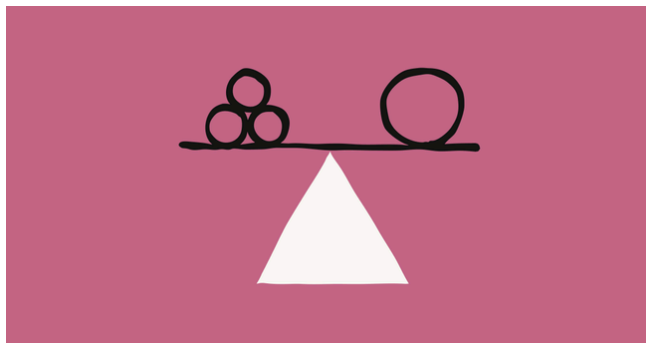
Technology helps, but the human remains the weakest link. Security awareness cannot be an annual tick-box exercise. Training needs to be continuous, targeted and updated as the attacks change, because the criminals certainly aren't standing still.

Please contact your First Technology Group account manager to connect you with FTG's security specialists to review your Microsoft 365 security posture and ensure your staff security training remains current, targeted and relevant to the attacks actually happening now.

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CSuite Phishing Campaign Targets Microsoft 365 Accounts

Cloud & AI



The price of AI is crashing faster than the rate of Moore's Law

Tom's Hardware has picked up some remarkable research from [Epoch AI](#). The cost of achieving a

given level of AI performance has fallen by around 47% every quarter since 2023, equivalent to roughly 13 times cheaper every year. That is faster than the historic cost declines seen in compute ([Moore's Law](#)), DNA sequencing or lithium batteries.

One example makes the point. In January 2025, OpenAI's o3 achieved about 75% on the GPQA Diamond benchmark at an estimated 30 cents per question. Around 18 months later, GPT-5.6 Luna achieved similar performance for \$0.0004, about 725 times cheaper.

There are caveats. These are benchmark results, different AI tasks are improving at different rates and benchmarks can be optimised for. But the direction is difficult to ignore.

And this reinforces the point made in TOP STORIES #184..... AI must be fit for purpose.

You do NOT need the biggest, cleverest and most expensive frontier model to summarise documents, classify information, search internal knowledge, transcribe meetings, analyse images or automate many routine business processes.

Increasingly, you may not need the cloud either.

Microsoft already supports local LLMs through Foundry Local and Windows AI, with models able to run on CPUs, GPUs and NPUs. Once installed, inference can happen

entirely on the device, with prompts and results remaining local. Shared models can also be hosted on infrastructure controlled by the organisation.

That makes cost, latency, privacy and sovereignty part of the model-selection decision. Keep suitable workloads on the endpoint or private infrastructure, use sovereign hosted AI where the data demands it, and call the huge frontier models when the problem genuinely needs an enormous brain.

The future is increasingly NOT one AI for everything..... it is the RIGHT AI for each job.

This is exactly where First Digital can help. Their AI-native applications can operate inside the customer's Microsoft 365 environment, while their private GPU capability provides South African hosted inference for workloads where greater control and sovereignty are required.

Please contact your First Technology Group account manager to connect you with First Digital's AI specialists to assess which workloads should run locally, privately, in Microsoft Azure or against frontier cloud models. Paying for intelligence you do not need is going to become increasingly difficult to justify.

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AI is getting cheaper faster than Moore's Law!

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