

TOP STORIES #100

The Hundreth Weekly Edition.

This edition is special—it's the 100th since I made TOP STORIES a weekly publication! [TOP STORIES #1](#) is here for reference.

The big story of the week is the drama caused by the DeepSeek announcement - I actually [referred to it before it blew up the next day in #99](#))

I have some additional commentary about what has happened this week below..... please read on.....

If you want to invite others to join, they can click [here](#) to subscribe.

New Email address

From next week, I'll be emailing from barry@firsttech.news - please whitelist this address, and if you do not receive TOP STORIES #101 - please let me know at barryn@firsttech.co.za which will continue to work.

Did you Know?

FTG is one of only 30 entities in the WORLD with a certified ISO 19770-1 practitioner for asset management.

FTG has been practising Software Asset Management for over 25 years and has accumulated a massive base of experience and capabilities.

Many larger companies worldwide struggle to maintain just one, whereas FTG has over twenty dedicated specialists in three locations!

We work with the world's most recognised SAM systems, such as Flexera/SNOW, Block64, and a **host of internally developed tools**, to collect and make sense of practically any environment across all software vendors, not just Microsoft.

Unlike most other companies in this space, which employ a few people who try to be SAM specialists, we have dozens of fully employed specialists whose combined experience exceeds two centuries!

If you have any SAM or IT Asset Management requirement, no matter how small or big, and you need ALL the necessary certifications and decades of experience to support you, please contact your First Technology account manager to connect you with the Team most suited for your requirements.

Hardware

NVIDIA RTX 50 series sold out

NVIDIA's entire inventory of RTX 50 series GPUs sold out in just 20 minutes! It looks like the shortage will last [for a while](#).

Intel on track for Panther Lake in 2025 and Nova Lake in 2026

It looks like Intel's next-gen CPUs will be in full production before the end of 2025, but many details are still missing.

What's clear is that as soon as you have started to get comfortable with Lunar Lake based machines shipping, the next generation will be ready, which you can [read more about here](#).

Because of these accelerated release cycles, planning your hardware refreshes and keeping your specifications up to date to ensure you get the latest hardware at recent pricing, it is important to ask your First Technology account manager to connect you with our Hardware specialists to assist with the planning and writing up a comprehensive RFP.

Microsoft

Licensing Briefs updated January 2025

Microsoft has published three updates for 2025, which you can [find here](#).

The documents are:

1. [Microsoft Defender licensing Guidance](#)

2. Microsoft 365 Apps | Licensing Guidance

3. Client Access Licenses (CAL) Suite Bridges | Licensing Guidance

Of the three, **Defender Licensing guidance** is the most important for familiarising yourself with.

Please contact your First Technology account manager to help you understand these documents, how the licensing affects you based on your agreement, and what you may want to consider including in your BOM going forward.

The DeepSeek R1 671B model is available in Azure AI Foundry (and OpenAI o3 mini)

Microsoft surprised everyone by announcing that it is already hosting the model in Azure and that smaller distilled flavours will be available for developers on CoPilot+ PCs. You can read [more about this here](#).

Directions on Microsoft has [published an article about Microsoft making DeepSeek R1 available](#). Microsoft insists that it is not afraid of DeepSeek and will continue to invest heavily in the cloud because as costs fall, demand will continue to increase.

The Open AI o3 mini model is also now available on Azure. You can [read about that here](#).

Security

DeepSeek Data breach

Some of the attention DeepSeek is getting is certainly not welcome, as a [database containing sensitive information has been exposed](#). This is a sobering reminder that you can never take your eye off the security ball.

Especially when it comes to AI, which depends on vast amounts of data to be clever, security is more important than ever.

It is crucial to start preparing your environment for AI, as with all these new developments, AI is going to become relevant far faster and cheaper than what was initially expected.

Please contact your First Technology account manager to connect you with our Security Specialists to start working on a plan to assess your environment and start categorising and securing access to the data before an AI is let loose on it!

Cloud & AI

DeepSeek is out - Now What?

Just more than two years ago, ChatGPT changed the world. Now, just into GPT's third year of public existence, DeepSeek completely changed the world again. Not even a week later, the world changed AGAIN with the announcement of even more efficient models (read on). This has been a tumultuous week that threw markets into a tailspin, and now, a week later, the drama is not letting up.

What we need to do now is take a deep breath and try to unpack what has happened with a commitment to NOT MAKING ANY IMMEDIATE BIG DECISIONS about anything to do with AI.

With CoPilot at the endpoint, it is still "business as usual" (for now).

The dust is still settling - **now is not the time to make long-term decisions**; but instead to observe, consider, ponder, debate and THEN act.

What is a good idea? [rethink spending money \(especially if it is a lot\) based on information about AI that is more than 2 weeks old](#).

Spinning up your OWN LLM on more efficient resources could be a very good plan to start with - Here is a [YouTube tutorial on getting the full LLM up and running](#) (with challenges). 2 weeks ago, that would have been considered impossible.

Clearly, most people will need help to do this, and we have the teams to do exactly that!

You can also [spin it up in Azure](#) with less effort.

It does not matter [how DeepSeek came into existence](#), the fact is that it is here, and is able to give you ChatGPT capability on a fraction of the resources you thought you needed. Suddenly, what you thought you had to pay for is practically free!

This has everybody scrambling, and even more efficient models such as [Tulu](#) and [Qwen 2.5](#) have been announced that exceed DeepSeek's capability.

Microsoft has scrambled to make OpenAI's o1 model free and on top of that made some DeepSeek models available on CoPilot+ PC's.

OpenAI, in turn, has made [o3 freely available](#).

Suddenly, scarce and limited computing capacity has become "available". Strange..... All the other major corporations are in the same situation as Microsoft. What all this means is that AI, as we have experienced it, will be run much more efficiently and cheaply than we have been led to believe. AI is going to get a lot smarter, way faster and cheaper than what we could have ever imagined - the world is going to change REALLY fast! I [urge you to watch this YouTube video](#), and ponder the consequences of the work that has been done at Berkley.

[Here is Sam Altman's response](#) to the DeepSeek challenge. There is going to be a lot more "responding". This is just the beginning of the next stage of AI development.

With so much changing and so much noise making it hard to separate fact and real value from speculation and hype it is REALLY important to be speaking to people that have been experimenting with AI models for years. PLEASE contact your First Technology account manager to connect you with our AI specialists to help navigate a path for you going forward which may be completely different from what it was a week ago!

What's up at FTG

Navigating the Cloud: Life Healthcare's Seamless Transition, With Support From BUI

With 63 healthcare facilities in southern Africa, the security of Life Healthcare's data is paramount. A move to the Azure Cloud, facilitated by BUI, became the clear and strategic choice.

As a leading South African private healthcare provider, Life Healthcare plays a key role in the health of our nation. While their primary business occurs in wards, theatres and consulting rooms around the country it is underpinned by a solid IT foundation.

Read more about how BUI enabled Life Healthcare's move to the cloud..... [Navigating the Cloud: Life Healthcare's Seamless Transition, With Support From BUI - BUI](#)

Cloud Backup for Microsoft 365 powered by First Technology Group

Join us for a Webinar on a 365 Cloud Backup service tailored to meet the needs of businesses of all sizes. This service provides a reliable and scalable solution for data protection.

It leverages advanced encryption and access controls to safeguard sensitive information, ensuring data integrity and confidentiality. Additionally, the service includes automated backups, helping organisations comply with industry regulations and standards.

When: 6 Feb at 10:00am - 10:45am

Where: Online Webinar

[Register Here](#).

CoPilot Security Demo

BUI, FTG's security division, can present CoPilot for Security information-sharing sessions, workshops and demos.

In light of ongoing attacks that will only get sneakier, it is essential to contact your First Tech Group account manager to arrange to attend a session. You can also [request a session here](#).

What does a World Class SoC look like, and how does it work?

You are invited to book a tour of one of our SoC (Security Operations Center) nodes (and there are still parts we can't show you). You can [book for the tour here](#).

BUI blog - 4th Video Available

FTG's Azure and security division, BUI, has launched a blog focused on Security—what's new, what's changed, and what you need to do to maintain a sound security posture. The 4th Video in the series is [available here](#). **This video covers some of the Purview announcements at Microsoft Ignite 2024.**

Movies

Now Playing: [Flight Risk](#) (This one looks to be good and short - 90mins - audiences are liking it)

Now Playing: [Anora](#)
Now Playing: [Companion](#)
Now Playing: [Maria](#)
7 February: [One of Them days](#)
7 February: [Dog Man](#)
7 February: [The Brutalist](#)
7 February: [Love Hurts](#) (looks like fun)

Movies for 2025

There is a great lineup for 2025 - [IMDB has updated the schedule](#).
The first big release for the year is Captain America.

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