Guidance on Microsoft's Shape the Future initiative

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This guidance is for schools and colleges in England that want to access a discount on Windows® 11 Pro (National Academic only) (Standard) software through Microsoft's Shape the Future initiative.

Overview

The Department for Education (DfE) has worked with Microsoft Education UK to enable eligible schools and sixth form colleges in England to access the Microsoft Shape the Future initiative.

The initiative provides eligible institutions with a discount on Windows® 11 Pro (National Academic only) (Standard) software when they buy devices from participating manufacturers, including, but not limited to:

- Acer
- ASUS
- Dell
- HP
- Lenovo
- Samsung

Eligible institutions are those recognised as a "K–12" academic institution by Microsoft. In England, these are:

- primary schools
- secondary schools
- multi-academy trusts and
- sixth form colleges
- all-through,
- special schools
- alternative schools
- secure children’s homes

To qualify as an eligible institution, schools and colleges must be listed in Appendix A - Eligible Education Institutions 2026. Institutions that only provide Early Years Foundation Education or Higher Education are not eligible to access the initiative.

The initiative is open until 19 June 2028.

How to access Shape the Future

To access the Shape the Future initiative, an institution must:

1. Confirm it's recognised as a "K–12" academic institution by ensuring it's listed in Appendix A - Eligible Education Institutions 2026.

2. Undertake its own due diligence and conduct a compliant procurement process when buying hardware devices.

3. Notify prospective suppliers that they're eligible for Shape the Future Initiative pricing and provide a copy of the Shape the Future Letter of Eligibility for Department for Education England (20427B) and Appendix A - Eligible Education Institutions 2026 when
    - sending out a Request for Information
    - accepting any quotation
    - awarding a contract to a successful bidder
    - submitting an approved order/contract for Windows® 11 Pro (National Academic only) (Standard)
    - buying from a catalogue

4. Allow the selected supplier to check the institution's eligibility and apply the discount to Windows® 11 Pro (National Academic only) (Standard) licenses to the overall cost of the purchase.

5. Retain a copy of their:
    - accepted quote/bid
    - reseller details with selected OEM
    - shipment/delivery records
    - any other documentation that demonstrates proof of receipt

Microsoft reserves the right to request proof or receipt. Microsoft also reserves the right to undertake a "spot check" to ensure that the institutions accessing the initiative are included in Appendix A - Eligible Education Institutions 2026.

Terms and conditions

Eligible institutions can choose from a variety of education-focused Windows devices that are designed to meet the demands of everyday classroom use. These include Tablets, 2-in-1 and convertible devices, Notebooks, Desktop PCs, All-in-One devices.

Under the terms of the Shape the Future initiative:

- eligible institutions may procure devices through a compliantly appointed authorised supplier or reseller, with devices pre-installed with Windows® 11 Pro (National Academic only) (Standard), or any equivalent product

- the initiative supports the distribution of licences to eligible institutions from 19 June 2026 until 19 June 2028

- eligible institutions must still comply with Procurement Act 2023 (PA 2023) / Public Contract Regulations 2015 (PCR 2015) and their own procurement policies when sourcing devices – nothing in this guidance exempts eligible institutions from their obligations under the applicable procurement legislation, school/ academy trust requirements, financial regulations, internal procurement procedures and any other applicable regulation or policy

- eligible institutions may use any lawful procurement route available to them, including existing framework agreements where appropriate – access to Shape the Future does not constitute a procurement route itself, so it does not exempt eligible institutions from any legal, financial or internal obligations as above

- all devices supplied through participating suppliers must meet the hardware requirements for Windows® 11 Pro (National Academic only) (Standard)

- licences may only be distributed as part of the Shape the Future initiative to eligible institutions that are:

    - recognised as a “K–12” academic institution (primary schools, secondary schools, multi-academy trusts and sixth form colleges in England, including all-through, special schools, alternative schools and secure children’s homes) and
    - are listed in Appendix A - Eligible Education Institutions 2026

- Microsoft may request evidence of licence receipt, such as a supplier invoice, shipment record, or equivalent documentation

Disclaimer

It’s up to each school or college whether they choose to access the Microsoft Shape the Future initiative.

DfE is not recommending or endorsing any particular supplier, reseller or product. Decisions about software procurement remain entirely with individual schools or colleges.

Schools and colleges are not obliged to accept any quotations/bid. Any contract will be between them and the compliantly procured supplier or reseller.

DfE cannot guarantee availability, pricing, supplier participation, stock levels, fulfilment or licensing outcomes, which all remain at the discretion of Microsoft and participating suppliers.

Schools and colleges must undertake their own detailed due diligence, including ensuring they're recognised as a “K–12” academic institution and are listed in Appendix A - Eligible Education Institutions 2026 as an eligible school.

Schools and colleges must undertake a fully compliant procurement process to secure an appropriate supplier to access this initiative.

Schools and colleges accessing the initiative must provide a copy of the Shape the Future Letter of Eligibility for Department for Education England (20427B) to prospective suppliers. They must also confirm they're recognised as a “K–12” academic institution and be listed in Appendix A - Eligible Education Institutions 2026.