

VPPipeline PULSE

This Q4 2025 edition of the VPPipeline Market Pulse presents a market overview based on 94 newly identified transactions and a forecast of 458 expiring contracts emerging over the next 24 months. The current transaction landscape is headlined by major 'Staffing & Hiring' framework agreements, including significant awards from Politie Nederland (<€1.2B) and Belastingdienst (<€983M), alongside a substantial (<€504M) Assets & Licensing contract for ProRail. While huge public tenders dominate the recent transaction volume, our expiration analysis highlights a different focus for the upcoming pipeline. The data indicates that 'Managed Services & Outsourcing' represents the largest share (50%) of contracts expiring within the next two years, followed by Assets & Licensing (28%). This summary highlights the primary market trends; the detailed transaction register and specific expiration calendar are available for vppipeline.com subscribers.

Q4 Transaction Activity per segment

94

New Contracts

October
29

November
20

December
45



9

New Contracts

Staffing & Hiring

Flexible staffing, brokerage, and secondment on an hourly basis.



14

New Contracts

Consulting & Projects

Strategic advice, digital transformation, Data, AI, and software development.



43

New Contracts

Managed Services & Outsourcing

Outsourcing, SLA-based management contracts, and Security Services (SOC).



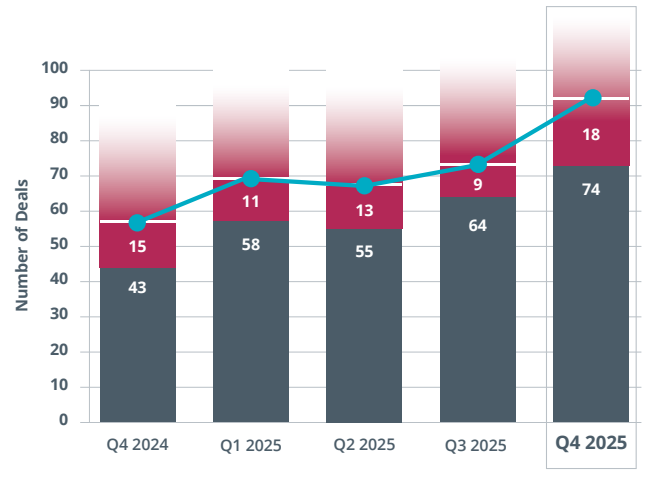
28

New Contracts

Assets & Licensing

Hardware delivery, standard software, and license management.

Transaction Volume Trends



Source: EU TED, trade journals, news, suppliers, and customer websites.

Major Public Sector Awards

#1



Politie Nederland

Framework Agreement for Intermediary Services

< 1,192m €

STAFFING & HIRING

🏆 Circle8, Harvey Nash

🕒 TERMS STRUCTURE 3 + 3 years 📅 BEGIN 01-11-2025

#2



Belastingdienst

Framework Agreement for Hiring ICT Professionals

< 983m €

STAFFING & HIRING

🏆 Between, Cim Solutions, Circle8, Flexvalue, ItaQ, LinkIT, Need Staffing, SopraSteria, Synprofs, Yacht

🕒 TERMS STRUCTURE 4 years 📅 BEGIN 01-01-2026

#3



ProRail

Framework agreement for standard software reseller

< 504m €

ASSETS & LICENSING

🏆 Bechtle

🕒 TERMS STRUCTURE 4 + 2 + 2 years 📅 BEGIN 01-11-2025

Future Pipeline (24 months)

458

Expiring Contracts
TOTAL VOLUME

Total pipeline of opportunities becoming available within 24 months.

[Expiration calendar →](#)

Distributed across 4 segments



48

Expiring Contracts
10% share

Staffing & Hiring

Flexible staffing, brokerage, and secondment on an hourly basis.



53

Expiring Contracts
12% share

Consulting & Projects

Strategic advice, digital transformation, data, AI, and software development.



231

Expiring Contracts
50% share

Managed Services & Outsourcing

Outsourcing, SLA-based management contracts, and Security services (SOC).



126

Expiring Contracts
28% share

Assets & Licensing

Hardware delivery, standard software and license management.

Deal Value Distribution

Segment	Number of expiring contracts by value range €m					Value not disclosed	Total
	0 - 10	10 - 30	30 - 50	50 - 100	> 100		
Staffing & Hiring	13	8	11	5	4	7	48
Consulting & Projects	11	5	2	0	2	38	58
Managed Services & Outsourcing	95	14	7	2	6	102	231
Assets & Licensing	69	28	1	3	5	20	126
Total	188	55	21	10	17	167	458

Visual representation of value ranges across segments for expiring contracts in the next 24 months

ABOUT VPPipeline INTELLIGENCE

VPPipeline is an independent platform specialized in mapping the IT sourcing market in the Benelux. We focus on the systematic monitoring and registration of public and private IT contracts with a total contract value starting from €1 million. For this quarterly report, our database serves as the factual foundation. By accurately tracking contract values, durations, and expiration dates, we provide IT service providers and vendors with a transparent overview of the market. This enables stakeholders not only to analyze closed deals but also to maintain visibility on the future 'pipeline' of expiring contracts and new tenders.

[VISIT website →](#)

Staffing & Hiring — Flexible staffing, brokerage, and secondment on an hourly basis.

PUBLICATION	INDUSTRY	CUSTOMER	PROVIDER(S)	SERVICES	START DATE	TCV
15-10-2025	Government (Central)	Belastingdienst	Between Staffing, Cim Solutions, Circle8, Flexvalue, ItaQ, LinkIT, Need Staffing, SopraSteria, Synprofs, Yacht	Secondment	2026-01	<€983m
24-10-2025	Government (Central)	Politie Nederland	Circle8, Harvey Nash	Secondment	2025-11	<€1192m
24-10-2025	Utilities	Vitens	Hero Interim Professionals	Secondment	2025-11	€20m
24-10-2025	Agriculture	NAK Tuinbouw	DUS-IT, Clavo	Secondment	2025-10	€1m
03-11-2025	Health Care	Erasmus MC	Harvey Nash	Secondment	2025-10	€18m
03-11-2025	Government (Central)	Ministerie van buitenlandse zaken	Bluetrail, Cim Solutions, Hero Interim Professionals, LinkIT, Staffing Now, Synprofs	Secondment	2025-12	€144m
11-12-2025	Education	Sivon	Onefellow, Flinter	Secondment	2025-12	<€13m
19-12-2025	Utilities	Vitens	Circle8	Secondment	2025-10	€50m
22-12-2025	Transport	Vervoerregio Amsterdam	Flextender	Secondment	2026-01	<€17m

Consulting & Projects — Strategic advice, digital transformation, Data, AI, and software development.

PUBLICATION	INDUSTRY	CUSTOMER	PROVIDER(S)	SERVICES	START DATE	TCV
05-09-2025	Government (Municipalities)	Gemeente Leeuwarden	Sogeti	End User	2025-10	NOT DISCLOSED
15-09-2025	Government (Municipalities)	Gemeente Eindhoven	Ilionx	Application	2025-10	NOT DISCLOSED
14-10-2025	Agriculture	Beekenkamp	SLTN	Infra, Application	2025-10	NOT DISCLOSED
16-10-2025	Logistics and Supply Chain	Royal FloraHolland	Levi9	Secondment, Application	2025-11	NOT DISCLOSED
22-10-2025	Banking & Financial Services	ElipseLife	Comarch	Application	2025-01	NOT DISCLOSED
26-10-2025	Agriculture	Plantion	Beyondr	Secondment, Application	2025-11	NOT DISCLOSED
28-10-2025	Food & Beverage Processing	Van Herk Kaas	Aptean	Secondment, Hardware&Software, Application	2025-11	NOT DISCLOSED
17-11-2025	Metal & Natural Resources	BOAL Extrusion	Beyond Illusions	Application	2026-01	NOT DISCLOSED
18-11-2025	Sustainability & Environment	The Ocean Cleanup	Scheer	Secondment, Application	2025-12	NOT DISCLOSED
18-11-2025	Utilities	Evides	Digital Survival Company	End User	2025-12	NOT DISCLOSED
09-12-2025	Manufacturing	van Raam	Happy Horizon	Application	2026-01	NOT DISCLOSED
11-12-2025	Health Care	Vilans	Info Support	Application	2026-01	NOT DISCLOSED
23-12-2025	Wholesale	Dekker Hout	Troublefree	Application	2026-01	NOT DISCLOSED
30-12-2025	Consumer Products	ADEZZ	Fellowmind	Application	2026-01	NOT DISCLOSED

Managed Services & Outsourcing — Outsourcing, SLA-based management contracts and Security Services (SOC).

PUBLICATION	INDUSTRY	CUSTOMER	PROVIDER(S)	SERVICES	START DATE	TCV
01-10-2025	Government (Provinces)	Provincie Groningen	Unit 4	Hardware&Software, Application	2025-07	€18m
01-10-2025	Government (Central)	Eurojust	KPN	Network, Telephony	2025-10	€1m
02-10-2025	Government (Central)	Politie Nederland	Solvinity	Infra	2025-05	€15m
02-10-2025	Government (Central)	Ministerie van buitenlandse zaken	Finalist IT, Capgemini, Netcompany, Sogeti, CGI	Application	2025-10	€204m
03-10-2025	Marketing and Advertising	Stichting Etherreclame	Intercept	Infra	2025-09	€5m
06-10-2025	Government (Others)	Veiligheidsregio Twente	Relined Fiber Network	Network	2025-10	€1m
08-10-2025	Oil & Energy	Enexis	Axians, Schuberg Philis	Infra, Application	2025-04	€47m
10-10-2025	Government (Central)	SSC-ICT Haaglanden	UbiOps	Infra, Application	2025-11	€5m
27-10-2025	Government (Water Boards)	Waterschap Vechtstromen	TReNT Infrastructuur	Network	2025-11	€4m
28-10-2025	Government (Others)	DCMR	igen Solution	End User	2025-10	€3m
31-10-2025	Education	Gilde Opleidingen	Vodafone	Network	2025-11	NOT DISCLOSED
04-11-2025	Oil & Energy	EBN Energie Beheer NL	Pink Elephant	Infra, End User	2025-07	€13m
06-11-2025	-	Kansspelautoriteit	IO Digital	Infra, Application	2025-11	NOT DISCLOSED
07-11-2025	Government (Municipalities)	De Connectie	Bit Internet Services	Infra	2026-04	€4m
07-11-2025	Government (Others)	Veiligheidsregio Fryslan	Odido, KPN	Network, Telephony	2025-11	€1m
13-11-2025	Retail	Wibra	Simac	Network	2025-11	NOT DISCLOSED
18-11-2025	Education	Universiteit Utrecht	KPN	Infra	2026-04	NOT DISCLOSED
24-11-2025	Government (Water Boards)	Waternet	Sogeti, PQR	Infra, End User, Application	2025-11	€34m
01-12-2025	Government (Others)	Allemaal-Digitaal	Vooruit, SiSo	Hardware&Software, End User	2025-12	NOT DISCLOSED
01-12-2025	Transport	Havenbedrijf Rotterdam	Conclusion	Application	2025-12	€5m
03-12-2025	Government (ZBO)	Kadaster	Orange Business Services	Infra	2025-12	€8m
04-12-2025	Government (ZBO)	Zorginstituut Nederland	Info Support	Infra	2026-01	€3m
04-12-2025	Transport	NS Nederlandse Spoorwegen	TCS	Application	2025-12	€113m
09-12-2025	Government (Provinces)	Provincie Utrecht	KPN	Infra	2025-12	€3m
09-12-2025	Health Care	Afeer	Nexxt	Infra, End User	2026-01	€2m
09-12-2025	Government (Provinces)	Provincie Noord-Brabant	Sogeti	End User	2026-01	€2m
10-12-2025	Education	Firda	Axians	Network	2025-11	NOT DISCLOSED
11-12-2025	Transport	RET	Conclusion	Application	2026-01	€8m
15-12-2025	Government (Central)	Belastingdienst	BPSolutions	Infra	2025-12	€24m
16-12-2025	Food & Beverage Processing	Horizon Natuurvoeding	DNA Services	Infra, End User	2026-01	NOT DISCLOSED
16-12-2025	Government (Municipalities)	VNG	SopraSteria, BDO, M&I, Ernst & Young, PuraSec, Vodafone, KPMG, Awareways, Topicus, REQON, Fox-IT	Infra	2026-01	€50m
16-12-2025	Manufacturing	Eriks	Cognizant	Infra	2026-01	NOT DISCLOSED
17-12-2025	Transport	NS Nederlandse Spoorwegen	TCS	End User	2026-01	€140m

(continued from previous page)

Managed Services & Outsourcing — Outsourcing, SLA-based management contracts and Security Services (SOC).

PUBLICATION	INDUSTRY	CUSTOMER	PROVIDER(S)	SERVICES	START DATE	TCV
19-12-2025	Health Care	GGD BZO	SopraSteria	Application	2025-12	€1m
19-12-2025	Telecommunications	Glasdraad	BAM Telecom	Network	2026-01	NOT DISCLOSED
22-12-2025	Government (Others)	Regio Gooi en Vechtstreek	Digital Survival	Infra, End User	2026-01	€2m
22-12-2025	Information Technology & Services	ICT West-Brabant West	Openline Managed Services	Infra, End User, Network	2026-01	€9m
22-12-2025	Government (Provinces)	BIJ12	Interstellar	Infra, End User, Network	2026-01	<€16m
23-12-2025	Government (Municipalities)	Gemeente Lingewaard	Ilionx	Infra	2026-01	€3m
23-12-2025	Government (ZBO)	AFM Autoriteit Financiële Markten	Capgemini	Infra, End User, Network	2026-01	€40m
24-12-2025	Government (Municipalities)	Gemeente Hengelo	SLTN	Telephony	2025-09	€4m
24-12-2025	Government (Central)	Schadefonds Geweldsmisdrijven	Triopsys	Infra	2025-10	€1m
24-12-2025	Government (Municipalities)	Gemeente Utrecht	Triopsys	Application	2026-01	€3m

Assets & Licensing — Hardware delivery, standard software, and license management.

PUBLICATION	INDUSTRY	CUSTOMER	PROVIDER(S)	SERVICES	START DATE	TCV
03-10-2025	Education	Stichting Openbaar Onderwijs Groep Groningen	Dustin	Hardware&Software	2025-07	€9m
09-10-2025	Health Care	Erasmus MC	PQR	Hardware&Software	2025-10	€252m
10-10-2025	Education	MBO Utrecht	Bechtle	Hardware&Software	2025-08	€3m
22-10-2025	Government (ZBO)	CAK Centraal Administratiekantoor	Protinus, SoftwareOne	Hardware&Software	2025-11	NOT DISCLOSED
22-10-2025	Education	Xpect013	De Rolf Groep	Hardware&Software	2025-11	€2m
24-10-2025	Government (Central)	Ministerie van Defensie	Pro Warehouse	Hardware&Software	2025-08	€106m
24-10-2025	Government (Municipalities)	Gemeente vlaardingen	ARP	Hardware&Software	2025-11	€1m
05-11-2025	Transport	Prorail	Bechtle	Hardware&Software	2025-11	<€504m
06-11-2025	Government (Municipalities)	Bizob	ARP	Hardware&Software	2025-11	€31m
10-11-2025	Government (Water Boards)	Waterschap AA en Maas	Aces, Bechtle, Iterio	Hardware&Software	2025-09	€5m
10-11-2025	Information Technology & Services	SURF	Axians	Hardware&Software	2025-12	€135m
11-11-2025	Education	Atlas College	Dustin	Hardware&Software	2025-11	€2m
11-11-2025	Education	Wageningen UR	Dustin	Hardware&Software	2025-11	€1m
19-11-2025	Media	NOS Nederlandse Omroep Stichting	SLTN	Hardware&Software	2025-12	€1m
24-11-2025	Government (Central)	Belastingdienst	UiPath	Hardware&Software	2025-12	€2m
03-12-2025	Government (Central)	Ministerie van Infrastructuur en Waterstaat	SAP	Hardware&Software	2025-10	€17m
04-12-2025	Health Care	VGGM Veiligheid Gezondheid Gelderland Midden	ARP	Hardware&Software	2025-11	€10m
05-12-2025	Government (Municipalities)	De Liemers	De Rolf Groep	Hardware&Software	2026-01	€1m
07-12-2025	Health Care	Sportbedrijf Rotterdam	Bechtle	Hardware&Software	2026-01	€2m
08-12-2025	Government (Municipalities)	ICT NML	HET IT	Hardware&Software	2025-12	€32m
08-12-2025	Transport	Prorail	Bechtle	Hardware&Software	2025-10	€59m
17-12-2025	Government (Municipalities)	Gemeente Alkmaar	Insight	Hardware&Software	2025-12	€2m
18-12-2025	Government (Municipalities)	Gemeente Almere	Aces, ARP, Protinus, PQR	Hardware&Software	2026-02	€59m
18-12-2025	Government (Others)	Stroomopwaarts MVS	Aces, Acknowledge, ARP	Hardware&Software	2025-12	<€2m
19-12-2025	Government (Municipalities)	Gemeente de Fryske Marren	Protinus	Hardware&Software	2026-01	<€2m
22-12-2025	Oil & Energy	Enexis	Dustin	Hardware&Software	2026-01	€122m
26-12-2025	Oil & Energy	Gasunie	Conscia	Hardware&Software	2026-01	<€50m
26-12-2025	Government (Water Boards)	Waterschap Limburg	Aces	Hardware&Software	2026-01	<€7m