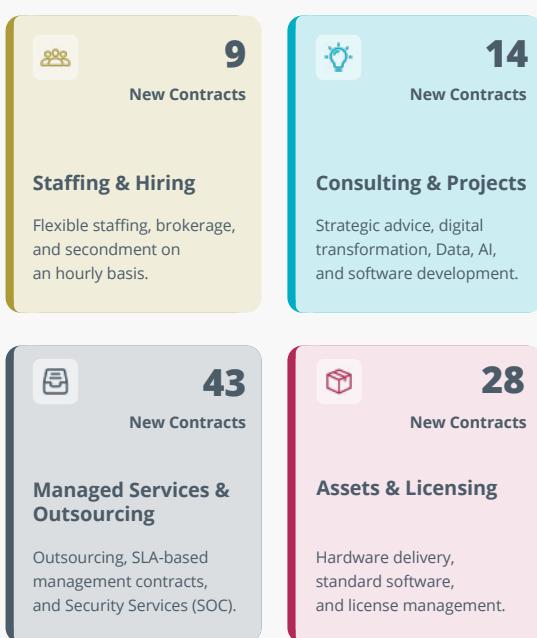


VPPipeline PULSE

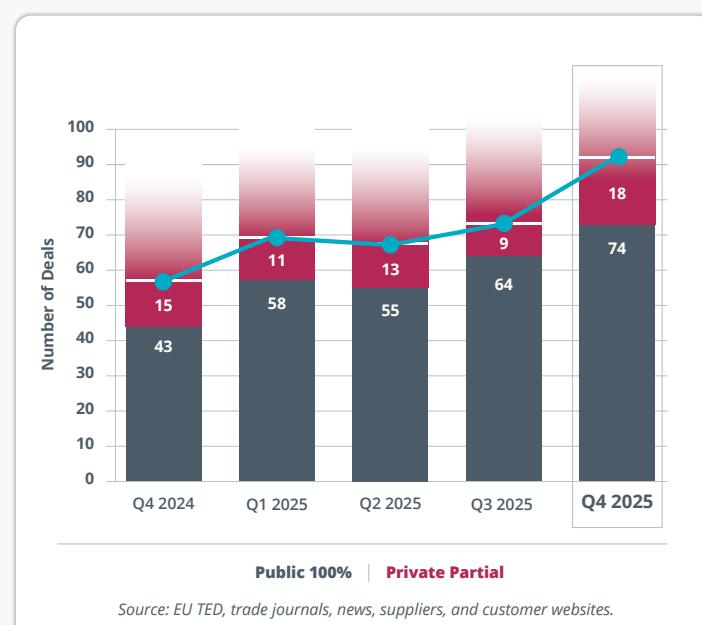
This Q4 2025 edition of the VPPipeline Market Pulse presents a market overview based on 94 newly identified transactions and a forecast of 458 expiring contracts emerging over the next 24 months. The current transaction landscape is headlined by major 'Staffing & Hiring' framework agreements, including 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



Transaction Volume Trends



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 →](#)