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IPD-Report 2025

Integrated Project Delivery (IPD) in Germany – Development and Characteristics of IPD Projects

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Preface

The efficient and rapid implementation of demanding construction projects is of crucial importance for overcoming the major challenges facing our society and for economic development in Germany. The structures built must satisfy the requirements of users, operators and other stakeholders, while at the same time carefully considering the impact on the environment and future generations.

Since 2018, a new project delivery model for the implementation of construction projects has been in use in Germany: Integrated Project Delivery (IPD). This approach has been tested internationally, with predominantly positive results reported. Initial experiences in Germany are also promising. IPD is based on the idea that challenging construction projects can only be successfully implemented through intensive collaboration between all relevant value-adding partners, i.e. the client, planning and construction companies, and through jointly pursued project objectives. This in turn requires a higher level of integration. The higher degree of integration is achieved through changed framework conditions in the areas of culture, organization, economy and processes. The project delivery model is further supported by agreed values among the project partners and, typically, a multi-party agreement with jointly defined goals, rules for collaboration and incentive mechanisms.

With the project database regarding German IPD projects established at Karlsruhe Institute for Technology (KIT) in 2021, we aim to create transparency regarding the development of IPD and the relevant characteristics of as many IPD projects as possible. I would therefore like to thank all project participants who have openly and willingly provided us with information about their projects for this purpose. Should you be unable to locate your IPD project in the report and wish to participate in this scientific project, I would be pleased to receive your correspondence.

This IPD-Report 2025 is the fourth in the series, and it provides an overview of completed, ongoing and planned IPD projects in Germany. Our primary focus is on the classification of the IPD phases over time, and we present the distribution of IPD projects based on selected characteristics. The information database will be expanded in a gradual manner over time, with a goal of reporting on additional IPD design features. I hope you find this report informative and enjoy reading it.

Prof. Dr. Shervin Haghsheno

Content

1 Objective und Methodology

Objective

Methodology

Objective of the IPD-Report
Using data from the IPD project database, the annual IPD-Report presents the current development of Integrated Project Delivery in Germany, thus providing an overview of the market. Each IPD project is unique, both in terms of project content and the specific framework conditions of Integrated Project Delivery. The aim is therefore to create transparency regarding selected project characteristics.

Subject Matter of the Study
This report summarises information on projects carried out with IPD. The decisive factor for the classification of a construction project as an IPD project is that the IPD characteristics according to the ‚IPA-Zentrum' (The Competence Center on IPD in Germany) are either (foreseeably) fulfilled or at least being pursued. Additionally, the partner selection phase must have started and the selection process of at least one of the IPD partners has been initiated.

Regional Scope
All IPD projects in Germany are included.

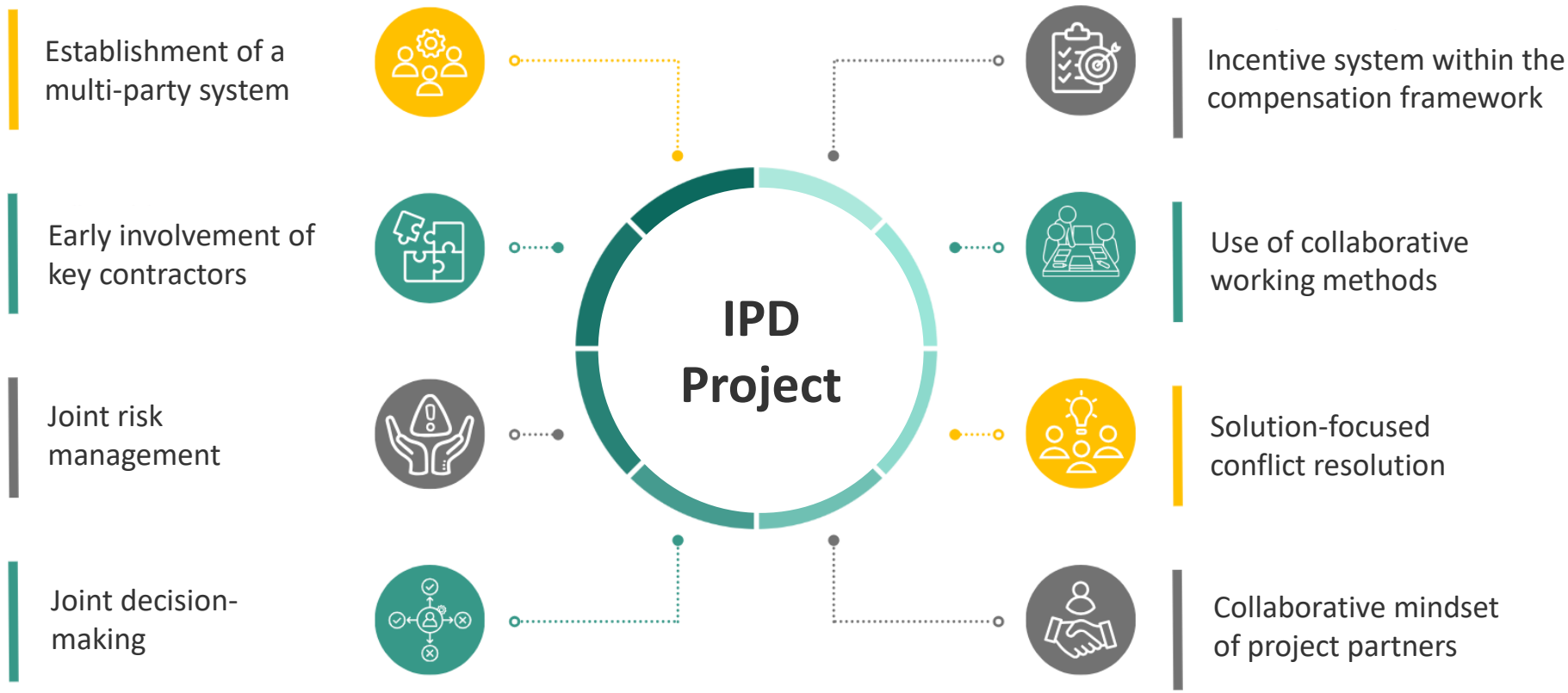
Time Scope
The database ranges back to 2018, when the first IPD projects began to be developed. All information available from that point in time until the end of June 2025 was used for this report.

Data Sources
The data collected is based on exchanges with client organizations, publications, presentations at public events, tender documents, market information events and project websites. In addition, our own surveys and discussions with market players, which were conducted as part of the scientific or advisory support for the projects, were also included.

Content

2.1 What is an IPD Project?

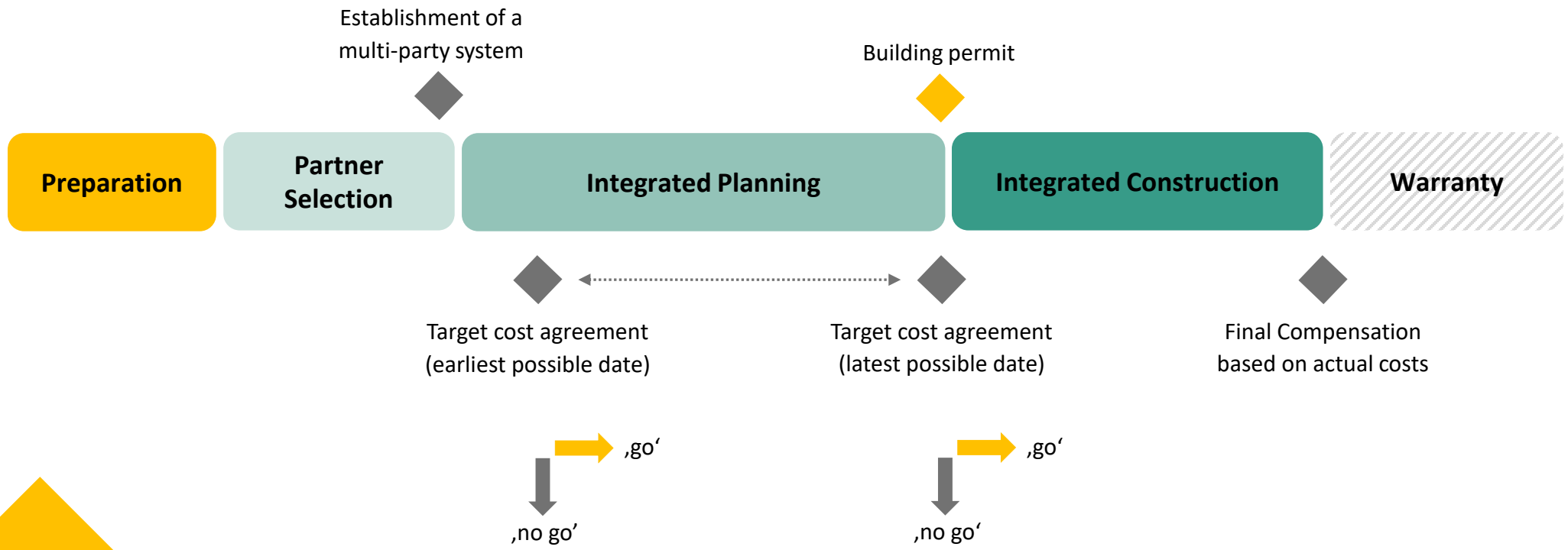
For a construction project to be classified as an IPD project, the eight characteristics and the associated model components must be cumulatively implemented in accordance with the definition of the ‚IPA-Zentrum'.[1] Further information can be found in the source indicated.



[1] *IPA-Zentrum (Ed.): Integrierte Projektabwicklung (IPA) - Charakteristika und konstitutive Modellbestandteile, 2022*

2.1 What is an IPD Project?

An IPD project is generally divided into four project phases, which are outlined below with relevant milestones.[1]

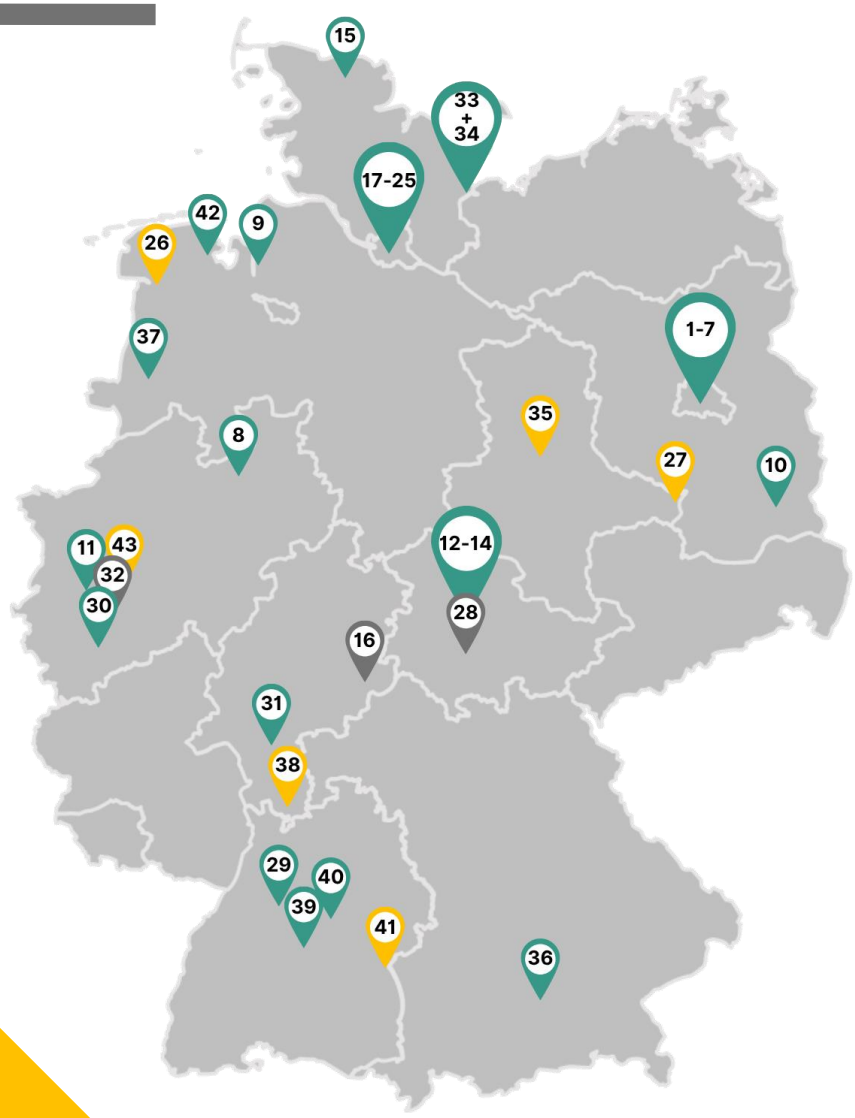


[1] *IPA-Zentrum – Source: www-ipa-zentrum.de*

2.2 Regional Distribution

Caption:

- Planned
- Ongoing
- Completed



New IPD projects in the IPD-Report 2025 are marked with a ★

No.	Project Name	Location
1	Havelufer Quartier	Berlin
2	BAM GBD 149	Berlin
3	Siemensstadt Square - Modul 1	Berlin
4	Bürogebäude an der Elisabeth-Abegg-Straße	Berlin
5	Luisenblock Ost	Berlin
6	in.grid	Berlin
7	DB - Siemensbahn	Berlin
8	Modernisierung Universität Bielefeld	Bielefeld
9	3 Schulen Bremerhaven	Bremerhaven
10	DB - Neues Werk Cottbus	Cottbus
11	Zentrallabor Universitätsklinikum Düsseldorf ★	Düsseldorf
12	DB - ICE City Erfurt: Haus 1	Erfurt
13	DB - ICE City Erfurt: Haus 2 ★	Erfurt
14	DB - ICE City Erfurt: DB Campus ★	Erfurt
15	Fördeklinikum Katharinen Hospital ★	Flensburg
16	Sensilo - JUMO Standorterweiterung Fulda-Rodges	Fulda
17	Sanierung Kattwykbrücke, Integrierte Projektallianz Kattwyk (iPAK5)	Hamburg
18	LIFE Hamburg	Hamburg
19	Reiherstiegschleuse	Hamburg
20	Salzgitterkai	Hamburg
21	DB - S-Bahn Linie S4 Hamburg	Hamburg
22	DB - Werk Elbgaustraße Hamburg	Hamburg
23	Campusentwicklung DOK an der Helmut-Schmidt-Universität Hamburg	Hamburg
24	Neugründung Stadtteilschule Osterbek und Erweiterung Gymnasium ★	Hamburg
25	Westumfahrung Alte Süderelbe (WASE)	Hamburg
26	Ersatz Schleuse Herbrum	Herbrum
27	Flugplatz Holzdorf - STH-Hallen und Flugbetriebsflächen ★	Holzdorf
28	Neubau ITZ Bund Ilmenau	Ilmenau
29	DB Residenzbahn	Karlsruhe - Stuttgart
30	DB - EÜen Zülpicher/Luxemburger Straße	Cologne
31	Neubau Paul-Ehrlich-Institut	Langen
32	Bayer Sol-1	Leverkusen
33	DB - Fehmarnbeltquerung, Schieneninfrastruktur	Lübeck
34	DB - Fehmarnbeltquerung, Absenktunnel	Lübeck
35	Neubau Campus Zentralklinikum Magdeburg	Magdeburg
36	DB - VE734 2. Stammstrecke	Munich
37	Amprion A-Nord	North Rhine-Westphalia / Lower Saxony
38	GeoLaB Forschungslabor Geothermie	Odenwald
39	DB PSU - Gäubahnausbau Nord	Stuttgart
40	Transformation Klett Areal ★	Stuttgart
41	Erweiterung und Sanierung Flachbau Bundeswehrkrankenhaus Ulm	Ulm
42	Marinearsenal Wilhelmshaven ★	Wilhelmshaven
43	L70 Kiesbergtunnel	Wuppertal

2.3 Completed and Ongoing IPD Projects

End of data collection

Project Name	Project Volume Category	2018		2019				2020				2021				2022				2023				2024				2025			
		Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Havelufer Quartier Berlin	€200M – €500M																														
Sanierung Kattwykbrücke (iPAK5)	€15M - €50M																														
Bayer Sol-1	€200M - €500M																														
3 Schulen Bremerhaven	€100M - €200M																														
LIFE Hamburg	€50M – €100M																														
DB - Neues Werk Cottbus	> €1B																														
Bürogebäude an der Elisabeth-Abegg-Straße	€100M – €200M																														
Siemensstadt Square - Modul 1	€100M – €200M																														
Amprion A-Nord	> €1B																														
BAM GBD 149	€200M - €500M																														
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Neubau ITZ Bund Ilmenau	€15M - €50M																														
in.grid Berlin	€200M - €500M																														
Transformation Klett-Areal	€50M – €100M																														
Neubau Paul-Ehrlich-Institut	€0,5B - €1B																														
DB PSU - Gäubahnausbau Nord	€0,5B - €1B																														
Luisenblock Ost I	€0,5B - €1B																														
DB - EÜen Zülpicher/Luxemburger Straße	€200M - €500M																														
HPA - Salzgitterkai	€100M – €200M																														
DB - Fehmarnbeltquerung: Schieneninfrastruktur	> €1B																														
DB - ICE City Erfurt: Haus 1	€50M – €100M																														
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DB - VE734 2. Stammstrecke	N/A																														
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Fördeklinikum Katharinen-Hospital	€200M - €500M																														
Zentrallabor Universitätsklinikum Düsseldorf	€200M - €500M																														

Caption:

- Preparation
- Partner Selection
- Integrated Planning
- Integrated Construction
- Operation

Sorted by start of the ‚Partner Selection' phase
Completed IPD projects marked by ◆

2.3 Completed and Ongoing IPD Projects

Number of projects
As of Q2/2025, a total of 43 IPD projects have been identified for which a decision in favor of IPD has been made. Of these, 34 projects in Germany can be classified as completed or ongoing IPD projects. We defined projects as "ongoing" IPD projects, if the *partner selection* phase of the project has been initiated. The pivotal element in this matter is the initiation of the selection process for at least one of the IPD partners.

Current status of projects
Of the 34 projects under consideration, five have been completed. A further eight projects are either completely or partly in the *Integrated Construction* phase. A total of ten projects are currently in the *integrated planning* phase. Eleven additional projects are currently in the *partner selection* phase.

Comparison to the previous year
In comparison with the IPD-Report 2024, it can be stated that the trend towards the use of IPD in construction projects in Germany is continuing steadily. In 2024, 25 completed or ongoing IPD projects were documented, whereas in 2025, 34 projects have initiated the *partner selection* phase. During the reporting period, three additional projects were completed. An increasing number of projects are now also capable of providing experience from the i*ntegrated planning* and i*ntegrated construction* phases.

Project volume
Based on the information available on project volumes and taking a very conservative approach, it can be concluded that since 2019 the project volume of the completed projects, the ongoing projects and the projects in the *preparation* phase, using the IPD model, adds up to at least €15 billion. The actual total project volume of the reported IPD projects is likely to be significantly higher.

2.4 IPD projects in the *Preparation* Phase

For the ongoing IPD projects described in the previous section, at least the *partner selection* phase has been initiated. There are also other projects in the *preparation* phase for which the client has already decided to implement them as IPD projects. No selection process has yet been started for these projects. We currently have nine such IPD projects on record.

It should be noted at this point that we are only listing projects for which we know for certain that the decision to use IPD has been made. In addition, there are a number of other projects for which IPD is being seriously considered as a potential project delivery model, but for which the final decision has not yet been made.

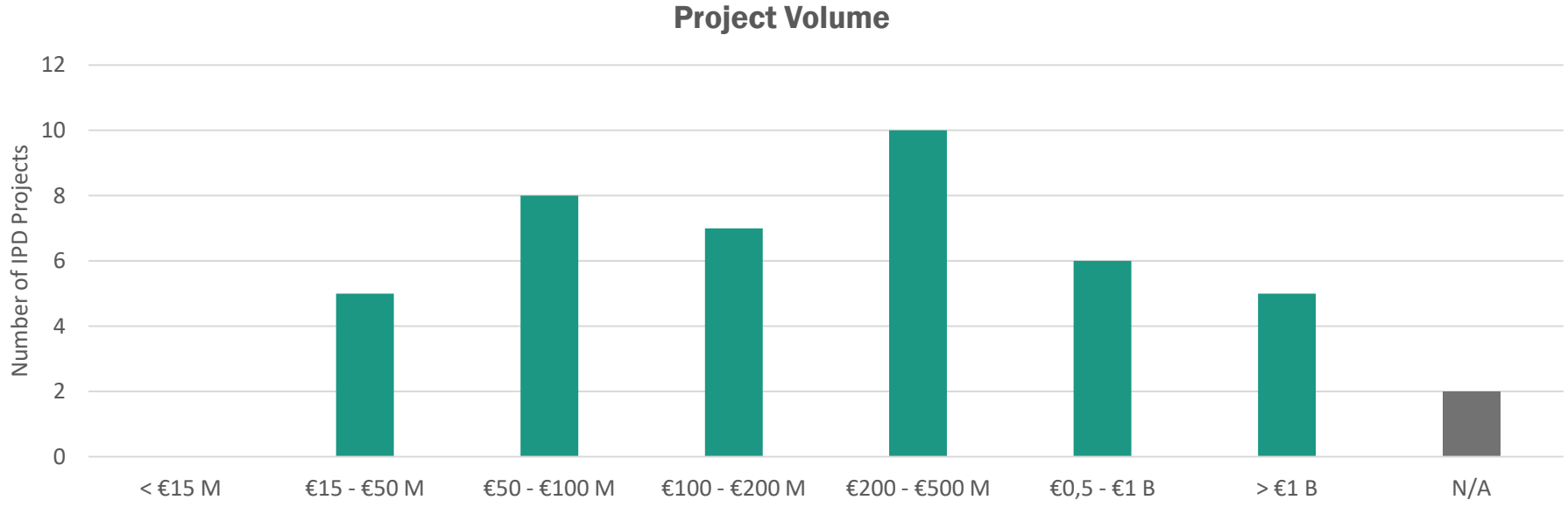
Project name	Project volume category
Ersatz Schleuse Herbrum	€100M - €200M
GeoLaB Forschungslabor Geothermie	€15M - €50M
Erweiterung und Sanierung Flachbau Bundeswehrkrankenhaus Ulm	€100M - €200M
L70 Kiesbergtunnel	N/A
DB – ICE City Erfurt: Haus 2	€50M - €100M
DB – ICE City Erfurt: DB Campus	€50M - €100M
Flugplatz Holzdorf - STH-Hallen und Flugbetriebsflächen	€200M - €500M
Neugründung Stadtteilschule Osterbek und Erweiterung Gymnasium	€50M - €100M
Neubau Campus Zentralklinikum Magdeburg	€0,5M - €1B

2.5 Distribution of IPD Projects

Project Volume

The figure shows the distribution of completed projects, ongoing projects and projects in the *preparation* phase according to their project volume. Project volume categories were created for this purpose, to which the projects were assigned.

The distribution of IPD projects according to project volume shows a wide spread. The smallest projects are in the €15 - €50 million category. There are currently five projects in this category. Six projects have been added to the €50 - €100 million category since the last report. The proportion of projects with a volume of less than €100 million has risen from around a quarter to almost a third compared with the last IPD-Report 2024. Around two-thirds of IPD projects have a project volume of more than €100 million.

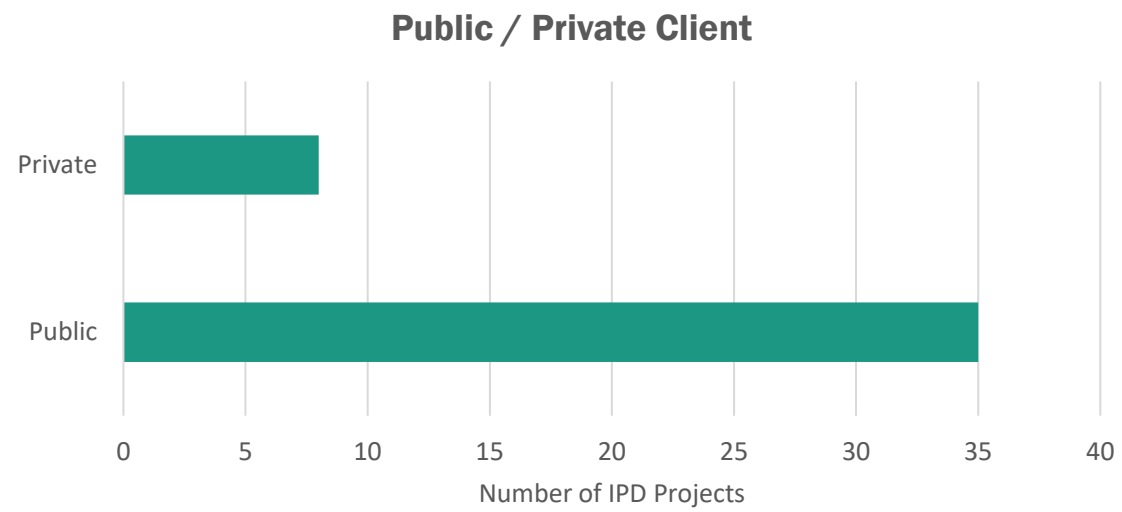


n = 43 IPD projects completed, ongoing or in preparation

2.5 Distribution of IPD Projects

Public / Private Client

The figure shows the distribution of IPD projects in terms of whether the client is public or private. 35 IPD projects are public sector projects and eight IPD projects are private sector projects.



n = 43 IPD projects completed, ongoing or in preparation

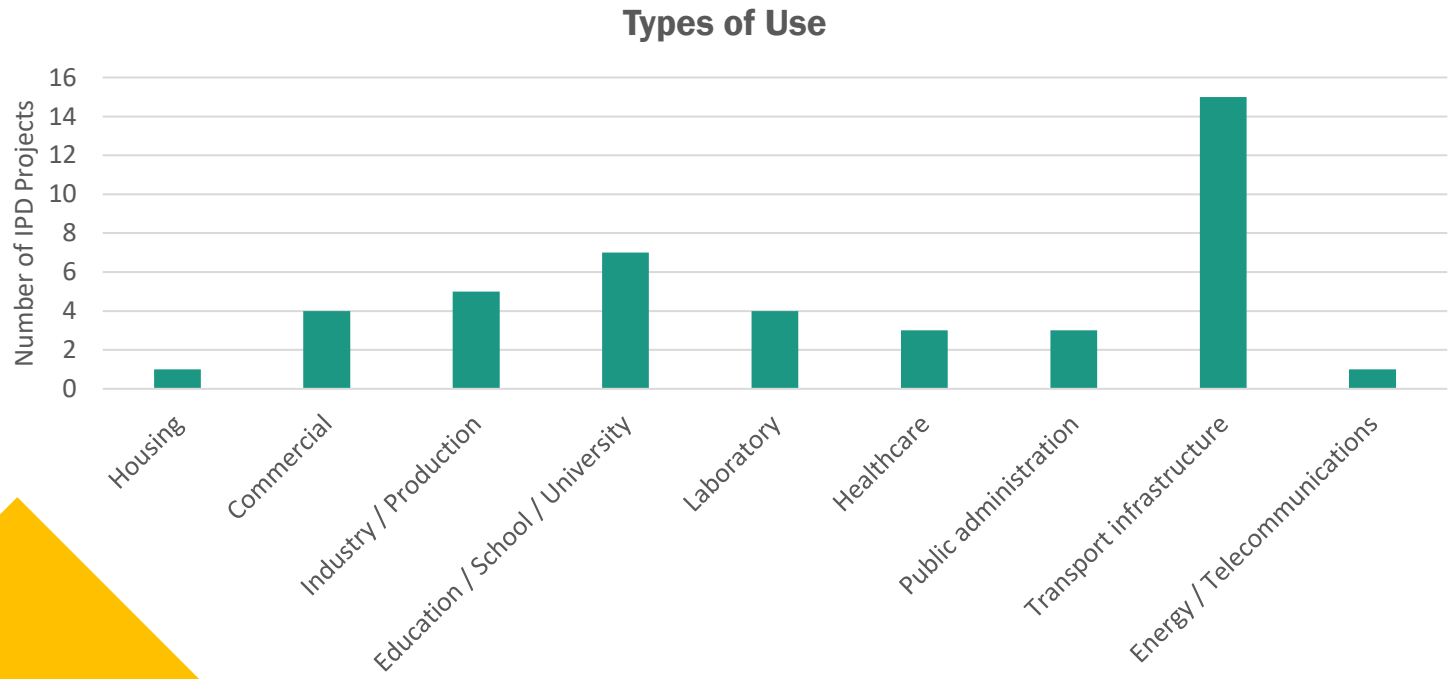
Compared to last year's report, the proportion of IPD projects by public clients has risen further. In fact, all newly added IPD projects are public construction projects. The German railway (`Deutsche Bahn`) is making a significant contribution to this trend with its increasing number of IPD projects. However, projects in public building construction are also continuing to reinforce this trend.

The relative restraint shown by private clients is an interesting finding. One reason for this could be the current economic stagnation, with private investors holding back on investment.

2.5 Distribution of IPD Projects

Types of Use

The figure shows the distribution of IPD projects by types of use. Categories were created that indicate the main use and the associated type of structure. No further differentiation was made in the ‘Transport infrastructure’ category, as larger projects often involve a combination of several types of structures. This category therefore includes construction projects in the field of various modes of transport, such as rail, road and waterways.



n = 43 IPD projects completed, ongoing or in preparation

The distribution shows that the IPD projects represent a wide range of uses. Projects from both building construction and civil engineering are represented.

The distribution shows that the category ‘Transport infrastructure’ is represented with 15 projects. This is due, among other things, to the large number of pilot projects carried out by the ‚German Railway‘. Compared to last year's report, IPD projects in the health category are recorded for the first time with three hospitals.

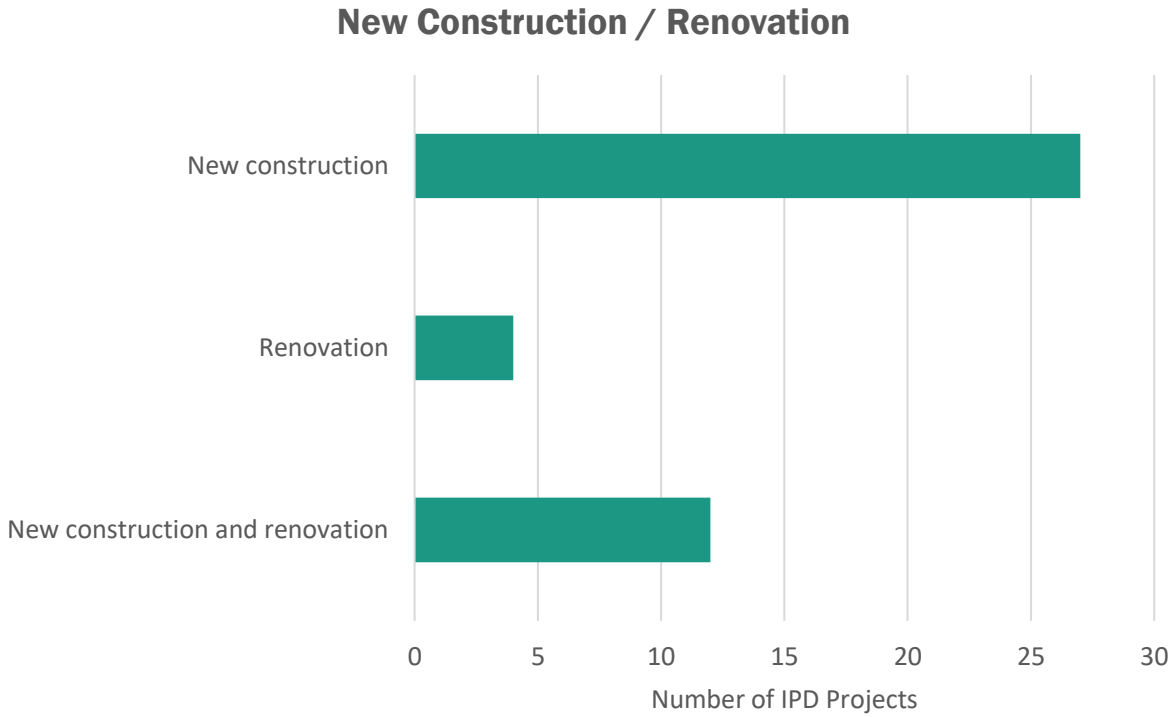
2.5 Distribution of IPD Projects

New Construction / Renovation

The figure shows the distribution of IPD projects in terms of whether they are new construction projects or renovation projects in terms of building within existing structures.

The distribution shows that the majority of IPD projects are new construction projects. Four IPD projects focus on the renovation of existing structures. A further twelve projects are a mixture of new construction and building renovations.

Compared to last year's report, there has been a noticeable increase in renovation projects and projects that are a mixture of new construction and renovation. It seems that, given the greater uncertainties and particular complexity of renovation projects, building contractors are increasingly recognizing the suitability of the IPD model.



n = 43 IPD projects completed, ongoing or in preparation

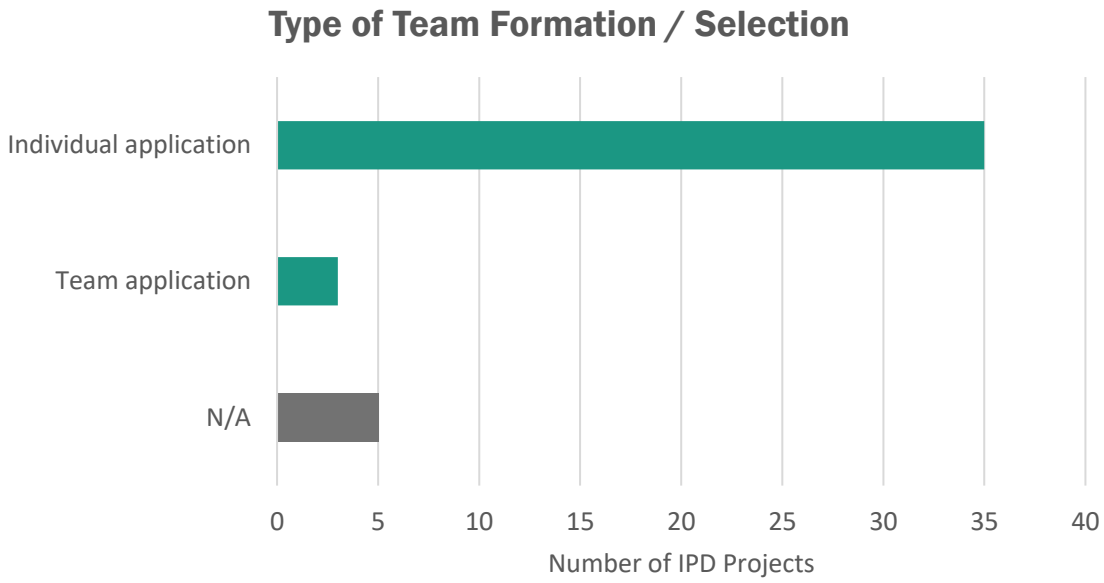
2.5 Distribution of IPD Projects

Type of Team Formation / Selection

Project participants in IPD projects can be selected through separate, competence-focused selection procedures (individual applications), or they can come together as a team in advance for the selection procedure (team applications). The figure below shows the distribution of team formation/selection types.

Most IPD projects in Germany continue to use individual applications. Only three IPD projects selected partners based on a team application.

No information is available for five projects because the decision on the type of application has not yet been made.



n = 43 IPD projects completed, ongoing or in preparation

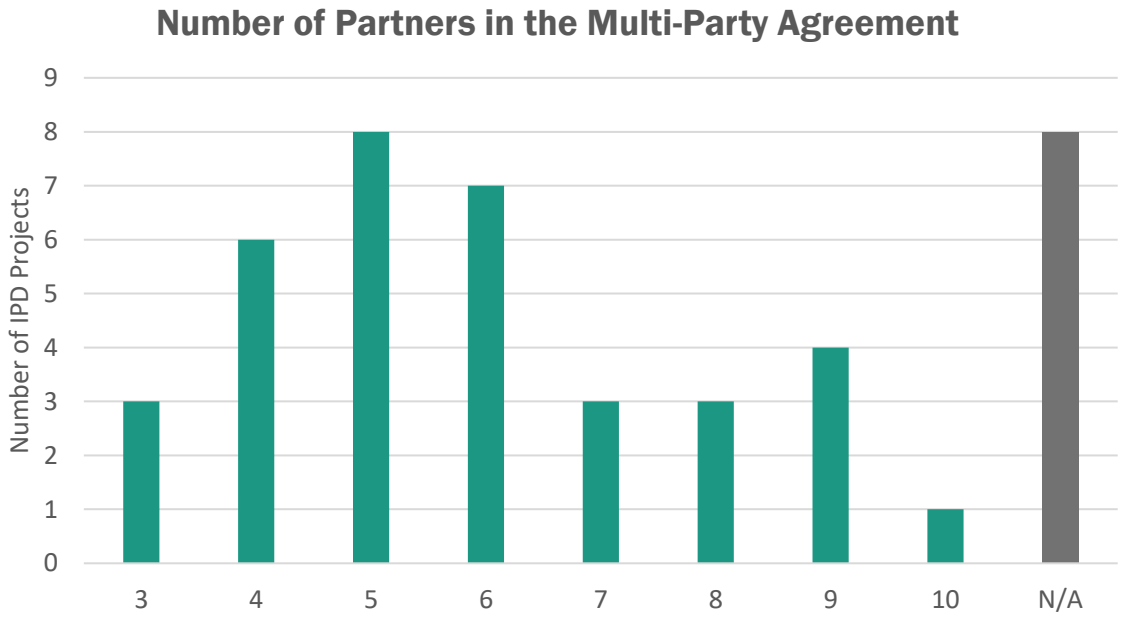
2.5 Distribution of IPD Projects

Number of Partners in the Multi-Party Agreement

The figure illustrates the distribution of IPD projects according to the number of contracting parties (partners) in multi-party agreement. For some projects, a decision has not yet been made, so no information is currently available.

The number of contractual partners in a multi-party agreement is determined on the one hand by the construction project and on the other by the market structure of potential constructors and planners. An additional consideration is the question of what team size can operate effectively within integrated organizational structures and decision-making in the committees without overwhelming those involved, who are mostly undergoing significant changes associated with IPD.

The distribution shows that the number of partners in multi-party agreements in the projects under review varies between three and ten. Around half of the projects have four to six partners in their multi-party agreements.



n = 43 IPD projects completed, ongoing or in preparation

Content

3.1 Conclusion

The present IPD-Report 2025 provides a well-founded overview of the current development of the use of Integrated Project Delivery (IPD) in the construction industry in Germany. It is important to note that the momentum that began four years ago in terms of the number of IPD projects started is continuing steadily. This indicates that an increasing number of market participants are acquiring practical experience with IPD, and subsequent experience can be evaluated in terms of the desired results. A total of 43 projects were identified in which the decision to use IPD had been made. Of these, five projects can be classified as ‚completed', 29 as ‚ongoing' and nine are in the *preparation* phase.

In addition to the ongoing and other projects in the *preparation* phase mentioned above, we can conclude from the information available that a number of other IPD projects are currently in the decision-making phase. The decision regarding the implementation of the IPD model, and the subsequent declaration of a project as ‚in preparation', is yet to be determined.

The report contains information on some distributions in regard to selected characteristics of IPD projects. With regard to the project volume, it should be noted that there is great variation, ranging from €15 million to more than €1 billion. It is interesting to see that although around two-thirds of projects have a project volume of more than €100 million, there has been an increase in IPD projects with a budget lower than €100 million in recent years. It should be noted that IPD projects can be identified in almost all types of use. This suggests that IPD has the potential to be a viable implementation option for various segments of the construction industry. This is also reflected in the increasing number of projects involving renovation or a combination of renovation and new construction. In these projects, the IPD model is an alternative to conventional execution models.

It was also found that, in addition to the familiar approach of individual applications, team applications are also used in some cases in the selection process for IPD partners. The evaluation of the number of contractual partners in multi-party agreements is also a subject of interest. This revealed a range of between three and ten contractual partners. It is imperative that the specific arrangements of IPD projects are always based on the specific requirements of the project circumstances and the respective market conditions.

3.2 Outlook

While the information and distributions presented in this report offer valuable insights into the development of Integrated Project Delivery in Germany, further information and in-depth analyses are necessary to evaluate specific practical experiences.

As part of the ‚IPD-Evaluation' research project conducted by our institute at KIT in collaboration with the University of Kassel (Prof. Dr. Peter Racky), selected ongoing and completed IPD projects in Germany are currently being comprehensively documented and evaluated. The research project was commissioned by the Federal Institute for Research on Building, Urban Affairs and Spatial Development (BBSR) at the Federal Office for Building and Regional Planning (BBR), in cooperation with the Federal Ministry for Housing, Urban Development and Construction (BMWSB).

The research project documents and evaluates approximately 20 selected IPD projects in Germany. The project framework data and the specific design of individual IPD elements are systematically recorded, and their effects on sub-processes and project objectives and goals are analysed. The findings will provide a solid foundation for practical recommendations, guidelines and sample documents. These will be used to design IPD projects and their respective IPD characteristics.

IPD-Report 2025

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available on www.lean-ipd.de