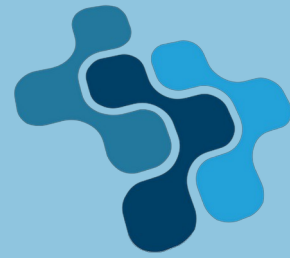


MSR-INNOVATIONS GMBH



Tender Analysis

Summary of the Application Conditions

Project Information

PROJECT	Sample Project — Institute Building
CLIENT	Sample Client GmbH, 1 Sample Street, 12345 Sample City
CONTRACTOR	MSR-Innovations GmbH
AUTHOR	Max Mustermann
DATE	01.01.2026
PROCEDURE	Competitive procedure with negotiation (EU, VgV)
WEIGHTING	0 % price / 100 % performance (award matrix, max. 500 points)
DEADLINE	01.02.2026, 12:00 (request to participate)
INITIAL BIDS	April 2026
PLANNING START	June 2026
COMPLETION	approx. 31.12.2031

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1 Note on this Sample Document

This document is an anonymised sample document. It shows the structure, outline and level of detail of a tender summary prepared by MSR-Innovations GmbH, based on a fictitious procurement procedure.

This document was prepared for MSR-Innovations GmbH. Customer-specific documents are used or prepared for each company.

All project, company, personal and location details, all dates and the project-related cost and fee figures have been replaced by sample data. The tender requirements and the evaluation methodology are reproduced unchanged, as they show the working method.

2 Application Criteria (Suitability, Forms of Annex 02)

Ten forms are to be submitted with the request to participate.

Form	Content	Minimum requirement
01	Exclusion grounds under §§ 123/124 GWB	None may apply
02	Economic and financial standing	Average annual turnover (net, KG 480, last 3 years) $\geq$ €90,000; commercial register entry; professional liability insurance $\geq$ €3 million for personal injury and €1 million for material damage and financial loss (twice the sum insured per year, i.e. annual aggregate maximum); proof only upon request
03	Technical and professional ability	Average staff numbers over the last 3 years $\geq$ 3 FTE (full-time equivalents; permanently employed, including owners and management)
04	Technical ability	Declaration on technical equipment
05	Suitability to pursue the professional activity (reference projects)	Mandatory as Excel file (Annex 03), no conversion to PDF
06	Interests and shareholdings	Declaration of independence
07	Groups of economic operators (candidates and tenderers)	Where applicable GbR or oHG, joint and several liability
08	Reliance on the capacities of other entities (Eignungsleihe)	Separately for each entity whose capacities are relied on
09	Subcontractors	Separately for each subcontractor
10	Russia-free supply chain	Self-declaration pursuant to EU Regulation 2022/576

Table 1: Forms of the request to participate and their minimum requirements.

In addition, proof is required that the designated staff are architects or engineers in accordance with § 75 VgV.

3 Reference Criteria (Annex 03, Suitability Matrix)

3.1 Reference 01 – Building Automation (Mandatory, otherwise Exclusion)

- Comparable project, for example an institute building, plant group 8, at least fee zone III
- At least three service phases from 2, 3 and 5–9 (including at least LPH 3, 5 and 8)
- Construction costs KG 480 of at least €300,000 net
- Completion of LPH 8 (acceptance and final invoice) within the last eight years before the participation deadline

3.2 Reference 02 (Optional)

The same minimum requirements apply as for Reference 01, but optional and for a different project than Reference 01. The reference enters the ranking with 50 % of the weighting of Reference 01.

3.3 Reference 03 – Public Procurement Law (Mandatory, Minimum Requirement Only)

Evidence is required of construction services in service phases 6 and 7 that were tendered under public procurement law (VOB/A) and commissioned by the client. The evidence may also be provided cumulatively across References 01 and 02. No points are awarded for this reference.

4 Chargeable Costs and Fee (Annex 04)

Parameter	Sample value
Contractual basis	HOAI 2021, §§ 55/56, fee zone III, base rate
Chargeable costs (provisional, KG 480)	€900,000.00
Basic fee at 100 % service profile	€180,000.00
Commissioned scope of services (90.2 %, LPH 2, 3, 5–9)	€162,400.00
Refurbishment surcharge (20 %)	€32,500.00
Additional effort for “Gebäudetyp E” (1 %)	€1,600.00
Special services	€12,000.00
Ancillary costs (5 %)	€9,800.00
Total fee (net)	€218,300.00
Hourly rate of the contractor	€120.00/h
Hourly rate of technical processing staff	€85.00/h
Hourly rate of commercial and technical staff	€65.00/h

Table 2: Chargeable costs and fee parameters (sample values).

According to Annex 01, these parameters are a fixed price for all tenderers. No fee offer is evaluated; only the concept in accordance with the award matrix (Annex 05) is evaluated.

5 Dates

Milestone	Date (sample)
Deadline for candidate questions	15.01.2026, 23:59
Participation deadline (submission of the request to participate)	01.02.2026, 12:00
Submission of binding initial bids	April 2026
Contract award and start of planning	June 2026
Kick-off	Maximum of 14 days after contract award
Completion of LPH 3 and submission of HU-Bau	July 2027
Approval period until	End of December 2027
Start of construction (advance measures)	April 2026
Handover to the user	December 2030
Project completion including final accounting	approx. 31.12.2031

Table 3: Schedule of the award procedure and project execution (sample data).

6 Award Procedure

- Competitive procedure with negotiation (EU-wide, VgV), electronically via a procurement platform
- Sequence: call for competition with requests to participate, followed by negotiation with initial bids and, where applicable, negotiation meetings and, where applicable, final bids
- Award criteria: 0 % price and 100 % performance, as the fee is a fixed price (see Chapter 4)
- Evaluation via the award matrix (Annex 05): maximum 500 points in four main criteria — qualification and experience of the staff (40 %), approach to project execution (35 %), costs and schedule (10 %), capacity planning (15 %)
- Attendance at the negotiation meetings is mandatory
- BIM project (Open BIM, IFC), collaboration via a CDE platform

7 Required Documents (Checklist)

- Request to participate with forms 01 to 10 (see Chapter 2)
- Annex 03 (suitability matrix) mandatory in Excel format
- In the case of a group of economic operators: additional signatures of the non-lead members (forms 07 to 10)
- In the case of reliance on the capacities of other entities or subcontractors: a separate signed form 08 or 09 respectively
- Registration on the eVergabe platform (free of charge)
- Maximum file size 50 MB per file

8 Conclusion for Our Own Application

Before submission, the following should be checked in particular: the average annual turnover (at least €90,000), the average staff numbers (at least 3 FTE), the cover amounts of the professional liability insurance and — most importantly — whether at least one reference project exists with fee zone III or higher, service phases 3, 5 and 8, construction costs KG 480 of at least €300,000 and completion within the last eight years.