



an agency of the  
Department of Arts and Culture

## TERMS OF REFERENCE

### REQUEST FOR QUOTATIONS TO DEVELOP A CONSERVATION MANAGEMENT PLAN FOR “BLACKIE”, A SPECIFICALLY DECLARED STEAM RAILWAY LOCOMOTIVE

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#### 1. PURPOSE

The South African Heritage Resources Agency (SAHRA) hereby invites suitably qualified and experienced service providers to submit proposals to develop a Conservation Management Plan (CMP) for %Blackie+ a steam locomotive, built in England in 1859, the first railway locomotive to run in South Africa. %Blackie+ was previously mounted on a plinth on the concourse of Cape Town railway station but was removed prior to the 2010 FIFA Soccer World cup renovations of the station, and was put in storage in Firgrove. PRASA's intention is to display its locomotive in a glass enclosure on Station Square in front of Cape Town Station, facing Adderley Street.

#### 2. BACKGROUND

SAHRA is a statutory organisation established in terms of the National Heritage Resources Act (NHRA), No 25 of 1999. The primary mandate of SAHRA is to identify, manage, protect, preserve and conserve heritage resources that have national significance. These heritage resources include but are not limited to Heritage Objects or Collections as stipulated in (s32) of the NHRA. One of the requirements for declaring heritage objects is to develop a Conservation Management Plan (CMP) which is a guiding document according to which the Specifically Declared Heritage Object must be conserved for future generations. %Blackie+ was first restored for display on Cape Town station in 1913 and apart from a period between 1927 - 1936 when it was on display at the Salt River Railway workshop, it remained on display in Cape Town until 2010. %Blackie+ was declared in terms of the National Monuments Act of 1969 (NMC) and at that time a CMP was not a requirement. In terms of the

NHRA, all previously declared monuments and cultural treasures are automatically specifically declared. The NHRA requires the development of a CMP as the mandate clearly stipulates that heritage resources are to be preserved and conserved for present and future generations. %Blackie+is owned by Passenger Rail Agency of South Africa (PRASA).

### **3. GUIDANCE**

Given the historic nature of %Blackie+as the first railway locomotive in South Africa, it is critical that the CMP addresses its conservation to ensure that it will stand up to the rigours of display as proposed.

3.1 The appointed service provider preparing the CMP should consider the current condition of the locomotive and provide guidance on the following:

- (i) whether any repairs are required
- (ii) whether any reinforcement of weakened areas is required
- (iii) whether painting is required and if so, the paint specification and (as far as practically possible to ascertain) the historically correct livery to be applied.
- (iv) whether any protective surface coatings are required to minimise possible future corrosion, and
- (v) whether any hazardous materials require removal and disposal (such as asbestos based boiler insulation lagging material). Any investigative work done in this regard must be non destructive (i.e. any movement of boiler cladding to expose the insulation lagging must be kept to a minimum).

3.2. The service provider preparing the CMP must consider the proposed display conditions and provide guidance on the following:

- (i) Consideration of the effects of sunlight and possible fading of the paintwork over time and whether the display location should be provided with shade.
- (ii) Consideration of humidity inside the display enclosure and the provision of suitable natural ventilation to minimise corrosion
- (iii) Consideration of access to the display enclosure for the purposes of regular monitoring and cleaning as appropriate of the locomotive and interior glass surfaces, as well as for any maintenance required.

- (iv) Provide recommendations on specifications for the glass enclosure and illumination of the locomotive during the hours of darkness.
- (v) Consideration of appropriate security for the locomotive
- (vi) Any conservation proposed must be according to ethical standards and wherever possible, any treatments should be reversible. Records should be kept so that it would be evident in future as to what work has been undertaken.

#### **4. SCOPE AND GOODS REQUIRED**

##### **The suitable service provider must:**

- Have heavy mechanical engineering experience (specific experience of railway locomotive and boiler engineering would be an advantage).
- Ability to identify asbestos material (in boiler lagging), this should not require analysis; a suitably qualified engineer with boiler experience will be able to make such a judgment.
- Have broad knowledge and understanding of railway heritage and especially the historic and delicate nature of an asset such as %Blackie+.
- Have architectural experience, specifically in the design considerations for a display enclosure of the type envisaged.
- Have in the past developed or assisted in the management and or conservation management plans for engineering equipment
- The appointed service provider must work closely with Passenger Rail Agency of South Africa (PRASA) and Transnet regarding any conservation work to be carried out on %Blackie+ as well as siting and other considerations at the chosen display location.
- The appointed service provider would be required to compile the CMP in three key phases each of which will require discussions and agreement with the owners of the locomotive viz:
  - I. Assessment of condition and discussion of recommendations for any conservation work
  - II. Discussion of recommendations concerning the current planned location identified where %Blackie+ would be displayed as well as specifications for the enclosure to provide both suitable protection and appropriate visual considerations (lines of sight, accessibility, and night-time illumination).

Final agreed design concepts and outline specifications to be included in the CMP

III. Provision of guidance on the future management and care of %Blackie+

## 5. Scope of Work

The appointed service provider will undertake the following work elements and include the findings and recommendations in the CMP:

- Visit the Firgrove storage location of %Blackie+ and make an assessment of the condition of the locomotive with respect to:
  - (i) Any visible damage;
  - (ii) Any repairs needed to correct visible damage or for the structural stability of the locomotive (eg: obviously loose or missing components);
  - (iii) Condition of paintwork;
  - (iv) Corrosion of the locomotive, both external and where accessible, internal surfaces (eg: inside surfaces of main frames);
  - (v) Condition of boiler lagging (if present). If lagging is present, the service provider must give an opinion on the presence of asbestos. If present, recommend any legal requirements and allowable remedial measures such as whether removal is required or whether sealing any exposed cladding seams in situ to render safe would be acceptable.
  
- Recommend any remedial conservation work required to be undertaken on %Blackie+ to make the locomotive suitable for display.
  
- Recommend safe transport procedures for %Blackie+ from Firgrove to its proposed display location and its installation in the new enclosure.
  
- Recommend the specifications for the display enclosure including type of glass, type of supports (to minimize visual interference), maintenance access and lighting. The type of track on which the locomotive is to be displayed should be specified (e.g. rails set in a plinth or ballasted . note that the track gauge is 1435 mm not the current 1067 mm). Simple protective railings and or bollards to

prevent vehicles or people getting too close to the enclosure are likely to be required and should be specified.

- Recommendations for the roof of the enclosure to ensure adequate drainage but also whether some element of shade is to be provided.
- Recommend any security measures for the enclosure.
- Recommendations for the future maintenance and conservation of the locomotive including cleaning cycles for both locomotive and enclosure.

## 5. REQUIREMENTS FOR FORMATS

A Conservation Management Plan (CMP) is valid for five (5) years after which it has to be reviewed. A consultant or service provider is therefore advised to take this matter into consideration when developing the CMP.

SAHRA requirements for acceptance of the CMP include the following:

- ✓ A comprehensive statement of significance of the locomotive
- ✓ Provision of a physical description of %Blackie+including colour images
- ✓ Provision of GPS coordinates of the envisaged location of %Blackie+ at Cape Town Station.
- ✓ Clear time-frames of tasks to be performed during the assessment and implementation of the CMP by the responsible officials or the owner. A monitoring process, clearly stating who does what, when and how. Time frames should be very clear with the activities to be done by responsible officials.
- ✓ Since %Blackie+is to be located in a public space, what measures would have to be undertaken to see that there will not be any negative impact on the locomotive with identification of any risk factors.
- ✓ Reasonable access by the public with good photographic and visual site lines.
- ✓ Frequency of recommended SAHRA inspections and clear statement of SAHRA process. The CMP should contain guidelines on protection from the elements as the locomotive will be displayed outside.

6. **PRODUCTION DELIVERY OF THE SPECIFICATIONS INCLUDES THE FOLLOWING:**

- Brief Report on the condition assessment
- Brief Report on the design / specification discussions decisions for display;
- Two hard copies of the Conservation Management Plan Documents that are inclusive of all the requirements stated above.
- User friendly manuals of the CMP for staff that will be responsible for looking after the locomotive for monitoring purposes.
- Monitoring guide for SAHRA.

7. **TERMS AND CONDITIONS OF PROPOSALS**

- 7.1 All costs and expenses incurred by potential service providers relating to their project proposal shall be borne by each respective contender. SAHRA is not liable to pay such costs, expenses, or to reimburse service providers in the process under any circumstances, including the rejection of any proposal or the cancellation of this project.
- 7.2 While SAHRA endeavors to ensure that all the information provided to all potential service providers is accurate, it makes no warranty as to the accuracy or completeness of any information provided.
- 7.3 SAHRA reserves the right to waive deficiencies in project proposals. The decision as to whether a deficiency may be waived or may require the rejection of a project proposal may be solely within the discretion of SAHRA.
- 7.4 SAHRA reserves the right to request new or additional information regarding each service provider and any individual or other persons associated with its project proposal.
- 7.5 SAHRA reserves the right not to make any appointment from the proposals submitted.
- 7.6 Service providers shall not make available or disclose details pertaining to their project proposal with anyone not specifically involved, unless authorized to do so by SAHRA.

- 7.7 Service providers shall not issue any press release or other public announcement pertaining to details of their project proposal without the prior written approval of SAHRA.
- 7.8 Service providers are required to declare any conflict of interest they may have in the transaction for which the tender is submitted or any potential conflict of interest. SAHRA reserves the right not to consider further any proposal where such a conflict of interest exists or where such potential conflict of interest may arise.
- 7.9 A **valid original Tax Clearance Certificate**, issued by the South African Revenue Services, must be submitted, failing, which the relevant service providers proposal shall not be considered. (See attached application form for Tax Clearance Certificate)
- 7.10 Any and all project proposals shall become the property of SAHRA and shall not be returned.
- 7.11 The proposals should be valid and open for acceptance by SAHRA for a period of 30 days from the date of submission.
- 7.12 Service providers are advised that submission of a project proposal gives rise to no contractual obligations on the part of SAHRA.
- 7.13 SAHRA reserves the right not to accept any proposal which does not comply with the TERMS OF REFERENCE and conditions set out in the proposal documents.
- 7.14 SAHRA reserves the right not to award the proposal to the service provider that scores the highest points.
- 7.15 Disputes that may arise between SAHRA and a service provider must be settled by means of mutual consultation, mediation (with or without legal representation) or, when unsuccessful, in a South African court of law.
- 7.16 All returnable proposal documents must be completed in full and submitted together with the service providers proposal.

- 7.17 The Requirements for content of the project proposal+ section above outlines the information that must be included in proposal offers. Failure to provide all or part of the information may result in your proposal being excluded from the evaluation process.
- 7.18 All goods/services or products to be supplied to SAHRA shall be in full compliance with South African approved standards and in compliance to the specifications provided.
- 7.19 It is the conditions of this Request for Quotation (RFQ) that, a quotation is submitted together with the following completed forms;
- a. Standard Bidding Document ( SBD) 6.1 Preference points claim form (valid BBBEE certificate must be submitted together with this completed document)
  - b. SBD 4 Declaration of Interests form
  - c. SBD 2 Tax Clearance certificate application form
  - d. SBD 8 Declaration of Bidders' Past Supply Chain Management Practices.
  - e. SBD 9 Certificate of Independent Bid Determination

**NB: Failure to submit completed returnable forms as mentioned above may automatically disqualify your quotation. Please ensure that you submit an original valid tax clearance certificate.**

## **8. EVALUATION CRITERIA**

- 8.1 All proposal offers received shall be evaluated based on the following phase out approach:
- Phase one: Compliance to the terms of reference and conditions of the proposal. Failure to meet any of the conditions of the proposal may automatically disqualify your proposal on this phase.
  - Phase two: Submission of the samples with as stated in no. 4 of the terms of reference.
  - Phase three: preference points for Broad-Based Black Economic Empowerment (BBBEE) Status Level of Contribution (80/20 preference points system), where 80 points are allocated to price, and 20 points are allocated to BBBEE status level as follows;



<b>B-BBEE Status Level of Contributor</b>	<b>Number of points (80/20 system)</b>
1	20
2	18
3	16
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

## **8.2 Price (Vat included)**

80 Points for price will be awarded with reference to the total fixed proposal amount inclusive of VAT. The service provider with the lowest price shall score the maximum 80 points.

## **9. SUBMISSION OF PROPOSALS**

Project proposals must be submitted in a sealed envelope, marked as confidential and for the attention of the contact person. It must be posted to the following address: South African Heritage Resources Agency, 111 Harrington Street, Cape Town, 8000, or placed in the tender box at the SAHRA Head Office, of the same address. We will accept emailed and faxed copies on the condition that the originals are provided when required.

**10. Closing date for proposal offers and proposals:** Proposals and quotations must be submitted in hard-copy on 21 July 2014 at 11:00. No late quotes shall be accepted.

**Contact Person regarding these terms of reference:**

Miss Mandisa Tantsi- SCM Officer

South African Heritage Resources Agency

111 Harrington Street, Cape Town, 8000

Tel: 021-462 4502

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