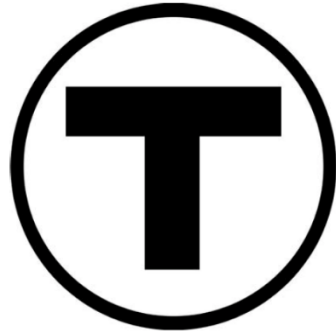




**Massachusetts Bay
Transportation Authority**

Elevator & Escalator Maintenance Services Contract

Ray Wise, Chief Procurement Officer

July 16, 2026

Elevator & Escalator Maintenance Services Contract

- Requesting approval for a 5-year contract (with up to 2 additional option years) for Elevator & Escalator Maintenance and Related Services
- The contract was competitively procured under MGL Chapter 30 Section 39M (Contracts for Construction and Material) and will be with a new vendor partner



Significant Contract Improvements

Requirements are more robust

- Increased reporting
- New KPI's:
 - Unit uptime/availability
 - Timely & accurate monthly reporting
 - Maintenance completion rate
- Stronger KPIs/penalties for:
 - Repeat callbacks
 - Response times
 - Staffing shortfalls

“Same Service” Costs Decrease

- Immediate decrease of 2.9% for annual maintenance compared to current
- 16 additional commuter rail units added

Operational Improvements

- 8.2% annual increase provides:
 - Annual cleandowns vs. once per contract term
 - Data integration of preventive maintenance activities
 - Real-time run status (one-time hardware fee of \$819K)

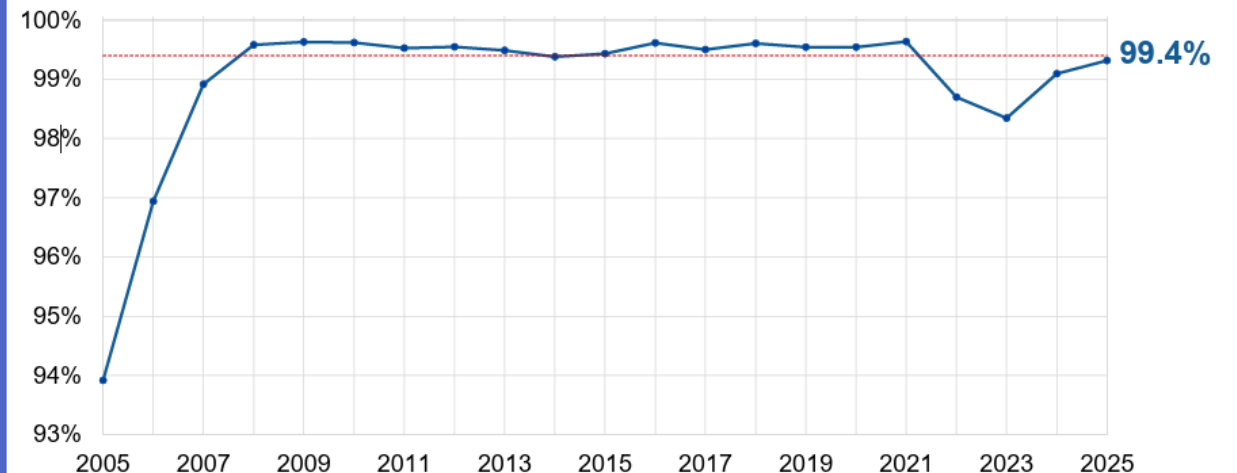


Overview of MBTA Elevators and Escalators

- 413 active units
 - 172 Escalators
 - 241 Elevators
- Maintenance agreement includes 25 full-time, dedicated mechanics, all maintenance parts, and 24x7 support
- Daniels-Finegold & Next Generation Accessibility Agreements
 - 99.4% elevator uptime requirement



Elevator Reliability (FY 2005-2025)



Elevator & Escalator Maintenance Procurement Process

Month	Activity
2025 & 2026	Numerous internal stakeholder meetings to update our specification. Changes include: • Support for 16 additional commuter rail units • Cleandown frequency now annual rather than once per contract term • Robust KPIs, data integration, and real-time run status • Transparent and consistent pricing for additional services • Clear escalation approach tied to IUEC Local 4 wages & Producer Price Index
April 2026	Request for Proposal (RFP #21-26) posted on COMMBUYS (April 8, 2026) • Bid under MGL Chapter 30, Section 39M (Contracts for Construction and Material) and awarded to the lowest responsive and responsible bidder • Direct email communication with 5 major Boston-area companies • Pre-Bid conference and site visit conducted with 2 proposers attending
May 2026	Bid period closed May 6, 2026 • 2 bids received: Kone, Inc. (incumbent) and Schindler Elevator Corp. • Schindler is the lowest responsive and responsible bidder

Cost & Services Comparison to Current Agreement

Annual Costs	Current Contract	Bid	% Change
Annual Preventive Maintenance Fee	\$ 11,808,156	\$ 11,644,667	
Additional 2 nd Shift Mechanic	\$ 618,000	\$ 416,023	
Total Costs – current services	\$12,426,156	\$12,060,690	(2.9%)
Annual Cleandown Fee	EXCLUDED	\$ 1,158,625	-
Trapeze Data Integration	EXCLUDED	\$ 17,120	-
Real-time unit run status	EXCLUDED	\$223,020	-
Total Annual Cost	\$12,426,156	\$13,459,455	8.2%

One-Time Costs	Bid
Elevator real-time run status Equipment	\$ 371,140
Escalator real-time run status Equipment	\$ 447,888
Total One-Time Cost	\$819,028

NOTES

- *Future year escalation will be calculated based 80% on the union wage and 20% on the Producer Price Index (PPI) for Elevators & Moving Stairways*
- *Additional services including construction support & refurbishments are permitted*
- *Contract also includes two, 1-year option periods; however, approval of these is not requested now*
- *Schindler has a detailed transition plan & intends to retain interested current employees*

Prior to annual escalations, the total contract value for the 5-year contract period is approximately \$68.1 million

Request of the MBTA Board of Directors

To authorize the General Manager of the Massachusetts Bay Transportation Authority, or his designee, to award and execute contract #21-26 Vertical Transportation Maintenance to Schindler Elevator Corporation to perform the maintenance and repair services described in RFP# 21-26 from September 1, 2026 to August 31, 2031, and to take all actions necessary or advisable to effectuate the Agreement, in a form approved by the General Counsel, in an amount not to exceed \$68,116,302.70, excluding annual price escalations allowed by contract, and excluding allowable additional services.

