

REQUEST FOR PROPOSALS (RFP)

RFP REFERENCE NUMBER	C-BRTA/HO/0092	
PROJECT NAME/ DESCRIPTION OF GOODS, WORK OR SERVICES	REQUEST FOR PROPOSAL (RFP) PROCESS TO INVITE SUITABLY QUALIFIED SERVICE PROVIDERS TO SUBMIT PROPOSALS FOR THE ACQUISITION, AND IMPLEMENTATION OF A WHATSAPP CHATBOT SOLUTION.	
BRIEFING SESSION DETAILS	A non-compulsory (please tick or cross the applicable session)	05 February 2026 Time 10:00am
	Microsoft Teams meeting Join: https://teams.microsoft.com/meet/34637942487334?p=B5SPtLrhfACxnMKfH6 Meeting ID: 346 379 424 873 34 Passcode: t4rh6yv7	
RFP CLOSING DETAILS	Date: 11 February 2026. Time: 11:00am RFP must be submitted to Email: Quotation6@cbrta.co.za	
RFP VALIDITY PERIOD	60 Working days (Commencing from the official closing date)	
ENQUIRIES	Benjamin.Shabangu@cbrta.co.za	

DIRECTIVE TO BIDDERS ON COMPLETION OF STANDARD BIDDING DOCUMENT FORMS OF BID PROPOSAL

1. The purpose of this document is to guide bidders on the completion of standard bidding document forms of the C-BRTA bid.
2. The date on all standard bidding documents must be a date which is within the bid/RFQ/RFP advertising period.
3. The last column of the table below must be ticked as an indication that each document and its requirements have been complied with by the bidder.

DOCUMENT	DIRECTIVE	COMPLIED/ NOT COMPLIED
Invitation to Bid	The bidder is required to complete this document in full and signed off. The bidder must tick (circle/erase) " YES OR NO " on this document. The bidder may not ignore any clause and/or write " not applicable (N/A) " unless it is the only option available, e.g., are you a foreign based supplier for the goods/servicers/works offered? If the answer is no, then on the questionnaire to bidding foreign suppliers. The bidder may write N/A.	
Bidder's Disclosure	This document must be completed in full and be signed off. The bidder must tick (circle/erase) " YES OR NO " on this document and indicate not applicable where necessary. The bidder must disclose if the company or any of its directors have an interest in other companies whether they bid or not. Should a bidder have more companies to declare, such information can be provided on a separate sheet in the format prescribed. The information captured or disclosed for each director/ owner etc must be in line with what is captured in the central supplier database report.	
Central supplier database report	The bidder must attach a Central Supplier Database report printed from https://secure.csd.gov.za/	
Preference points claim form	<p>The bidder must fully complete the SBD form and sign off.</p> <p>The bidder must allocate correct preference points, the preference points claimed will be verified using the following:</p> <ul style="list-style-type: none"> - Broad-Based Black Economic Empowerment Certificate (B-BBEE certificate) - Central Supplier Database report <p>The bidder must submit the documents above to qualify for preference points.</p>	
Pricing schedule	<p>The bidder must complete the supplied pricing schedule and sign-off. The bidder may add other applicable costs which may not be covered by the C-BRTA pricing schedule.</p> <p>In addition, the bidder must submit a detailed price quotation on the company letterhead.</p>	
Bid proposal	The bidder must submit a detailed bid proposal in line with the specifications/terms of reference, if applicable	

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE CROSS-BOARDER ROAD TRANSPORT AGENCY

BID NUMBER:	C-BRTA/HO/0092	CLOSING DATE:	11/02/2026	CLOSING TIME:	11:00
DESCRIPTION	REQUEST FOR PROPOSAL (RFP) PROCESS TO INVITE SUITABLY QUALIFIED SERVICE PROVIDERS TO SUBMIT PROPOSALS FOR THE ACQUISITION, AND IMPLEMENTATION OF A WHATSAPP CHATBOT SOLUTION.				

BID RESPONSE DOCUMENTS MAY BE SUBMITTED VIA THE OFFICIAL EMAIL ADDRESS ON THE COVER PAGE

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:			
CONTACT PERSON	Benjamin Shabangu		CONTACT PERSON	Benjamin Shabangu	
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	Benjamin.Shabangu@Cbrta.co.za		E-MAIL ADDRESS	Benjamin.Shabangu@Cbrta.co.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
[IF YES ENCLOSURE PROOF]			[IF YES, ANSWER THE QUESTIONNAIRE BELOW]		

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS		
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?		
<input type="checkbox"/> YES	<input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?		
<input type="checkbox"/> YES	<input type="checkbox"/> NO	

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?

YES NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?

YES NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?

YES NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

Signature of bidder:	
Capacity Under Which This Bid Is Signed: (Proof of authority must be submitted e.g. company resolution)	
Date:	

1. Introduction to C-BRTA

- 1.1. The Cross-Border Road Transport Agency (C-BRTA) is PFMA Schedule 3A Agency established through the Cross-Border Road Transport Act 4 of 1998 and provides advice, regulation, facilitation and law enforcement in respect of commercial cross border road transportation. The Act gives the C-BRTA mandate to licence commercial cross border road transport operators by issuing permits to operate. The provision of cross-border transport services in South Africa is subject to the provisions of the Cross-Border Road Transport Act. In terms of the Act, any person or organisation wishing to provide cross-border transport services must apply to the Cross-Border Road Transport Agency's Regulatory Committee for a Permit to conduct cross-border business.
- 1.2. The Cross-Border Road Transport Agency's (C-BRTA) thus exists, amongst others, to improve the flow of passengers and freight road transport in the region, introduce regulated competition in cross-border road transport, reduce operational constraints for the cross-border road transport industry, provide oversight and monitoring functions, and to improve the unimpeded transport flow by road of freight and passengers.

2. General rules and instructions

- 2.1. Bidders or their agents shall not make any news releases concerning this RFP or the awarding of the same or any resulting agreement(s) without the consent of, and then only in co-ordination with, C-BRTA and its Client.
- 2.2. Bidders must be registered on the Central Supplier Database (CSD) to be able to conduct business with C-BRTA.
- 2.3. Any bidder who has reasons to believe that the RFP specification is based on a specific brand must inform C-BRTA within three (3) days after the publication of the RFP.
- 2.4. Bidders will be given seven (7) days to correct their non-tax compliance and three (3) days to fully disclose any information on the Standard Bidding Documents (SBD), failure such bidders will be disqualified.
- 2.5. This RFP is subject to Government Procurement: General Contract Conditions – July 2011, Special Contract Conditions and any other contract conditions to be finalised during contracting.

3. Instructions for submitting bids

- 3.1. Bidders should submit their bid responses strictly to the email address on the covering page. Bid responses received outside this email address will NOT be considered.
- 3.2. Bid responses will NOT be considered if submitted after the closing date and time.

4. RFP Returnable

4.1. Bidders shall submit response in accordance with the response format below. Failure to do so shall result in the rejection of the bidder's RFP response.

4.2. Schedule Index:

Schedule 1: Completed and signed SBD 1

Schedule 2: Central Supplier Database (CSD) Registration Report

Schedule 3: Bidder's Tax Compliance System PIN

Schedule 4: Sworn Affidavit or valid B-BBEE Certificate

Schedule 5: Completed and signed SBD 4 – Bidder's Disclosure

Schedule 6: Bidder's Disclosure Annexure A

Schedule 7: Completed and signed SBD 6.1 – Preference Points Claim

Schedule 8: Price quotation in a company letterhead

Schedule 9: Annexure A

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

- 3.1 I have read, and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6.1 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

Signature

.....

Date

.....

Position

.....

Name of bidder

Annexure A – bidders Disclosure form as per section 2.3 of SBD 4 form

Bidders are requested to declare all enterprises/ companies any of its directors/ trustees/ shareholders/members/ partners have interest in, the enterprises/companies disclosed must be equal or more than those disclosed on the Central Supplier Database (CSD) report.

SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:
 - the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
 - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).
- 1.2 The applicable preference point system for this tender is the 80/20 preference point system.
- 1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
 - (a) Price; and
 - (b) Specific Goals.
- 1.4 The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100
- 1.5 Points for specific goals for this tender will be allocated on the basis B-BBEE Status Level as shown in Table 1 below.
- 1.6 In order to claim points for specific goals, bidders must submit B-BBEE Certificate and/or sworn affidavit, as the case may be.
- 1.7 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.8 The organ of state reserves the right to require of a tenderer, either before a tender is

adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) “**tender**” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) “**price**” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “**tender for income-generating contracts**” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “**the Act**” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10
$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$	or	$Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$
Where		
Ps	=	Points scored for price of tender under consideration
Pt	=	Price of tender under consideration
Pmin	=	Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

80/20	or	90/10
$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$	or	$Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)$

Where

Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
- (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

Note to tenderers: *The tenderer must indicate how they claim points for each preference point system.* Thus, tenderers are required to indicate number of points in line with their B-BBBEE Status Level and Ownership

No	The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Means verification of	Number of points claimed (80/20 system) (To be completed by the tenderer)
A	BBBEE Level 1 – 4	10	BBBEE or Sworn affidavit submitted with the bid	
B	Women owned Enterprises	5	Central Supplier Database	
C	Enterprises owned by disabled people	5	Medical report	
D	Total point claimed	D= A + B + C		

5. SUBMISSIONS BY CONSORTIUMS AND JOINT VENTURES

5.1 If a submission is made by a consortium or Joint Venture, the points claimed for ownership must be detailed separately on an attachment showing the following:

- The percentage (%) of the contract allocated to each JV member or consortium member. This should also be included in an agreement to be made available on request by C-BRTA
- The percentage ownership by race category of each JV member or consortium member in each of the specific goals relevant to this bid.
- The total points claimed will be the sum of the percentage contract allocation for each partner multiplied by the percentage weighting for the race category, multiplied by the percentage ownership in the relevant specific goal.

6. DECLARATION WITH REGARD TO COMPANY/FIRM

6.1. Name of company/firm.....

6.2. Company registration number:

6.3. TYPE OF COMPANY/ FIRM

Partnership/Joint Venture / Consortium

One-person business/sole proprietor

Close corporation

Public Company

Personal Liability Company

(Pty) Limited

Non-Profit Company

State Owned Company

[TICK APPLICABLE BOX]

6.4. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and

directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

- (e) forward the matter for criminal prosecution, if deemed necessary.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....
.....
.....

TERMS OF REFERENCE

1. SUMMARY DESCRIPTION

The Cross-Border Road Transport Agency (C-BRTA) is initiating a Request for Proposal (RFP) process to invite suitably qualified service providers to submit proposals for the acquisition, and implementation of a WhatsApp Chatbot Solution.

The solution will be implemented as a pilot initiative to enhance customers services for the permit management and law enforcement functions.

2. BACKGROUND

The C-BRTA is an entity of the Department of Transport. Its mandate is to regulate and facilitate the movement of passengers and goods across borders into neighbouring countries and the rest of the continent.

One of the key functions of the C-BRTA is to issue cross-border permits to various cross-border road transport operators who serve as the C-BRTA's primary clients. The below operators rely on the Agency for cross-border permits, which serve as the primary licenses that enable them to conduct their business of transporting passengers and goods across the borders into the Southern African Development Community region and the rest of the continent. These are the categories of clients who will make use of the required WhatsApp Chatbot service to interact with the Agency.

- Freight operators,
- Passenger operators (Taxi Operations),
- Passenger Operators (Bus Operations), and
- Tour Operators.

The Agency intends to appoint a service provider for the implementation of a WhatsApp Chatbot Solution including support and maintenance for a period of twelve (12) months with the aim of providing superior customer service and improve internal and external customer engagement.

3. CURRENT ENVIRONMENT

a) Current environment

Technologies related to databases and data management and file formats:

Data Management	Technology or product	Status
Relational Database Management Systems (DBMS)	MS SQL Server 2019 MS SQL Server 2022	C STD
Document Management	Microsoft SharePoint 2019 SharePoint Online	STD S

b) Platforms and Storage

Technologies and products related to the C-BRTA's device hardware and operating systems, server hardware and operating systems, storage devices, data backup and recovery solutions and configuration management:

Platforms & Storage	Technology or product	Status
Server Infrastructure (Intel architecture Microsoft Hyper-V)	Dell physical servers Virtual servers Azure VMs	STD STD STD
Server Operating Systems	Windows Server 2022 Windows Server 2019	STD C
Data Backup and Recovery	Veeam Backup and Replication	STD
Data Storage	Dell physical servers Dell SAN storage NAS storage	P/M STD STD

c) Cloud Services and Hosting

Technologies related to cloud services and hosting:

Cloud Solutions	Technology or product	Status
Cloud services	Microsoft Azure	STD

Cloud Solutions	Technology or product	Status
Proprietary hosted cloud solutions	According to specification	E/U

4. TECHNOLOGY STACK

The proposed WhatsApp Chatbot Solution will provide functional and technical support for the Agency's mission-critical system, CrossEasy, operated by the Cross-Border Road Transport Agency (C-BRTA). The CrossEasy system is built on a modern, web-based .NET architecture and leverages standard Microsoft enterprise technologies to ensure scalability, security, and interoperability.

The CrossEasy system is composed of the following core technology components:

Technology	Product	Version	Description
Web Application	Internet Information Services (IIS) Node JS	10.0	HTTPS server and .NET platform
Mobile application	JavaScript framework (Angular)	8	Builds native apps for iOS, Android, Windows, and macOS on a shared .NET codebase
Identity and Access Management	Microsoft Azure Active Directory	N/A	Identity and access management for internal users
Report engine	SQL Server Reporting Services (SSRS)	2022	Create and manage reports from web browser and mobile devices
Database server	Microsoft SQL Server Standard	2022	Database engine for hosting instances of the iCBMS databases
Document Repository	Microsoft SharePoint Server	2019	Document Management System for storing uploaded documents
Operating System	Microsoft Windows Server	2022	Microsoft's operating system
Virtualized computing environment	Microsoft Hyper-V	2016	Run multiple operating systems on one physical computer
Business Intelligence	Microsoft Power BI Premium Embedded	N/A	Reports - BI platform and application embedded.

Table 1: CrossEasy Technology Stack

5. CROSSEASY SYSTEM ARCHITECTURE

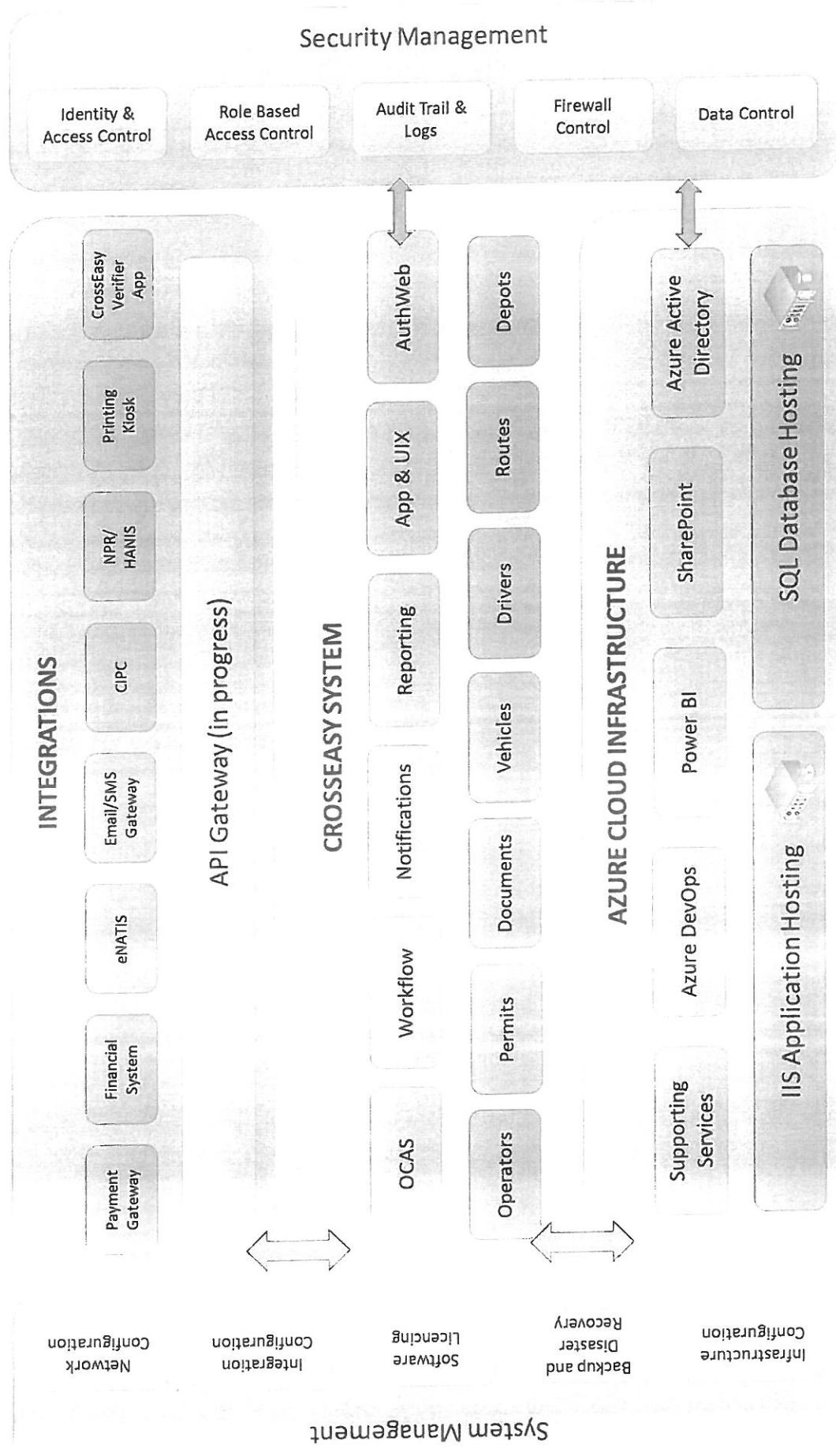


Figure 1: CrossEasy System Architecture

TERMS OF REFERENCE FOR ACQUISITION AND IMPLEMENTATION OF A CHATBOT SOLUTION INCLUDING SUPPORT AND MAINTENANCE FOR A PERIOD OF 12 MONTHS

6. SCOPE OF WORK

6.1 The Proposed WhatsApp Chatbot Solution should have the below features:

The AI-powered virtual assistant must be developed for the Cross-Border Road Transport Agency (C-BRTA) to support users of the Agency's mission-critical system, CrossEasy. The chatbot must provide instant, intelligent, and self-service support to operators, stakeholders, and internal users engaging with the CrossEasy system.

Key Features and Purpose of WhatsApp chatbot

1. AI-Driven Conversational Support

The chatbot must leverage artificial intelligence and natural language processing to interact with users in real time, enabling intuitive, conversational access to CrossEasy-related information and services.

2. CrossEasy System Assistance

The chatbot must assist users with common CrossEasy queries, including system navigation, permit and application processes, compliance requirements, status enquiries, and interpretation of system notifications—based strictly on official C-BRTA rules and data.

3. Enhanced Self-Service and Accessibility

By providing 24/7 automated support, the chatbot will reduce reliance on call centres and in-person assistance, improving service turnaround times while increasing accessibility for cross-border transport operators operating across multiple regions.

4. Secure and Integrated Digital Service

The chatbot must integrate securely with the CrossEasy system and related Microsoft-based enterprise platforms, ensuring controlled access to information, auditability, and compliance with ICT governance and data protection standards.

5. Digital Transformation Enablement

As a pilot initiative, the chatbot will support C-BRTA's broader digital transformation objectives by modernising customer engagement, improving operational efficiency, and enhancing the overall user experience of the CrossEasy platform.

6.2 The successful bidder is required to implement a chatbot solution for the C-BRTA as per the below:

1. The chatbot solution is an AI-enabled virtual assistant that must be developed for the Cross-Border Road Transport Agency to support users of the Agency's mission-critical CrossEasy system. The chatbot will be deployed via **WhatsApp and the CrossEasy system** to provide secure, real-time, and self-service assistance to operators, stakeholders, and internal users interacting with the CrossEasy system.
2. The chatbot solution will leverage artificial intelligence and natural language processing capabilities to respond to CrossEasy-related enquiries, including system navigation, permit and application processes, compliance requirements, status tracking, and interpretation of system notifications, based on approved C-BRTA business rules and data.
3. The solution is intended to operate on a 24/7 basis, reducing dependency on call centre, e-mails and manual support channels, improving service turnaround times, and enhancing accessibility for cross-border road transport operators.
4. The chatbot solution must integrate securely with the CrossEasy system and the Agency's Microsoft-based enterprise environment, ensuring data protection, auditability, and compliance with applicable ICT governance and regulatory standards. As a pilot initiative, the chatbot will contribute to C-BRTA's digital transformation agenda by improving operational efficiency and strengthening stakeholder engagement.
5. The successful bidder must provide implementation and support for a period of 12 months. Furthermore, provide proposal, pricing and project implementation plan.

6.3 Special Conditions

- a) The Service Provider may not disclose C-BRTA confidential information through, during or after the provision of this service.
- b) The Service Provider must demonstrate compliance to applicable legislation and regulations.
- c) The Service Provider must demonstrate the security capabilities of the solution proposed.
- d) The Service Provider should provide cost effective yet reliable software platform options.
- e) The successful bidder must have prior experience in the development of a comprehensive a Chatbot application or solution.

7. BRIEFING SESSION

A non-compulsory briefing session will be held via Microsoft Teams on xxx, from 11h00 to 12h00.

Meeting link:

Meeting ID:

Meeting passcode:

8. TECHNICAL EVALUATION

This bid will be evaluated using the 80/20 preference points system in terms of the Preferential Procurement Regulations 2022. The following three (3) phases will be followed to evaluate this bid:

- Administrative Compliance – Phase 1
- Functionality Evaluation – Phase 2
- Price and Specific Goals – Phase 3

8.1 PHASE 1: ADMINISTRATIVE COMPLIANCE

Documents that must be submitted	Non-submission of any of the items against which a YES is denoted shall result to immediate disqualification	
Invitation to Bid – SBD 1	Complete and sign the supplied pro forma document	NO
Tax Status	Submit proof of Central Supplier Database report. NB: The bidder will be given Seven (7) days to correct tax non-compliance prior award, failure will result to a disqualification.	NO
Bidders Disclosure Form – SBD 4	Complete and sign the supplied pro-forma document	NO
Preference Point Claim Form – SBD 6.1	Complete and sign the supplied pro-forma document Non-submission will lead to a zero (0) score on Specific goals	NO
Pricing Schedule	Submit full details of the pricing proposal	YES

8.2 PHASE 2: FUNCTIONALITY EVALUATION

- Only bidders that meet the minimum required points (70 out of 100 points), will be evaluated in terms of presentation evaluation phase.
- Bidders that score less than 70 points out of 100 points in respect of overall functionality will be disqualified for further evaluation.

FUNCTIONALITY CRITERIA	SCORE/POINTS
<p>COMPANY TRACK RECORD</p> <p>Reference letters from clients as evidence of related work/services previously and successfully completed of a similar nature.</p> <p>NB: The Reference Letter(s) must be on the <i>letterhead of the previously serviced client</i>. It should reflect at least name of the client, description of the service(s) conducted, date, contactable reference name and contact details and signed by the appropriate delegate (A reference letter that does not include the any of the above criteria will not be considered)</p> <ul style="list-style-type: none"> • Non-submission/ irrelevant reference letters = 0 points • 1-2 Letters attached = 10 points • 3 Letters attached = 15 points • 4 or more letters attached = 20 points 	20

FUNCTIONALITY CRITERIA	SCORE/POINTS															
<p>TEAM CAPABILITY/ EXPERIENCE</p> <p>The personnel proposed to this project must have at least three (3) years previous experience in the implementation and support of a Chatbot Solution.</p> <p>NB: Bidder to provide CVs for Implementation Team Personnel as Portfolio of Evidence. CVs should indicate the relevant experience of implementation as well as the Support and Maintenance.</p> <ul style="list-style-type: none"> • Experience in years per resource demonstrating role and organisation where the resource was successfully implementing, maintaining and supporting similar solutions. • Provide a minimum of 3 CV's of implementation and support team. <p>NB: ensure the CV's are attached.</p> <table border="1"> <thead> <tr> <th>Technical areas</th><th>6+ years</th><th>5 years</th><th>3-4 years</th><th>0-2 years</th></tr> </thead> <tbody> <tr> <td>Project Implementation</td><td>20 points</td><td>15 points</td><td>10 points</td><td>0 points</td></tr> <tr> <td>Support and Maintenance</td><td>20 points</td><td>15 points</td><td>10 points</td><td>0 points</td></tr> </tbody> </table>	Technical areas	6+ years	5 years	3-4 years	0-2 years	Project Implementation	20 points	15 points	10 points	0 points	Support and Maintenance	20 points	15 points	10 points	0 points	40
Technical areas	6+ years	5 years	3-4 years	0-2 years												
Project Implementation	20 points	15 points	10 points	0 points												
Support and Maintenance	20 points	15 points	10 points	0 points												
<p>TECHNICAL APPROACH</p> <p>Bidders must demonstrate the technical approach to execute the project and ensure successful deployment based on their understanding of the requirements and scope of work of the following criteria:</p> <ul style="list-style-type: none"> • Provide Implementation plan detailing the approach to configuration, customization and implementation of a WhatsApp Chatbot solution = 5 points • Describe Integration capabilities with the CrossEasy system = 15 points • Describe Information Security Capabilities = 10 points • Describe Change Management Capabilities of organisation (i.e. system and people change management) = 5 points • Describe Support and Maintenance Approach = 5 points <p>Full points (per criteria) will be allocated for sufficient information that is provided in the proposal that demonstrates the technical approach, and</p>	40															

FUNCTIONALITY CRITERIA	SCORE/POINTS
zero (0) points will be allocated (per criteria) for no, poor or insufficient information provided.	
Total points	100

9. COSTING / PRICING

9.1 Implementation Costs

Item Description	Quantity Amount (Incl. VAT)
Implementation and configuration of WhatsApp Chatbot Solution (Once off)	R
Support and maintenance (9 months retainer)	R
TOTAL (Including VAT)	R