

**Italy-Rome: Portfolio management services**

OJ S 141/2021 23/07/2021

**Contract notice****Services****Legal Basis:**

Directive 2014/24/EU

**Section I: Contracting authority**

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**I.1. Name and addresses**

Official name: Associazione cassa nazionale di previdenza ed assistenza a favore dei ragionieri e periti commerciali

Postal address: via Pinciana 35

Town: Roma

NUTS code: ITI43 Roma

Postal code: 00198

Country: Italy

E-mail: [antonino.triscari@pec.cassaragionieri.it](mailto:antonino.triscari@pec.cassaragionieri.it)

Telephone: +39 0684467261

**Internet address(es):**

Main address: <http://www.cassaragionieri.it>

**I.3. Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at: <http://www.cassaragionieri.it>

Additional information can be obtained from the abovementioned address

Tenders or requests to participate must be submitted electronically via: <https://albofornitori.cassaragionieri.it>

Tenders or requests to participate must be submitted to the abovementioned address

Electronic communication requires the use of tools and devices that are not generally available. Unrestricted and full direct access to these tools and devices is possible, free of charge, at: <https://albofornitori.cassaragionieri.it>

**I.4. Type of the contracting authority**

Other type: ente previdenziale associativo senza scopi di lucro con personalità giuridica di diritto privato secondo le disposizioni del decreto legislativo 30.6.1994 n. 509

**I.5. Main activity**

Social protection

**Section II: Object**

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**II.1. Scope of the procurement****II.1.1. Title**

Procedura aperta per la sottoscrizione di un accordo quadro con individuazione di 5 soggetti cui affidare la gestione del patrimonio mobiliare della Cassa Ragionieri

**II.1.2.**

**Main CPV code**

66140000 Portfolio management services

**II.1.3. Type of contract**

Services

**II.1.4. Short description**

Procedura aperta ai sensi degli articoli 59 e 60 del D.Lgs. n.50/2016 per la sottoscrizione di un accordo quadro con individuazione di 5 soggetti cui affidare la gestione del patrimonio mobiliare dell'Associazione cassa nazionale di previdenza ed assistenza a favore dei ragionieri e periti commerciali.

**II.1.5. Estimated total value**

Value excluding VAT: 24 005 013,62 EUR

**II.1.6. Information about lots**

This contract is divided into lots: no

**II.2. Description****II.2.3. Place of performance**

NUTS code: IT Italia

**II.2.4. Description of the procurement**

Procedura aperta ai sensi degli articoli 59 e 60 del D.Lgs n.50/2016 per la sottoscrizione di un accordo quadro con individuazione di 5 soggetti cui affidare la gestione del patrimonio mobiliare dell'Associazione cassa nazionale di previdenza ed assistenza a favore dei ragionieri e periti commerciali.

**II.2.5. Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

**II.2.6. Estimated value**

Value excluding VAT: 24 005 013,62 EUR

**II.2.7. Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months: 48

This contract is subject to renewal: yes

Description of renewals:

Rinnovo per 36 mesi + proroga per 6 mesi.

**II.2.10. Information about variants**

Variants will be accepted: no

**II.2.11. Information about options**

Options: no

**II.2.13. Information about European Union funds**

The procurement is related to a project and/or programme financed by European Union funds:  
no

**II.2.14. Additional information****Section III: Legal, economic, financial and technical information**

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### **III.1. Conditions for participation**

#### **III.1.1. Suitability to pursue the professional activity, including requirements relating to enrolment on professional or trade registers**

List and brief description of conditions:

Tutte le informazioni e condizioni sono disponibili nei documenti di gara pubblicati sul sito web della cassa [www.cassaragionieri.it](http://www.cassaragionieri.it) > cassa trasparente > bandi di gara e contratti > bandi di gara in corso > servizi.

#### **III.1.2. Economic and financial standing**

Selection criteria as stated in the procurement documents

#### **III.1.3. Technical and professional ability**

Selection criteria as stated in the procurement documents

### **III.2. Conditions related to the contract**

#### **III.2.1. Information about a particular profession**

Execution of the service is reserved to a particular profession Reference to the relevant law, regulation or administrative provision:

Tutte le informazioni e condizioni sono disponibili nei documenti di gara pubblicati sul sito web della cassa [www.cassaragionieri.it](http://www.cassaragionieri.it) > cassa trasparente > bandi di gara e contratti > bandi di gara in corso > servizi.

#### **III.2.2. Contract performance conditions**

Tutte le informazioni e condizioni sono disponibili nei documenti di gara pubblicati sul sito web della cassa [www.cassaragionieri.it](http://www.cassaragionieri.it) > cassa trasparente > bandi di gara e contratti > bandi di gara in corso > servizi.

## **Section IV: Procedure**

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### **IV.1. Description**

#### **IV.1.1. Type of procedure**

Open procedure

#### **IV.1.3. Information about a framework agreement or a dynamic purchasing system**

The procurement involves the establishment of a framework agreement

Framework agreement with several operators Envisaged maximum number of participants to the framework agreement: 5

#### **IV.1.8. Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: no

### **IV.2. Administrative information**

#### **IV.2.2. Time limit for receipt of tenders or requests to participate**

Date: 30/09/2021 Local time: 12:00

#### **IV.2.3. Estimated date of dispatch of invitations to tender or to participate to selected candidates**

#### **IV.2.4. Languages in which tenders or requests to participate may be submitted**

Italian

#### **IV.2.6. Minimum time frame during which the tenderer must maintain the tender**

Duration in months: 6 (from the date stated for receipt of tender)

#### **IV.2.7. Conditions for opening of tenders**

Date: 11/10/2021 Local time: 10:00

Place:

Roma, via Pinciana 35 — in considerazione dell'emergenza da Covid 19 la partecipazione alle sedute pubbliche sarà consentita solo in modalità telematica.

### **Section VI: Complementary information**

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#### **VI.1. Information about recurrence**

This is a recurrent procurement: no

#### **VI.2. Information about electronic workflows**

Electronic invoicing will be accepted

#### **VI.3. Additional information**

Fattura elettronica con split payment

#### **VI.4. Procedures for review**

##### **VI.4.1. Review body**

Official name: Tribunale amministrativo regionale per il Lazio, sede di Roma

Postal address: via Flaminia 189

Town: Roma

Postal code: 00196

Country: Italy

Telephone: +39 06328721

##### **VI.4.4. Service from which information about the review procedure may be obtained**

Official name: TAR Lazio

Town: Roma

Country: Italy

##### **VI.5. Date of dispatch of this notice**

19/07/2021