

The preliminary phase of complex transformation plans,  
comparing the Italian and the UK approach.

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## **The preliminary phase of complex transformation plans, comparing the Italian and the UK approach.**

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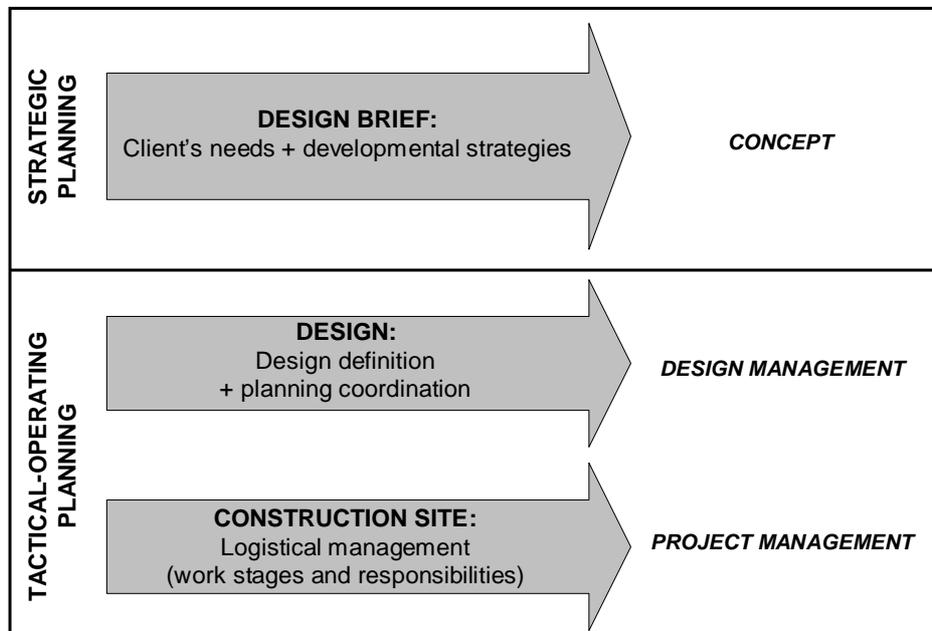
## 1. Introduction: the preliminary phase of the real estate development process

The project management approach is recommended with every kind of project, even if there are different dimensions and different levels of complexity: managing the construction of a standard real estate property is obviously easier than planning a large transformation plan.

During the last few years, urban and territorial transformations represent, on the one hand, scenarios characterized by great interests, investments and profits and, on the other hand, contexts in which both public and private stakeholders express social, political and economic interests.

The methodological and procedural complexity, that characterize these types of projects, is an unavoidable factor that underlines the absolute necessity of a multidisciplinary approach: furthermore it is necessary a planned coordination between the people involved and the multiple variables to be controlled and evaluated.

The preliminary phase of complex transformation plans is a very crucial moment, during which several competences have to analyze uncertainties and risks associated with the project and to define important strategic managements as well as concrete solutions.



**Figure 1: The preliminary phase of the real estate development process**  
(Source: Elaborated by the author)

During this phase many and different kind of decisions are to be taken: initially (strategic planning) it is absolutely necessary to structure the design brief, fundamental to clarify clients needs – public or private – and to define concretely the development strategies for the project.

Therefore, in a second moment (tactical-operating planning) it is necessary to translate the design brief into practical aspects, pointing out the operational modes required to realize the project, scheduling the pre-construction and construction phases, establishing administrative procedures and identifying roles and responsibilities within the project team.

In fact, parallel to the conceptual process, the project must follow a series of procedures that scan the administrative process. These practices constitute an essential reference point along the entire real estate development process, starting from the strategic planning up to the project completion.

Every country has its own specific practices and laws that regulate the whole process, specifying the phases to follow, the necessary professional roles and the types of contract to subscribe in order to realize the project or to supply services.

Comparing the Italian and the UK approach, it is possible to underline some differences related to the setting of the projects preliminary phase, analyzing both the procedures and the project team management.

In fact, analyzing the foremost factors that contribute to the project success, it is fundamental to consider the most crucial phases of the real estate development process (Chapter 2), the most leading roles within the project (Chapter 3), the importance of every single task involved – the Client, the Design Manager, the Project Manager, contractors, sub-contractors, etc. – and their coordination. A rational and correct partitioning of roles and responsibilities guarantees efficiency and often higher qualitative standards.

The aim of the present paper is to compare the Italian and the UK practices, in order to underline the aspects that could improve the Italian approach, during the strategic and tactical-operating planning of complex transformation plans. All the considerations inherent to the UK project team structure and to the responsibilities of each professionalism result from a research experience at a great construction company – carried out during a PhD in Environment and Territory (Estimate and Assessment address) at the Polytechnic of Turin – during which the author interviewed some Design Managers about the management of important real estate development processes in London.<sup>1</sup>

## **2. The *briefing* phase in the Italian and the UK approach**

Analyzing the procedures and laws in the Italian and in the UK context, it is possible to find different approaches finalized to simplify the complexity of the real estate development process.

In Italy, the real estate development process has been clearly defined in the field of public projects by the following normative references:

- L. n.109 – 11/02/1994 (“Legge Merloni”);
- D.L. 163/2006 (“Codice dei contratti pubblici relativi a lavori, servizi e forniture”): published in the “Gazzetta Ufficiale n.100 – 02/05/2006”;
- DPR 5/10/2010, n. 207 (Regolamento di esecuzione ed attuazione del decreto legislativo 12 aprile 2006, n. 163, recante il Codice dei contratti pubblici relativi a lavori, servizi e forniture in attuazione delle direttive 2004/17/CE e 2004/18/CE”): published in the “Gazzetta Ufficiale n. 288 - 10/12/2010”<sup>2</sup>.

Observing the phases and the administrative procedures that the Italian law provides, it is evident the fact that the tactical-operating planning is more well-detailed than the strategic planning.

In fact, the phases of the process result essentially characterized by operating procedures, finalized to detail the project and manage activities and human resources involved during the construction of an already defined design.

Considering the strategic planning in the Italian approach, it is clear that the brief development and the design concept definition are not well and explicitly deepened.

The first document that the Italian law provides is the feasibility study, that is usually structured on the basis of an already quite well detailed design. It includes a document composed by the following items:

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<sup>1</sup> Cfr. Rolando, D. (2009). *Pianificazione strategica e operativa in fase preliminare: valutazioni a supporto delle strategie di sviluppo nei progetti di trasformazione complessi. L'approccio Strategic Choice applicato al caso della Tangenziale Est di Torino*, Ph.D. thesis (presenter: Prof. Rocco Curto – Co-presenter: Prof. Bruno Bianco).

<sup>2</sup> The DPR 5/10/2010, n. 207 will come into effect from 08/06/2011.

- a) the functional, technical, administrative, economic and financial project details;
- b) the analysis of the possible alternatives;
- c) the verification of the possibility to subscribe a PPP contract;
- d) the analysis of the context where the project is sited, under an architectonic, geological, social, economic and administrative point of view;
- e) the environmental and landscape sustainability and compatibility valuation through the requirements of the project, the links between the project and the context (with a particular attention to the environmental, historical, archaeological and landscape restrictions) as well as all the necessary measures finalized to the environment and cultural protection.

If the feasibility study has to be valuated during a competitive tender, it is structured in the following even more detailed documents:

- a) a general description that includes:
  1. the analysis of the territorial, social and economic context where the project is sited;
  2. the analysis of the actual and the expectable supply and demand;
  3. the analysis of the possible alternatives;
  4. the environmental impact analysis related both to the defined design and to the alternatives;
- b) a technical description that includes:
  1. the functional and technical project characteristics;
  2. the description of the requirements of the project, the characteristics and links with the context and all the necessary measures finalized to the environment and cultural protection, in order to evaluate the environmental and sustainability and landscape compatibility;
  3. a brief analysis of the construction techniques and the compulsory technical standards;
  4. the project timetable;
  5. a brief analysis of the costs related to the realization of the project;
- c) technical drawings requested by the *Responsabile del Procedimento*;
- d) a technical-economic document that includes:
  1. the verification of the possibility to realize the project through a concession on the contract;
  2. analysis of the financial feasibility (cost and yield analysis) concerning the construction phase and, in case of concession, the running phase;
  3. analysis of the economic and social feasibility (cost and benefit analysis);
  4. rates and fess frame (in case of concession);
  5. contract essential guidelines.<sup>3</sup>

Obviously, even if the Italian laws do not prefigure a specific and compulsory preliminary step, before structuring a feasibility study, it is necessary to very well understand the client's needs and to clarify the most important development strategies.

For this reason it is possible to admit that the Italian approach to the project is better detailed from an operating point of view, rather than accurate in a strategic perspective.

Nevertheless, analyzing the Italian literature related to the project management, it is possible to find some approaches in which the project life-cycle includes also a phase related to the objectives definition (Fregonara, 2011).

The UK approach, instead, is based on the Riba (Royal Institute of British Architects) Plan of Work, the most important reference point for architects, constructors and Project Managers in structuring the real estate development process. Published for the first time in 1964, the Riba Plan of Work is periodically updated; it includes both the administrative and strategic steps, structuring a logical activities sequence, finalized to plan every single work stage of the process and to support roles and

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<sup>3</sup> Cfr. DPR 5/10/2010, n. 207, Art.14 "Studio di fattibilità".

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responsibilities within the project team (client, Project Managers, architects, structural engineers, etc.). The Riba Plan of Work divides the real estate development process – public or private – in 5 phases and 12 work stages:

RIBA Work Stages		Description of key tasks	OGC Gateways
Preparation	A	Appraisal	1 Business justification
	B	Design Brief	
Design	C	Concept	2 Procurement strategy
	D	Design Development	
	E	Technical Design	3A Design Brief and Concept Approval
Pre-Construction	F	Production Information	
	G	Tender Documentation	

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	H	Tender Action	<i>Identification and evaluation of potential contractors and/or specialists for the project.</i> <i>Obtaining and appraising tenders; submission of recommendations to the client.</i>	3C Investment decision
	J	Mobilisation	Letting the building contract, appointing the contractor. Issuing of information to the contractor. Arranging site hand over to the contractor.	
Construction	K	Construction to Practical Completion	Administration of the building contract to Practical Completion. Provision to the contractor of further Information as and when reasonably required. Review of information provided by contractors and specialists.	4 Readiness for Service
	L	Post Practical Completion	L1 Administration of the building contract after Practical Completion and making final inspections. L2 Assisting building user during initial occupation period. L3 Review of project performance in use.	
Use				

The activities in italics may be moved to suit project requirements, ie:

- D Application for detailed planning approval;
- E Statutory standards and construction safety;
- F1 Application for statutory approvals; and
- F2 Further information for construction.
- G+H Invitation and appraisal of tenders

**Table 1: Riba Outline Plan of Work**  
(Source: Royal Institute of British Architects).

Analyzing the main activities included in each of the 5 phase, it is evident the importance in structuring, developing and constantly improving the design brief that the Riba Plan of Work gives during in the initial work stages:

- A. *Appraisal*;
- B. *Design Brief*;
- C. *Concept*;
- D. *Design Development*.

In particular, during the *Design* phase it is required the concept and the design brief approval, before the *Detailed Design Approval* that marks the end of the strategic planning and the beginning of the tactical-operating planning. In fact, the *Detailed Design Approval* determines the end of the briefing process, a very important step because, after it, every design modify could delay deadlines and seriously increase planned costs.

Considering all these aspects, it is possible to admit that the real estate development process should always prefigure a specific phase for structuring the design brief: in fact the briefing phase represents a tricky and fundamental step in determining the project success, during which the client's needs and expectations have to be analyzed and shared with all the stakeholders involved, in order to include them into the contract and into the design details.

The design brief analysis, in Italy not very much considered, is an absolutely necessary starting point in the project planning, fundamental in structuring and solving several decisional problems, like, for example, choosing the best location, the best design solution or identifying the most significant indicators for the evaluation of the technical, economical, environmental and social sustainability.

Both Public Administrations and private developers should consider the briefing phase like a demanding and complex procedure, that requires not only the activities scheduling, but also an accurate coordination between the people involved.

A plain and complete brief constitutes a fundamental instrument for structuring the client's objectives, defining strategic choices and orientating the pre-construction and construction phases.

For this reason the briefing phase could be considered the first tricky step in complex transformation plans, in case of both private and public projects: structuring the decisional complexity, indeed, is an essential approach for every kind of project that necessity development strategies and accurate planning.

Therefore, it is evident that during the preliminary phase it is absolutely necessary an integrated evaluation, able to analyze the main decision problems and to structure the design brief, in order to guarantee the economic, social and environmental sustainability of the project, without forgetting the technical aspects and the expectations of every stakeholder.

### 3. The project team in the Italian and UK context

In order to understand the logistic and organizational complexity that characterizes the preliminary phase of projects, it is important to analyze not only the work stages and the management procedures, but also the different competences within the project team. Considering the roles number and the variety related to an entire complex transformation plan, it is evident the necessity of a thorough management and a continuous coordination between the people involved.

In Italy, the T.U.S.L. (Testo Unico Sicurezza Lavoro – D.Lgs. 81/2008)<sup>4</sup> outlines a series of professional figures usually involved in the construction sites:

- the Client;
- the *Responsabile dei Lavori* (or *Responsabile Unico del Procedimento* in case of public project);
- the *Coordinatore per la progettazione* (CP);
- the *Coordinatore per l'esecuzione lavori* (CEL);
- the *Direttore Lavori*;
- the *Direttore operativo*;
- the *Ispettore di cantiere*;
- the Architect;
- the *Organo di collaudo*;
- the *Organismi di controllo* (in case of public projects);
- the Authorized Doctor;
- the Contractor;
- the Sub-contractors;
- the *Rappresentante dei Lavoratori per la Sicurezza* (RLS).

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<sup>4</sup> The T.U.S.L. (Testo Unico Sicurezza Lavoro - D.Lgs. 81/2008), repealed the D.Lgs. 494/1996.

Referring to a more specific analysis to deepen the roles of every competence contemplated in the T.U.S.L., this paper wants to underline the professionalisms in charge of the management and coordination tasks during the preliminary phase, that are:

- the *Responsabile dei Lavori* (or *Responsabile Unico del Procedimento* in case of public project);
- the *Coordinatore per la progettazione* (CP);
- the *Coordinatore per l'esecuzione lavori* (CEL).

In Italy one of the most central roles is undertaken by the *Responsabile dei Lavori*, often commissioned directly by the client in order to delegate him every responsibilities. The *Responsabile dei Lavori* is in charge of the design control and the project completion and he could coincide with the architect, during the designing phase, or with the *Direttore Lavori*, during the execution phase.

In case of public projects, the *Responsabile dei Lavori* is identified as the *Responsabile Unico del Procedimento*, but he couldn't coincide neither with the architect nor with the *Direttore Lavori*: he is usually the same person as the Manager of the Public Administration Technical Office that has to guarantee the general laws and procedures respect.

Analyzing the D.Lgs 163/2006 (Public Contracts Codice), it is evident the fact that the *Responsabile Unico del Procedimento*'s competences are very similar to the *Responsabile dei Lavori*'s responsibilities, concerned on the following control and coordination activities:

- health and safety risk management;
- scheduling the project work stages;
- checking the Technical Report and the *Piano di Sicurezza e Coordinamento* (PSC) correctness;
- commissioning the *Coordinatore per la progettazione* (CP), the *Coordinatore per l'esecuzione* (CEL), the *Direttore Lavori* and the *Collaudatore*;
- verifying the contractor technical and professional qualification before the beginning of the construction phase;
- sending to every potential contractor, during the competitive tender, the invitation to present the economical offer, the PSC and the final design;
- analyzing urban and environmental conditions in order to verify the project preliminary feasibility;
- identifying the team in charge of the brief and technical designing;
- preparing the bid and managing its correct process;
- legal and technical due diligence on the properties concerned into the project;
- verifying the contractual prescriptions and the correctness and legitimacy of any variations during the construction phase;
- checking the beginning, the eventual interruptions and the end of the construction site;
- contracts, controversies and penalties management.

Other two important roles during the preliminary phase of the project are the *Coordinatore per la progettazione* and the *Coordinatore per l'esecuzione dei lavori*, both commissioned by the client or by the *Responsabile dei Lavori*.

The principal responsibilities of the *Coordinatore per la progettazione* are essentially related to two important compulsory documents finalized to improve the safety levels during the construction phase and the following maintenance management:

- the *Piano di Sicurezza e di Coordinamento* (PSC);
- the Technical Report, containing the necessary information to protect the workers and regulate the ordinary and extraordinary repairs.

Instead the competences of the *Coordinatore per l'esecuzione dei lavori* are concerned on the control of every documental and technical requirements related to the design execution:

- verify of the PSC implementation;
- verify of the *Piano Operativo di Sicurezza* (POS) correctness and its consistency with the PSC;
- people coordination and activities management;
- PSC adaptation (in case of design variations or unexpected issues);

- PSC editing (in case of several contractors);
- construction interruption or contract cancellation (in case of serious danger or professional misconducts).

A crucial role, not provided by the T.U.S.L., that in Italy is going to be more considered during the last few years – in the context of large private projects – is the Developer, often fundamental during the preliminary phase.

It is important to underline that the Developer could have different competences on the basis of the project and of the type of signed contract: he could be the project financial baker (that very often coincides with the client) or he could represent the client as a consultant that goes between the construction company and all the stakeholders involved during the entire real estate development process.

In the first case (“equity development”), the development society is not commissioned by any client, because of it directly buys properties from the owners, investing equity and considering to get a satisfying profit after the final sale.

In the second case (“fee development”), indeed, the development society supports the client during every development phases, requiring a fee proportioned to the entity of the project and calculating it on the basis of total costs.

This difference is fundamental in order to understand how roles and responsibilities could change during the structuring of the design brief, one of the most crucial moment of the real estate development process. In the context of “fee development”, the Developer has to structure the design brief considering the client’s needs and converting them into the project; if the Developer coincides with the client (“equity development”) the design brief do not necessitate to be so clearly defined, because it often reflects the company mission.

In the context of public projects in Italy it is rarely necessary the competence of the Developer. In fact, the Public Administrations are interested in developing their own properties (acquired or dispossessed) without any outsider consultants supports; they usually commission the project coordination to an insider advisory body, like the Technical Offices.

The only person who could be asked to structure a sort of design brief is the *Responsabile del Procedimento*, even if his competence according to the Italian laws, as we have already explained, is more tactical-operating than strategic.

For this reason is it possible to admit that in Italy, especially in the context of public projects, there is not a specific role in charge of structuring the design brief during the preliminary phase of the real estate development process.

In the UK context, the competences considered within a project team are comparable, in part, to the roles provided by the Italian T.U.S.L, even if with some differences.<sup>5</sup>

The first difference is about the number of roles required to plan and complete a project: in the UK the human resources management is based on a very detailed subdivision, so that the competences result more numerous and more specialized than the Italian ones.

The most representative difference, that this paper wants to underline, is referred to the responsibilities of the following roles:

- the Design Manager, whom competences could not be directly comparable to any role provided by the Italian laws;
- the Project Manager, partially comparable to the *Responsabile dei Lavori* (or *Responsabile Unico del Procedimento* in case of public project);
- the Project Director, partially comparable to the *Direttore Lavori*.

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<sup>5</sup> It is important to underline that all the considerations inherent to the UK project team structure and to the responsibilities of each professionalism result from a research experience at a great construction company – carried out during a PhD in Environment and Territory (Estimate and Assessment address) at the Polytechnic of Turin –, during which the Author interviewed some Design Managers about the management of important real estate development processes in London (Rolando, 2009).

The Design Manager is responsible for a correct design brief adherence from a technical and economic point of view, trying, when it is possible, to increase profits and to reduce risks associated with the project. Another responsibility of the Design Manager consists in developing the design programme, a sort of preliminary version of the PEP (Project Execution Plan) shared within the project team that represents the reference point in scheduling deadlines, meetings and deliveries.

Managing the real estate development process, the Design Manager is often supported by two people: the Document Manager, in charge of contracts control (as well as deadlines and planned costs), and the Package Manager, in charge of buying orders arrangement and the general construction phase control, including the required quality standards.

So, the Design Manager has to take under control eventual design variations and the technical, economic and procedural consequences, without forgetting the initial briefing.

It is finally important to underline that the Design Manager's role could partially change on the basis of the competences concerned and the complexity level of the project; roles and responsibilities are to be defined in conjunction with the Project Manager, obviously before their assignment.

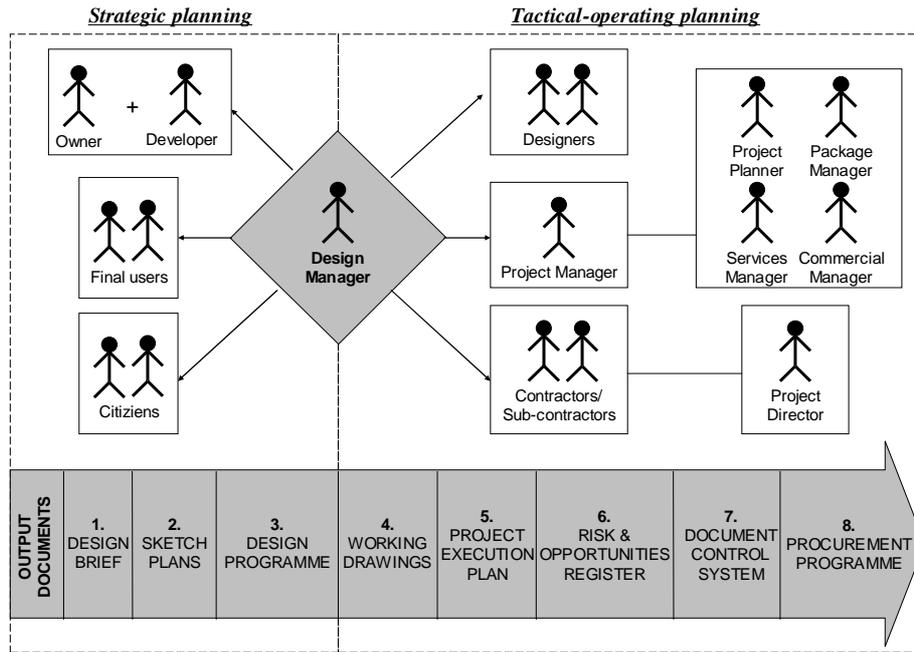
The Project Manager, one of the most important reference point in the construction management, is in charge of the PEP (Project Execution Plan) definition, the document finalized to manage the construction sites and their progress. Developing the PEP, the Project Manager is supported not only by the Design Manager, but also by the project planner, in order to advise everybody involved into the project about the PEP contents.

The Project Manager, with the Commercial Manager support, is also responsible for the Risk & Opportunities Register, containing the expectable risks, their impact on the project deadlines and the related mitigation strategies. The Risk & Opportunities Register represents a fundamental document in the strategic project management: it is important to underline the fact that the work stages have to be managed not only considering an operating point of view, but also with a strategic vision that helps to identify the best concrete solutions and to control the most important risks.

The document utilized by the Commercial Manager to manage the contract is the Procurement Programme, finalized to control every single commercial activity like planning costs, risks control, cash flows prevision, instructions for sub-contractors, variations, reclaims, intermediate payments, buying orders, sub-contractors final invoices, working days and related burdens.

A specific but not less important aspect to consider in the general project management concerns the services and plant design; the person responsible for it is the Services Manager, in charge of controlling and monitoring the services furniture and verifying the client and the final user satisfaction along the entire contract term.

Another important document is the Document Control System, utilized by the Project Manager and the Project Director to monitor every document checking and registration, and to communicate clearly to the entire project execution team the real estate development process in its costs, deadlines and quality standards implications.



**Figure 2: The key role of the Design Manager in the UK**  
(Source: Elaborated by the author)

Analyzing on the whole the UK project team, there is a competence that results particularly crucial to understand the general attention in structuring and converting the design brief: the Design Manager.

The Design Manager, coordinating all the competences involved, guarantees the respect of the design brief, during both the strategic planning and the tactical-operating planning; for this reason the Design Manager has to thoroughly know the contractual aspects, so that he could be the main reference point for the architects, the Project Manager, the contractor (and eventually sub-contractors), the Developer and every specialized consultant involved into the project construction. The Design Manager on the one hand has to define and control roles, responsibilities and deadlines, relating them with available resources, planned activities and expected quality standards; on the other hand he has to understand and interpret the client's requirements, the final users needs and sometimes also the community expectations.

For this reason the Design Manager could be considered the main responsible in converting the design brief in formal and practical requirements, representing a fundamental connection between the strategic and the tactical-operating planning.

In conclusion, analyzing the project team as the Italian laws provide, it is evident the fact that the competences and responsibilities are essentially oriented to the project management during the construction phase and so to a tactical-operating planning. Indeed, as the phases of the project analysis underlined in Chapter 2, the Italian approach could be considered more concentrated on the tactical-operating planning, while the UK approach results not only characterized by a very specific roles sub-division, but it also reflects a particular attention to the strategic planning and, generally, to the design brief editing. In fact, its clarification into technical project requirements is monitored by the specific professionalism of the Design Manager.

#### **4. Conclusion: the crucial phases and the leading roles in structuring and converting the design brief**

As we have already explained in introduction, the preliminary phase of complex transformation plans is a very crucial moment, during which several competences have to analyze uncertainties and risks associated with the project and to define important strategic managements as well as concrete solutions.

The logistic and organizational complexity that characterizes this phase is caused by several operating decisions – often each other linked – that the project team has to take, respecting the laws and the design brief developed by the client.

Critically analyzing the Italian approach and comparing it with the UK one, it is evident the low attention to the design brief: the Italian law, in fact, punctually describes the administrative procedures to follow during the scheduling, planning, construction and control phases, but it doesn't explicitly analyzes the fundamental design brief development and the concept evolution, like, instead, the RIBA Plan of Work does.

In the UK the preliminary phase constitutes a longer and more detailed process than the Italian one, and obviously it implicates a larger investment considering schedules, costs and necessary human resources; in fact, in the UK it is characterized by numerous and not exclusively administrative procedures and by a complex preparation to the construction phase that involve the entire project team. This preliminary planning, carefully oriented both to the buying orders scheduling and to the risks management, consents considerable savings during the construction phase and so a complex optimization of the process of the project in terms of costs, deadlines and quality standards.

In Italy, instead, the preliminary phase often constitutes a sort of “pro-forma”, during which the administrative procedures necessary to assign the contract and to let the works start are prearranged as soon as possible: for this reason there are frequently problematic situations and related delays in deliveries during the construction phase.

Even if the Italian laws and the contract subscribed by the client and the contractor constitute fundamental reference points in the project planning, often they are not sufficient in order to guarantee the client's satisfaction and, consequentially, the complete success of the project.

Analyzing all the factors that contribute to the success of a project it is fundamental do not forget the importance of each role involved and its coordination with the entire project team.

The UK approach in the projects planning is characterized by a very specific sub-division of the competences and by the importance attributed to the coordination role of the Design Manager, strategic and operating reference point during every phases of the project.

The Design Manager, in fact, is expected to actively participate into the project development from its preliminary phase, during which the design brief has to be defined; teaming up first (strategic planning) with the Developer and after (tactical-operating planning) with the Project Manager, his constant presence could guarantee a more probable client's satisfaction. The aspect that this paper wants to underline is about the importance of the Design Manager's role in converting the client's needs into technical project requirements, as well as in monitoring the construction phase and controlling deadlines and planned costs.

The Italian laws do not provide any professionalism with the same competences of the Design Manager: the reference point during the tactical-operating planning is the *Responsabile dei Lavori* (or the *Responsabile Unico del Procedimento* in case of public projects), a very complex role involved during the entire project management with several responsibilities.

So, if on the one hand in Italy it is possible to find a very detailed planning of the *Responsabile dei Lavori* (similar to the Project Manager's activities), on the other hand there are any competences comparable to the Design Manager's ones, like the editing of the design brief. The Design Manager, in Italy rarely included in the project team, represents a key role for the project success, because of he constitutes the connection between the strategic and the tactical-operating planning.

In Italy the presence of a reference point both strategic and operative, like the Design Manager, could be fundamental specially in the context of public projects, where rarely clients and contractors dialogue before the bid award.

The attention through the client's needs and a rational resources and schedules planning and management before the construction phase constitute fundamental conditions for the project success.

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