

South Tyrol



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South Tyrol is a bridge between north and south, a tourist destination, and a thriving business location with a colourful history. The Italian province, which is located just south of the vital Brennero Pass (Brenner), has developed today into one of the wealthiest regions in Europe largely due to its unique autonomous status granting wide-ranging administrative and legislative power.

When Johann Wolfgang von Goethe's travels took him to Italy in 1786, he commented that Bolzano (Bozen)—already an important trading town at that time—was a place “where everyone revolves around the marketplace” and where “there is a gentle mild breeze throughout the land”. Southern Tyrol, which the celebrated poet traversed, was part of the Habsburg Empire at that time. This land has always been a connecting route between northern and southern Europe—and has thus been a perpetual object of great desire for great nations. The Romans and the Franks have left their footprints here, as have the Counts of Tyrol. South Tyrol became part of Italy in the wake of World War I, and has thus been the country's northernmost province since 1919. The Fascists seized power in Italy in 1922 and instituted later in 1939 what was called the Option: either remain in South Tyrol or emigrate to Nazi Germany. The ruthless

A vibrant commercial town: Corso Libertà in Bolzano (1)
A view of Venosta Valley (Vinschgau) (2)

assimilation policy wounded the region and its people deeply, a scar that is still felt today. After World War II, Italy promised South Tyrol self-rule in order to protect and give equal rights to the German-speaking majority. They implemented this policy very poorly, though, resulting in an international dispute that was eventually heard by the United Nations. Since 1972, South Tyrol has had a new autonomy statute that guarantees extensive legislative powers to the minority and is now seen as a model for minority delegations throughout the world. Today, South Tyrol has truly arrived: the province has a thriving economy with virtually full employment. Tourism is booming, well-known international companies have settled here—ranging from Brennero in the north to the Chiusa di Salorno (Salurner Klaus) in the south—and the population's multilingualism is now considered to be a godsend.



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A Wide Range of Special Rights

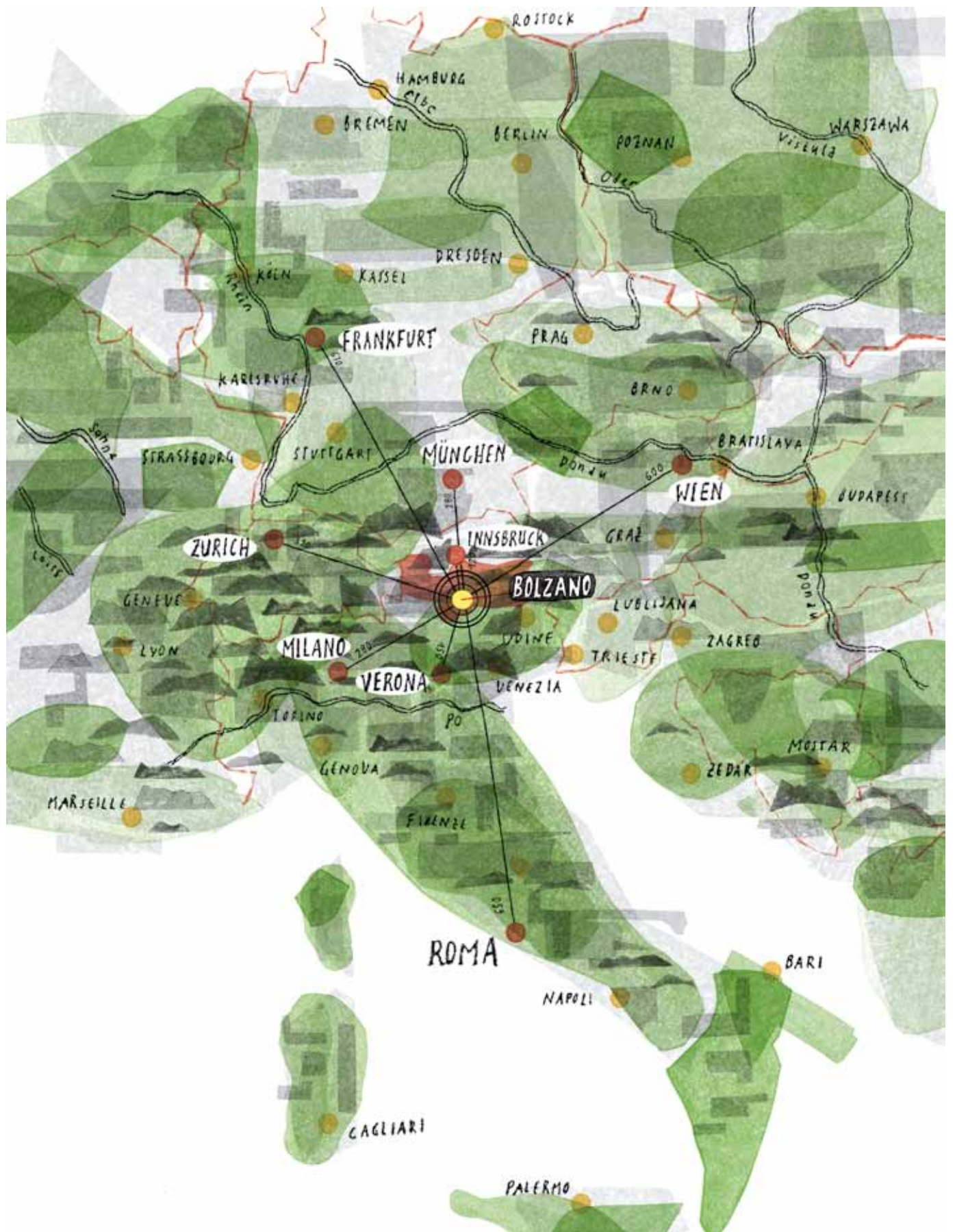
The Italian Constitution protects South Tyrol's autonomous status and gives the province power over a number of aspects of public administration including culture, education, land use, and economic policy. German is an official language in the courts and in public administration—something that is seen as a major achievement. A system of proportional ethnic representation ensures equal rights for the German, Italian and Ladin-speaking populations in job allocation for public offices.

The Project of the Century

Twelve million automobiles, two million trucks, and net loads of up to 50,000 tonnes: this is the burden the Brennero Pass bears over the course of just one year. The Brenner Base Tunnel (BBT) is a controversial, multibillion-dollar construction project designed to shift freight traffic



from road to rails along this critical north-south route. The EU, Austria and Italy are jointly funding the BBT project. When the tunnel is connected to the Innsbruck bypass tunnel, it will be 64 kilometres in length, making it the longest underground railway tunnel in the world. Construction is slated for completion in 2025.





A World Natural Heritage Site South Tyrol is a mountainous region with wildly juxtaposing landscapes: it is extremely steep and barren in some places and lush with a very mild climate in others. The population in this, the largest of Italy's provinces, is concentrated mainly in the main valleys along the Adige (Etsch), Rienza (Rienz) and Isarco (Eisack) Rivers. At an elevation of 3,905 metres, Mount Ortler is the highest peak in South Tyrol. In the east are the celebrated massifs of the Dolomite Mountains, atop which the mountaineering legend Reinhold Messner won his first spurs. UNESCO's World Heritage Committee listed the Dolomites in 2009, citing the range as "a series of unique mountain landscapes of exceptional beauty".

South Tyrol at a Glance

Area:	7,400 sq km
Population:	510,000 inhabitants
Populated Area:	21,096 ha = 2.85%
Population Density:	68 inhabitants / sq km
Capital:	Bolzano (103,135 inhabitants)
Cities with over 20,000 inhabitants:	Merano (Meran), Bressanone (Brixen), and Brunico (Bruneck)
Number of Municipalities:	116
Language Group Affiliation:	
Percentage of Foreigners:	8%
Life Expectancy for Men:	79.7 years (Italy: 78.9)
Life Expectancy for Women:	85.3 years (Italy: 84.1)
Major Political Parties:	Südtiroler Volkspartei (48.1%), Die Freiheitlichen (14.3%), Popolo della Libertà (8.3%)
Province Governor:	Luis Durnwalder (since 1989)
Religious Denomination:	Roman Catholic majority
International Dialling Code:	0039
Main Arteries:	Brenner Autobahn: A22 Trains: Munich-Bolzano-Verona Airports: Bolzano, Innsbruck, Verona
	→ www.provinz.bz.it → www.suedtirol.info → www.bls.info

Ötzi – the Iceman (3)

The most famous South Tyrolean these days is more than 5,000 years old and lived during the Stone Age. At that time, copper was fundamentally changing man's way of life, hunting was absolutely vital to survival, and there were already trails crossing the Brennero Pass. The discovery of Ötzi the Iceman in 1991 sent shock waves rippling through the archaeological world. Ötzi is one of the world's oldest mummies—but it is his natural mummification that makes him of such critical value to science. His body tissue is still elastic, and the ice even preserved his clothing and equipment. The media named the man, who probably fell victim to a murder, after the site of his discovery on the South Tyrolean side of the Ötztal Alps. Since that time, thousands of people flock to the Archaeological Museum in Bolzano every year to view the mummy. In addition, the find sparked the founding of the world's first institute for mummy research in South Tyrol's capital city.



3

Economy

Services, artisans, industry and agriculture: South Tyrol's economy is built on many different pillars. The province's businesses, which are mostly small to mid-sized, generate the highest gross domestic product per capita in Italy.

South Tyrol's economy is the best in Italy. That isn't hyperbole. Nowhere in Italy is there a higher labour force participation rate, lower unemployment, or a higher GDP per capita: euro 34,421 in 2009. A vast number of small and midsize businesses, many of which are family run, generate this gross domestic product. One reason for South Tyrol's striking economic success and booming job market is its balanced economic structure: agriculture, artisans, industry, commerce, hospitality, services, and public administration all maintain a rough balance. It's a good mix that has proven to be very successful, even in times of crisis—when things get particularly difficult for the sectors individually. Other success factors include: a solid education system; the steadily increasing qualification level found in the general population; the province's system of dual training for apprentices, which is based on German and Austrian models; and the presence of the Free University of Bolzano and the European research institute EURAC. For some time, South Tyrol's politicians have been zeroing in hard on the sector of research and development. A technology park will provide additional momentum for this branch in the future. The coalescence of all these factors—together with sound measures for economic development and Italy's lowest taxes—has made South Tyrol the most investor-friendly region in the country, according to a study performed by the Italian artisans' association Confartigianato.

South Tyrolean Glass Blower (1)

Traditional crafts are one of the pillars of the South Tyrolean economy.

The Province Vocational School for Industry and Handicrafts in Bolzano (2)

Höller & Klotzner Architects; winners of the 2008 Dedalo Minosse Architecture Prize.



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Artisans

Artisans in South Tyrol generally function on a small scale. Traditional craftsmen such as wood carvers and quill embroiderers work side-by-side with those engaging in innovative trades such as climate-house experts and media designers. Approximately 13,000 artisanal companies are currently operating in about eighty different trades. With almost 44,000 employees, artisanry is number one in the private sector: it generates around 2.4 billion euro and represents 15.4 percent of the value created.

Industry

South Tyrol's approximately 500 industrial companies employ a total of 33,000 people and range from manufacturers of niche products to suppliers for the automotive industry and from steelmakers to producers of high-purity silicon. Industry represents a 15.4 percent share of the GDP, the highest of all sectors. The value added per worker is 59,600 euro, and 90 percent of sales are generated outside of South Tyrol.

Long-Standing and Family Businesses

Tradition is still very much alive and well in South Tyrol: the large number of successful family businesses in the province is evidence of this fact. These companies produce quality products for the domestic and international market in keeping with a common motto: "Committed to tradition, with the future in mind". The name Loacker has been synonymous with wafers and sweets since 1925; Daunenstep has provided for cosy warmth in bed for more than a century; *Speck* cured ham and sausages from Senfter have a tradition dating back 150 years and inspire the Americans and the Chinese even today; and Thun's beloved angels have fans all over the world.



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Education

South Tyrol's dual apprenticeship training system comprises 120 occupations in every sector of the economy. Apprentices hailing from the province regularly win medals at the World Skills Competition. South Tyrol's PISA scores are on par with those of the other European regions that serve as role models in many different fields. About 30 percent of South Tyrol's students enrol in Italian universities and around 40 percent enrol in Austrian universities; approximately



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20 percent attend the trilingual Free University of Bolzano. In addition to multilingualism, South Tyroleans generally bring a great deal of intercultural expertise into the workplace. Continuing education is likewise very well developed: over 270,000 adults participate in more than 16,000 training courses every year.

Research

The Free University of Bolzano offers courses conducted in German, Italian or English in five different departments: economics; computer science; engineering and natural sciences; education sciences;

design and the arts. The university comprises three different locations: Bolzano (Bozen), Bressanone (Brixen) and Brunico (Bruneck). About 750 professors, lecturers and associates serve the university's approximately 3,500 students.

The European Academy of Bolzano (EURAC) is a post-graduate research and training institute. EURAC's approximately 130 researchers, who hail from ten different countries, conduct basic interdisciplinary research within eleven different institutes.

Research Areas:

- Minorities and Autonomies
- Management and Corporate Culture
- Sustainable Development
- Applied Linguistics
- Life Sciences

EURAC works in close cooperation with industrial partners and other international research institutions.

The Fraunhofer-Gesellschaft has had an Italian subsidiary headquartered in Bolzano since 2009. The Fraunhofer Innovation Engineering Center (IEC) in Bolzano helps small and medium-sized businesses in the area of applied research.



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Innovation A new technology park in Bolzano's industrial zone, which could grow to as large as twelve hectares, is going to hit South Tyrol's economy with a wave of innovation: the universities, public and private research facilities, and companies housed in the park are expected to catalyse know-how in key sectors such as renewable energy, sustainable mobility, and food technology. TIS Innovation Park operates this innovation area. Business Location Südtirol – Alto Adige (BLS), the government agency charged with promoting South Tyrol as a business location and helping domestic and international companies settle into the province, is responsible for marketing the park. TIS in Bolzano is an incubator for start-up companies like 3D Pixel, a company that has developed—in conjunction with the forensic laboratory of the *carabinieri* (the national gendarmerie of Italy) in Parma—an innovative 360-degree camera system for documenting crime scenes. In addition, TIS advises companies, connects industry and science by building networks for cross-sector projects, and helps with patent strategies and analysis of materials.

German-Italian Business Forum

The inaugural event of the German-Italian Business Forum was a two-day summit meeting of the German-Italian business elite in Bolzano at the end of October 2011. The discussion centred around the economic crisis and how to strengthen international cooperation between the two countries: Emma Marcegaglia, president of Italy's largest employers' association, Confindustria; Franco Frattini, Italy's foreign minister; and Hans-Peter Keitel, chairman of the Federation of German Industries (BDI) led the summit. The German-Italian Business Forum plans to establish itself permanently and hold meetings every year in South Tyrol's capital.

Library of the Free University of Bolzano (3)

The former Alumix building in Bolzano (4)

In 2008, the European art biennale, Manifesta 7, was held in the Alumix building. In the future, it will house the technology park.



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Business Etiquette The Dos and Don'ts of Business in South Tyrol

- ❶ A Slippery Slope: never refer to a German-speaking South Tyrolean as “Italian”. Identity in South Tyrol is a very delicate issue—and gets political very quickly.
- ❷ Talk About It First: your business partners are generally extremely reliable...with a couple of centuries of cunning behind them.
- ❸ No Abstainers: A morning's deal will always be toasted with a glass of wine—take at least one sip.

Headquarters

The multilingualism of the public administration, potential business partners, and business-related service providers all make it easier for entrepreneurs who speak German, Italian or English to set up shop



in South Tyrol. German is an official language of the province—right alongside Italian. The paperwork necessary to form a business and the company's financial statements may be filed in German, and the work force is mostly bilingual or multilingual. South Tyrol's function as a bridge between German-speaking Europe and Italy and its strategic location along the Berlin-Munich-Verona axis have led to large international companies establishing

their Italian headquarters here. Some examples of these companies include Würth, Doppelmayr, Hoppe, GKN, Bayernland, Miele, Monier, MEMC, Pompadour, Röchling, Schenk, Röfix, Fendt Italiana, Exquisa, Julius Meinel, M-Preis, Wenatex, Achard, Pfanner, Cea, Warsteiner, Nils, Develey, Makino, Velta, Loewe and Vetter.

Taxation and Finances

A healthy economy is a prerequisite for sustainable growth and economic success. All of the major rating agencies regularly give South Tyrol good credit ratings. With a GDP of nearly 17.3 billion euro, South Tyrol ranks among the top 25 regions in Europe. Corporate tax (IRES) is only 27.5 percent. Italy's lowest value-added tax (IRAP, 2.98 percent; in some cases 2.5 percent) means that South Tyrolean companies carry the lowest tax burden in Italy. This translates to annual tax relief of around 65 million euro. South Tyrol supports its businesses with direct grants

amounting to over 90 million euro annually. Between 10 and 40 percent of expenditure on research and development is tax deductible.

Labour Market

South Tyrol has an unemployment rate of 2.7 percent, which is the lowest in the EU and represents de facto full employment. Skilled employees in engineering are very much in demand, as are those with other technology-based training. The employment rate is a healthy 71 percent, well above the EU average. About 91 percent of South Tyrol's workers describe themselves as “fairly satisfied” or “very satisfied”, and the average workweek is nearly 42 hours. The number of self-employed and freelancers is above average, at nearly 28 percent.

The EURAC European Academy in Bolzano (5)

The think-tank carries out research and maintains ongoing contact with businesses for a competitive Europe.

Headquarters of Finstral, a window and door manufacturer in Unterinn (Renon) (6)



From Small Business to Global Player

Dr. Schär is a world market leader in gluten-free nutrition: the company produces 300 gluten-free products ranging from bread to fish fingers under the labels DS, Schär, Glutafin, Glutano, and TruFree. The company's latest numbers showed 130 million euro in sales and a profit of 11 million euro. Ulrich Ladurner (pictured), formerly a pharmacist in Merano, founded the company. The entrepreneur also sets standards in quality tourism with his five-star Vigilius Mountain Resort. Ladurner is clearly one of the giants of South Tyrol's economy, yet has kept his feet firmly on the ground. He works hard and only rarely ventures into the lime-light. He is now conquering the east with his Dr. Schär Company.

Market Leader Made in South Tyrol

Durst Phototechnik of Bressanone, which was founded in 1929, is the market leader in innovative system solutions for the reproduction of images. Durst specialises in industrial inkjet printers for decorative printing on a variety of different surfaces and with large formats.

Health Robotics builds medical robots that automatically mix cocktails of chemotherapy drugs. Founded in 2006, the

company has successfully filled a gap in the market. The world market leader invests about a quarter of its sales into R & D. Microtec, based in Bressanone, is a global technology leader for measuring and optimising the value of wood, thereby increasing the productivity of a sawmill. Zirkozahn, based near Brunico, is a driving force for innovation in zircon milling systems for the production of customised teeth, and now has 15 branch offices worldwide.

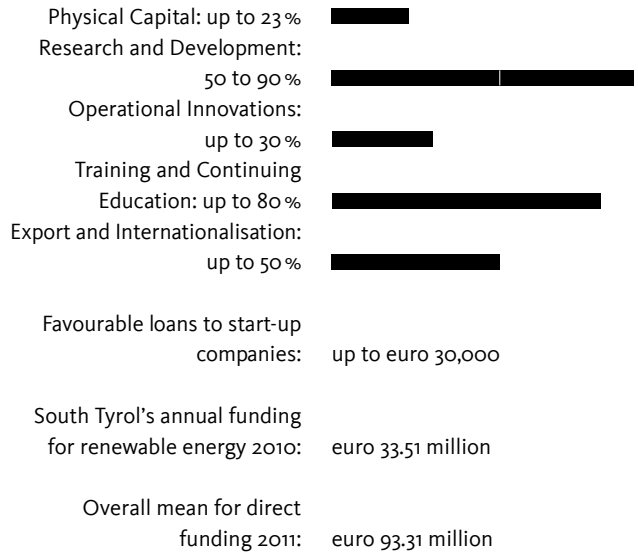


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International Success Stories

Some of South Tyrol's other triumphs on the international market include Duka, a manufacturer of shower enclosures; Intercable, a manufacturer of plastic; Finstral, which makes windows and doors; Rubner, which specialises in wood construction; Schweitzer Project, a developer of premium equipment systems; Ivoclar Vivadent, working in the dental sector; and Maico, a company based in Val Passiria (Passeiertal) that supplies technical components of windows and doors. Internationally successful companies include Autotest (car accessories), Seppi M (shredders), Atzwanger (environmental and housing technologies), and Microgate, the global leader in professional chronometry.

Funding in South Tyrol

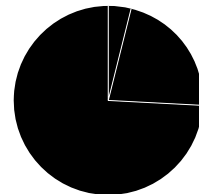


South Tyrol's Economy in Figures

Gross domestic product or GDP (nominal): euro 17.27 billion (2009)
 GDP per capita (nominal): euro 34,421 (2009)
 Business investment, as share of GDP: 23.4 % (2007)

GDP by economic sector (2009):

Agriculture: 4.1 %
 Industry (including handicrafts): 21.9 %
 Services (including tourism): 74 %



Bolzano's Commercial Area

The success story of South Tyrol's economy began after World War II. The mid-1950s brought what was known as *il miracolo economico*, or the Italian "economic miracle", in which there was an extended period of economic growth. By 1971, industrial companies had risen to 46 percent of businesses and industrial workers to 35 percent of all employees. Thereafter, the industrial sector experienced a gradual decline. The developing service sector and the tourist boom helped to absorb this loss. Today, thriving industry with many successful companies is another important factor in South Tyrol's economic strength.

Energy

South Tyrol is Italy's Green Region—a model province in the renewable energy sector and well on its way towards becoming energy self-sufficient.

South Tyrol already meets more than half of its energy needs through renewable energy. By 2020, the province will meet three quarters of its electricity and heating demand with renewable energy sources. The government is committed to being a driving



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force, and financial support is growing: 465 South Tyrolean companies and a wide range of research projects and institutions are already working in the green sector. Many Italian provinces look to South Tyrol as a model not only because of its government's commitment but also because the Klima-Haus agency operating in the province sets national standards for energy-efficient building.

It's no wonder that an increasing number of companies, including foreign businesses, are using the border region as a springboard into the Italian energy market. Although Italy is an international leader in the fields of mechanics and electronics, the country is still dependent on foreign know-how when it comes to the production of renewable energy. The German company Ralos, which has a branch in Merano, has supplied the Italian market with photovoltaic systems for years. The German energy giant RWE has been working with Fri El Green Power, which operates a vast number of wind turbines and wind parks as well as biogas and biomass plants.

The Juval Fruitgrowers' Cooperative in the Venosta Valley (1)

The photovoltaic specialist Ralos Northern Italy installed panels on the facade and roof resulting in an output totalling 843 kWp.

A wind power station made by Leitwind in Puglia (2)

Renewable Energy in South Tyrol

930	hydropower plants
66	biomass district heating plants
	Thousands of small pellet-fired and wood-chip heating systems
30	biogas plants
318	private geothermal plants
7	wind turbines
5,064	photovoltaic systems
18,120	solar thermal systems

Government Funding

The Province of South Tyrol covers up to 30 percent of costs incurred for energy-efficient remediation measures. The following categories are eligible for funding:

- Thermal insulation of roofs and walls
- Replacement of doors and windows
- Installation of doors and windows
- Installation of solar thermal systems
- Installation of solar heating and cooling
- Installation of an automatic heating system equipped for solid biomass
- Mounting a wood-burning gasification boiler
- Installation of a geothermal heating pump

Green Businesses

In addition to the wind power and biogas specialist company Fri El Green Power, there are a number of other South Tyrolean businesses that are leaders on the national and international energy markets. Leitwind, a subsidiary of Leitner Technologies, has installed over 100 gearless wind turbines to date worldwide. The company from Vipiteno (Sterzing), with annual sales of euro 137 million (2010), has attained distinction for its innovativeness and research. MEMC manufactures silicon, the raw material for solar panels. The South Tyrolean branch of the American giant is also benefiting from the attractive solar market: the parent company has invested 190 million euro to expand the plant in Merano.



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As an alternative, a 55 percent national tax deduction may be claimed for the renovation of old buildings. The subsidy and the deduction may not be taken together.

Research Support

- EURAC Institute for Renewable Energy helps companies optimise innovative technologies. The think-tank has been conducting trials over the last year at Bolzano Airport, where there is photovoltaic testing facility with 24 different types of modules. There is also a similar project going on not far from Venice. Together with a South Tyrolean company called Elpo, EURAC is testing different solar panels situated on a large rooftop taking into account the effect of various methods of positioning, orientation and climatic conditions.
→ www.eurac.edu

- The energy and environment area of TIS Innovation Park supports companies working in the sectors of renewable energy and energy efficiency through feasibility studies and technology transfer, and serves in an advisory capacity for innovative projects. Feasibility studies for the thermal processing of bran are also available.
→ www.tis.bz.it

- The Free University of Bolzano offers the first KlimaHaus master's degree program. Points of focus include energy-efficient construction and sources of renewable energy.
→ www.unibz.it

Energy-Efficient Construction

South Tyrol sets standards throughout Italy and beyond with its KlimaHaus initiative. KlimaHaus introduced minimum standards for energy consumption of buildings and a way to perform checks. Several Italian regions have also followed suit. Classification of buildings into category A, B or C—a similar principle to that of household appliances—made the energy efficiency of buildings easier for the consumer to understand, as well. To date, there have been more than 2,800 new buildings and about 2,300 refurbished buildings certified in South Tyrol. This has brought in additional income amounting to about 64 million euro per year. The future potential is huge, especially in Italy, where energy prices are among the highest in Europe. Attractive tax incentives for renovations that improve energy efficiency also lend a helping hand. The energy certification of new buildings has been required since 2009.

The Klimahouse and Klimaenergy Trade Fairs in Bolzano

- Klimahouse is the leading trade fair for energy-efficient and sustainable construction in Italy. This year, Klimahouse attracted 40,000 visitors to Bolzano, with over 80 percent of attendees coming from other Italian provinces. The trade fair's success is no mystery: according to an extrapolation performed by the independent research company CRESME, Italy can continue to expect massive investments in this sector. There are 173 million square metres of exterior walls and 600 million square metres of

roof and floor surfaces alone that must undergo energy-efficient renovations by the year 2020.

- Klimaenergy is a trade fair focusing on renewable energy for commercial and public use. In 2010, there were 175 exhibitors and 5,000 trade visitors that came from 71 different Italian provinces and six countries—mostly German speaking—to network in the capital city. Since 2011, the exhibition has enjoyed even more popularity, thanks to Klimamobility, a platform for sustainable mobility.



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Enertour

Enertour is a project of the TIS Innovation Park, which promotes innovative solutions in the renewable energy sector. Designers and carriers direct the use of renewable energies through energy-efficient equipment and buildings in all of South Tyrol and shed light on the economic and technical benefits of technology. Since 2007, Enertour has been part of the Sustainable Energy Europe campaign, which the Italian Ministry for Environment coordinates at a national level.

Kindergarten in Terento (Terenten) (3)

Architecturally sophisticated and energy-efficient construction (KlimaHaus A) from feld72 architectural studio



Visionary

Alois Lageder (pictured) produces world-class wines and is president of the Ökoinstitut in Bolzano. The winemaker has lived and worked close to nature and uses biodynamic farming principles. Today, his estate in the Bassa Atesina (Unterland) has a new building that sits side-by-side with the historical structures: a low-energy house built out of wood and stone that meets green building standards. The photovoltaic panels on the roof meet 60 percent of the winery's day-to-day electricity needs. A bare wall of stone in the cellar keeps the fermenting area cool throughout the whole year. Lageder strives to bring nature into his interior spaces, and seeks dialogue with art. Artists from around the world have found themselves inspired by his philosophy right on the spot: resulting works adorn the estate. Lageder was also president of the Museion, the museum of modern and contemporary art in South Tyrol's capital, for a number of years.

A CO₂ Neutral Holiday

Dobbiaco (Toblach) (pictured) in Val Pusteria is known mostly as a hot winter sports destination, but the village is one of very few energy self-sufficient municipalities in Italy. The local tourist bureau is now promoting a special environmental protection project: People who come to Dobbiaco on holiday can request a calculation of the carbon footprint of their trip to the town, their stay, and their trip home. The tourist bureau assumes the cost of balancing out the CO₂ emissions of their holiday, which it determines with a special calculator. The local district heating plant then makes enough clean energy to neutralise those emissions.



Solar Recharge

CO₂-free mobility is still a dream for the future, but large energy suppliers can already smell a billion-euro business. A South Tyrolean company, E-Move, installed a prototype solar charging station in Bolzano and Brunico that is powered exclusively by solar energy. Drivers of electric vehicles can connect via a standard AC outlet into the prototype, which consumes a total power of 1.761 kWp—about half that of a single-family household. The company wants to build a small network of solar energy charging stations in Bolzano.



Champions League Winners Brunico (pictured) is one of only twenty municipalities in Italy that meet energy demand with 100 percent renewable energy sources, and even won the 2011 RES Champions League for renewable energy. The capital of South Tyrol's Val Pusteria (Puster-tal) has won this international competition in the category of small cities with populations between 5,000 and 20,000 inhabitants—against competitors all across Europe. The deciding factor was the most environmentally friendly mix of energy use: three small hydroelectric power plants, a district heating system, solar and photovoltaic panels, and a biogas plant provide the town's residents with green energy. The municipality plans to invest even more into geothermal resources in the future. Of the 20 energy self-sufficient municipalities in Italy, 14 are located in South Tyrol.

A Shift in Energy Usage

In keeping with the European Union's 20-20-20 targets, Italy has committed to meeting 17 percent of its energy needs with renewable sources by the year 2020. According to ISTAT, the national statistics bureau, the percentage as of 2009 was only 10.7 percent. The government has since responded and adopted attractive incentives. Conditions in Italy are ideal to accomplish this: the country has more than enough sunny days for operating photovoltaic systems and many kilometres of coastline for wind power.

Potential Under the Earth

Italy has neglected geothermal energy production in the past. This was clearly a mistake because Italy is one of the countries with the most potential for geothermal energy in Europe—second only to Iceland. The largest plants for district heating and electricity production are located in the regions of Tuscany and Veneto.



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Photovoltaic plant at Bolzano Airport (4)

A Boom in Photovoltaics

Possibilities for expanding hydropower in Italy are almost depleted. It will thus be the newer technologies like wind and solar power that will allow the country to meet Europe’s climate goals and reduce dependence on imported energy. The photovoltaic industry is booming: new plants installed in 2010 produced a total output of 1.85 gigawatts, an increase of 160 percent in comparison with 2009. A total output of 8 gigawatts is expected in 2011. The Conto Energia policy, a system of feed-in tariffs for putting solar energy into the grid, is partially responsible for this upswing. The feed-in tariff rates are much higher in Italy compared to Germany and other European countries. Admittedly, these may be moderately reduced in the coming years, as has happened abroad, but according to a study by Confindustria, the Italian employers’ federation, photovoltaic technology remains profitable. Depending on the size of the plants, return on investment will range between 18 and 36 percent, much higher than in neighbouring Germany. A study performed by the international consultancy firm Ernst & Young confirmed the market attractiveness and investment potential of renewable energy in Italy: in 2011, the country was rated in fifth place worldwide and in second place in Europe.

Alternative Sources of Energy

Wind power, biomass, and biogas are predicted to have potential for energy production similar to that of solar power. South Tyrol subsidises these alternative energy sources either through what are called Green Certificates or through Comprehensive Tariffs, depending on the type and size of the plant.

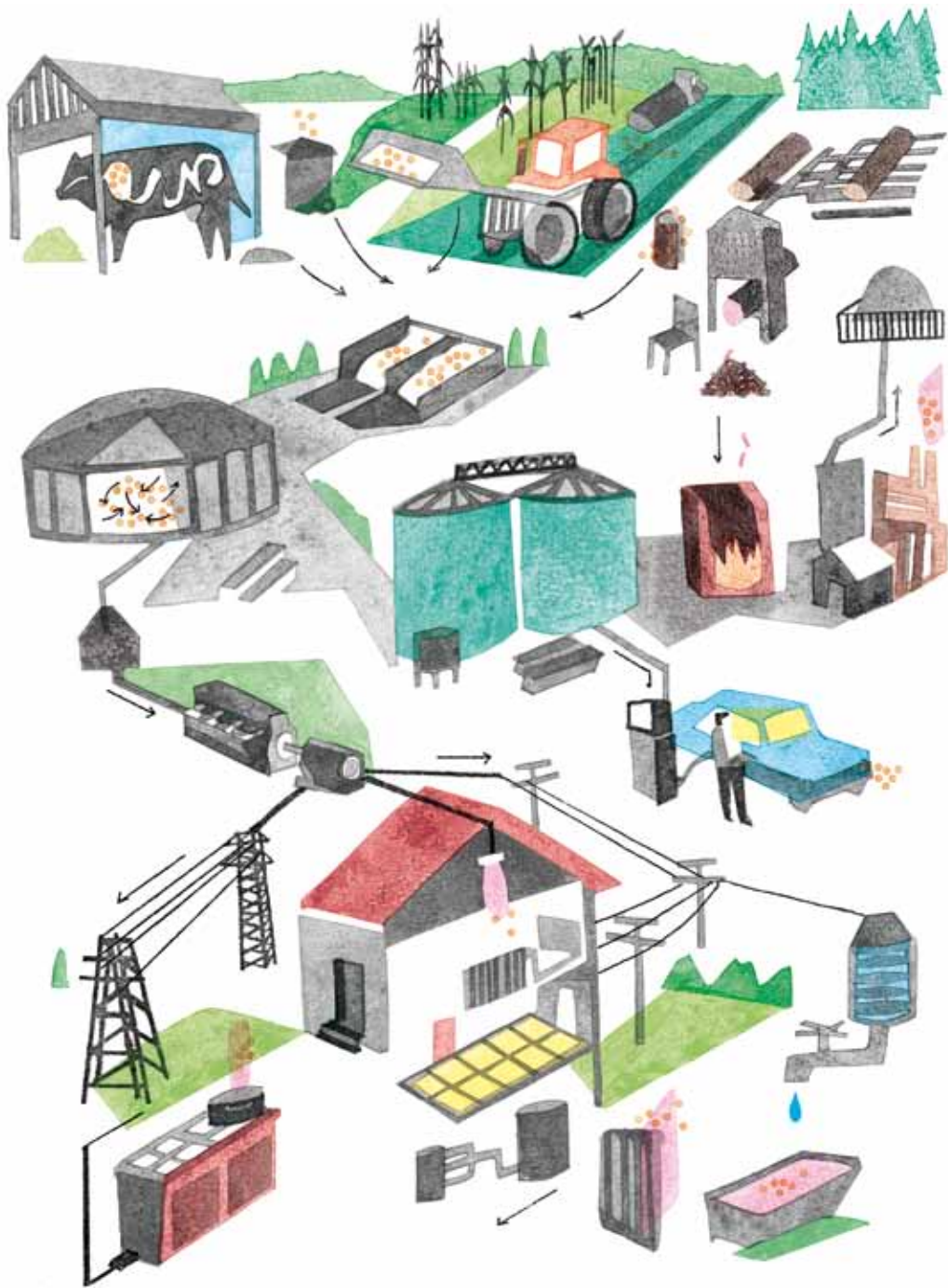
- Green Certificates: These are used mainly with larger scale facilities and are traded on a special stock exchange. The number of certificates is calculated based on the effective rate of flow and a specific coefficient, which varies depending on the energy carrier. The actual remuneration per kWh is derived from this base.
- Comprehensive Tariffs: These are used mainly with smaller scale facilities and—like Green Certificates—have a term of 15 years. This system provides for a fixed payment for biomass, biogas, wind power, and geothermal energy.

Photovoltaics

Annual newly installed total output of the Italian photovoltaic market from 2006 to 2010:

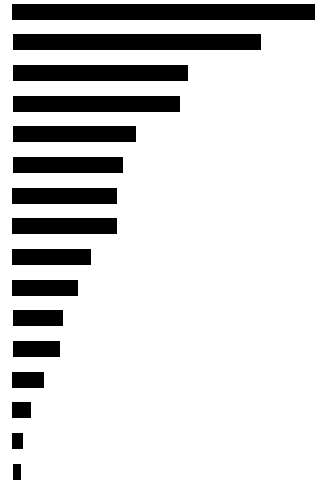


Government objectives for 2020 pursuant to the government’s 2007 position paper: 9,500 MW
 Already installed capacity by 7 December 2011: 11,700 MW!



Biomass in Europe

Proportion of biomass in Europe's total electricity production (cumulative data for biomass, biodegradable waste, biogas, and liquid biofuels)



- Finland 11.6%
 - Denmark 9.5%
 - Austria 6.7%
 - Sweden 6.4%
 - Netherlands 4.7%
 - Germany 4.2%
 - Portugal 4%
 - Belgium 4%
 - EU-15 3%
 - UK 2.5%
 - Italy 1.9%
 - Luxembourg 1.8%
 - Spain 1.2%
 - France 0.7%
 - Ireland 0.4%
 - Greece 0.3%
- (Source: GSE)

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Energy from Biomass (5)

Electricity, heat and fuel are obtained from agricultural and forest residues such as wood, charcoal, and manure or from crops like corn and rapeseed. As can be seen on the left side of the illustration, liquid manure and crops end up in biogas plants, which convert biomass to biogas through a process of fermentation; the biomass, in turn, is used to

generate electricity and heat (hot water here). Vegetable oil is produced from agricultural crops such as rapeseed and converted to biodiesel with the help of methanol, in a process known as transesterification, represented by the two containers in the centre of the illustration. Solid biomass, such as the wood in this example, is burned in biomass power stations and used to meet electricity and heating needs.

Alpine Technology

Amidst 3,000-metre-plus peaks and the most modern of ski carousels, technologies arise in South Tyrol that make modern winter sports as we know them possible.

From lifts to artificial snow, from functional clothing to timing devices: because of international market leaders such as Leitner, TechnoAlpin and Salewa, South Tyrol has developed into one of the major global sites for mountain-related business. Alpine technology, which is a key sector for the province, now comprises more than eighty businesses, including local companies as well as those



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that have a branch in South Tyrol, ranging from global players to innovative niche players. A competency centre for Alpine technology, which is under the umbrella of the TIS Innovation Park service agency, strengthens this accumulation of know-how. Two major venues for the international ski industry also play an important role—both are trade fairs held in Bolzano: Alpitec, for mountain and winter technologies, and Prowinter, for winter sports rentals and services.

Technical Snowmaking (1)

TechnoAlpin supplies 42 countries with snow guns, supply lines, and control systems.

The Beast (2)

A snow groomer built by Prinoth (Leitner Technologies)

The MiniMetro by Leitner Technologies (3)

In 2008, the world's first minimetro cable car, built by Leitner Technologies, began operating in Perugia.



2

Leitner Technologies

A market presence that includes the brands Leitner Ropeways (cableways), Prinoth (groomers), MiniMetro (cable-drawn trams), Demac and Lenko (snow machines) makes this South Tyrolean business headquartered in Vipiteno one of the international stars in the Alpine technology sector. A sales volume of 700 million euro, a total of 2,781 employees worldwide, 70 subsidiaries, 97 points of sale and service, and eight production facilities all bear witness to this fact. In 2010 alone, the company invested 19 million euro into research and development.

TechnoAlpin

In the beginning, there were two technical directors of a South Tyrolean ski resort who fashioned a snow cannon out of commercially available materials from a hay blower. Twenty years after its founding in 1990, TechnoAlpin is the world leader in artificial snow. TechnoAlpin, which is headquartered in Bolzano, is the “go to” company when it comes to snow guns, supply pipe systems, and control systems for more than a thousand customers in 42 countries—including numerous World Cup and European Cup destinations. Around 160 of the company's 260 employees worldwide work in Bolzano. About two thirds of its sales volume of more than 100 million euro is earned abroad.



3



4

Salewa Headquarters (4)

The new Salewa headquarters in Bolzano, which is also the group's European headquarters, is the work of renowned Italian architectural offices Cino Zucchi and Park Associati. The architecture is expressive and contemporary with a pointed reference to the company's main focus of development: mountain sports. The new corporate building, which was presented at the 12th Architecture Biennale in Venice in 2010 and opened in October 2011, is more than a work space: the Salewa Cube climbing gym and the Bivac Bistro are both open to the public.

Salewa

Whether you are talking about functional clothing, tents, backpacks, or crampons, you can be sure that products made by this popular mountain sports outfitter have been developed in close cooperation with research institutes and tested by well-known mountaineers. Bolzano's Oberalp Group has owned the brand, which was founded in Munich, for more than 20 years. Salewa recently reported sales of 178 million euro, together with its sister-brands Dynafit and Silvretta. The company's main market is Europe, but the number of partner stores is growing rapidly in North America and Asia. In 2010, the company emphasised Bolzano's role as its European base by building an 18,000-square-metre head-

quarters—complete with state-of-the-art architecture and the largest indoor climbing centre in Italy.

Reusch

This German producer of high quality winter sports and goalkeeper gloves is the official supplier for successful international ski federations and top goalkeepers. Reusch's production of winter gloves with smart heating technology is clear evidence that the company is on the cutting edge technologically. Reusch moved its international distribution business from Valencia to Bolzano in 2009. The reason? Better integration into the Alpine technology sector and proximity to key target markets.

Doppelmayr Italia

The Italian branch of the Austrian world market leader Doppelmayr arose out of the 2001 merger of three companies that manufacture cable cars. The company does production, sales, and research and development in the South Tyrolean municipality of Lana. In 2011, Doppelmayr Italia received its biggest contract to date, as part of a consortium: the construction of a cable car up Mont Blanc.



5

Solutions to Gridlock

South Tyrol's leading cable car companies have also been conquering the urban space for quite some time. In the Californian city of Oakland, Doppelmayr is building a new railway that runs on rails, yet is pulled by cables. It connects the city airport with Coliseum Train



6

Station and will be completed in 2014. In Venice, a cable-hauled Doppelmayr railway transports up to 3,000 passengers per hour between Tronchetto Island and Piazzale Roma. Leitner Technologies is also hard at work: the company has built a cable car in Perugia that stops at seven stations every few minutes over a distance of 3.5 kilometres.

Visionary Clusters

There is also a competence centre for Alpine technology under the umbrella of South Tyrol's TIS Innovation Park service agency. The goal is to offer turnkey winter sports centres and more innovative, higher-grade solutions with South Tyrolean know-how. In addition to the Alpine technology cluster, there are clusters in the fields of wood and technology, construction and civil defence, and Alpine safety.



Mountain Emergency Medicine The EURAC European Academy has been home to the world's first Institute for Mountain Emergency Medicine since 2009. The facility's tasks include the promotion, coordination and implementation of scientific projects, their publication in medical journals, and the organisation of conferences and workshops. The institute has set a goal of improving the rescue and treatment of accident victims—especially in high-mountain areas where emergency medicine has its own protocols. The research focuses on topics like cold injuries or the logging and treatment of injuries and illnesses in difficult terrain for epidemiological purposes.

A Multi-Million-Euro Contract for Doppelmayr (5)

With a grand total of 265 million euro being paid for the construction and operation of the new light rail in the U.S. city of Oakland, this is the largest contract in the history of the Doppelmayr group. The transportation system in California runs over a distance of 5.1 km and carries nearly 1,500 people per hour in each direction. The city railway connects Oakland International Airport and Oakland Coliseum Station, a transport hub of the city, reaching a maximum speed of 50 km/h. Completion and commissioning are slated for 2014.

Aerial Cableways (6)

Doppelmayr is the global market leader in the production of cableways.

The Community

South Tyrolean society is multifaceted, with Tyrolean and Italian influences. The people are multilingual, the education system is ambitious, and the wealth is dignified.

As soon as you journey across the border, whether coming from the north or the south, you'll see that all the signs are bilingual. German and Italian are the official languages of South Tyrol, but there is one more language in use here: Ladin makes three. These language groups live together here in

Italy's northernmost province: each group cultivates its own culture and each enjoys the advantages of the respective "other world" as people go about their daily lives. Italian and Tyrolean flavours influence the cuisine just about equally. Both groups mutually enjoy music, film and theatre. The local language variants make use of loan words and take on each other's respective attitudes.

This has resulted in a South Tyrolean Italian and a South Tyrolean German. Both display a young South Tyrolean attitude towards life, which walks a line—always conscious of tradition and ever ambitious—between north and south, between the German-speaking countries and Italy, and increasingly far beyond.

Museion Café, Bolzano (1)

Free University of Bolzano, Bressanone Branch (2)

Vinschgerbahn Railway (3)

This train line runs from Merano to Malles (Mals) and back.

Cities, the Province, and Dialects

While the German-speaking population lives scattered all over the province, the Italian population lives mainly in the cities and municipalities in the southern part of South Tyrol.



1

Members of the Ladin ethnic group are found primarily in Val Gardena (Grödentel) and Val Badia (Gadertal). The province itself is divided into eight administrative districts, which vary according to geography. The landscape of Val Pusteria (Pustertal) to the east is lushly verdant wooded terrain through which a steady stream of Alpine tourists flows the whole year round. Orchards and vineyards line the Oltradige-Bassa Atesina (Unterland-Überetsch) to the south. To the west lies the dry and sunny Val Venosta (Vinschgau), through which one reaches the Passo Resia (Reschenpass) that leads to Austria. The dialects spoken in the valleys are clearly distinguishable from one another. If you understand a little German, you may be able to hear that South Tyrolean dialect sounds slangy, with a very strong southern German accent.

Quality of Life

Il Sole 24 Ore, Italy's most important financial newspaper, ranks South Tyrol year after year as Italy's most liveable town. In 2010, South Tyrol ranked number one again, with the highest scores in the sectors of employment and the economy, just as in the previous year. Another of South Tyrol's strengths is its low crime rate. ISTAT, Italy's statistics institute, rates South Tyrol as the safest province in Italy based on perceived safety. Most people in South Tyrol feel "very safe" on the street. In terms of satisfaction with the quality of public administration, the province ranks likewise in first place. Italy's highest incomes ensure households in South Tyrol strong purchasing power.

Education

The mother tongue is usually the language of instruction in South Tyrol; it does occur, though, that parents send children to school in the other language group. English is on the curriculum as early as elementary school, together with the two official languages: German and Italian. The province has also built its own university in service of higher education.



2

South Tyrol, which lived almost exclusively on agriculture as recently as a century ago, has spawned solid craft-based industries. Since early on, vocational training has been oriented towards the model of the German-speaking countries, thus ensuring that the apprenticeship system produces good craftsmen in comparison with the rest of the world.



3

Transportation and Energy Supply

As part of South Tyrol's autonomy package, schools and roads that were previously the responsibility of the Italian state came under the control of the province. Public transport now has attractive and modern equipment like the trains on the Venosta and Pusteria Lines and the cable car that goes up to the Renon (Ritten) Plateau. Public corporations are responsible for the public power supply: these include SEL (Società elettrica altoatesina/Südtiroler Energiegesellschaft), which belongs jointly to the province and a few municipalities, as well as the Azienda Energetica (Etschwerke), which serves Bolzano and Merano. The Brenner Autobahn leading to Modena, which is run by a company called Autostrada del Brennero (Brennerautobahn) and in which all provinces it runs through have an interest, is one of Europe's best-equipped highways.

Population Growth

In some of South Tyrol's valleys, the birth rate is 11.4 per 1,000 inhabitants, which is above the EU average. At 9.1, the birth rate in the province capital, however, is below the European average. South Tyrol's population is still growing, though. The main factors responsible for this are longer life expectancy and immigration. Citizens from non-EU countries have discovered the other face of Italy, especially since 2002. They take on low-skill work—regardless of their qualifications—raise families, and help regenerate the population. Immigrants now make up about eight percent of the population.

Quintessential South Tyrol

Although they are closely connected to their homeland, South Tyroleans live a cosmopolitan lifestyle that enables them to see the bigger picture. Friends and business partners alike, both here and abroad, value South Tyroleans for their reliability and motivation. Some managers of global companies frequently jet off to modern art auctions in New York. Others spend their Sundays playing in the village band or marching in traditional dress with the historical *Schützen*, or local militia association. Many South Tyrole-



ans are members of clubs or engage in volunteer work. Others are active in political parties such as the Südtiroler Volkspartei (SVP), which has led the province since the end of World War II and represents South Tyrol's interests in the Italian and European parliaments. The other parties in South Tyrol's parliament are: Freiheitliche (The Libertarians), Popolo della libertà (People of Freedom), Partito Democratico (Democratic Party), Grüne (Greens), Süd-Tiroler Freiheit (South Tyrolean Freedom), Bürgerunion (Citizens' Union), Lega Nord (Northern League), Unitalia (Italian Unity).

The Lighting Designer

Flora Kröss (pictured) comes from Val Sarentino (Sarntal), a large rural mountain valley north of Bolzano known for its traditional culture and distinctive dialect. Today, Kröss and her husband run a company called Ewo, which is headquartered in



Cortaccia (Kurtatsch). The company has produced high-quality customised lighting systems since 1996, primarily for outdoor public areas. Ewo focuses on research and development and works with international architects and designers to create innovative lighting solutions. "Always the very latest—in all things," says Flora Kröss. The company is also very successful in terms of exports: the Ewo signature is seen in Copenhagen, Prague, Graz, Wolfsburg and Dubai.



Bolzano's Piazza Walther (Waltherplatz)

There is no place in South Tyrol quite so bustling and lively as Bolzano's Piazza Walther: here, you'll find hubbub and relaxation coexisting side by side. Who knows whether you'll hear the sound of a zither, jazz melodies, or Peruvian folk music? On a Sunday, it's very likely that you'll hear some Alpine music. On public holidays, the proud fleet of the *Alpini*, or mountain warfare soldiers of the Italian Army, is sure to parade through. Senior citizens enjoy each other's company, children splash in fountains, and teenagers chill out on benches. The bars—as cafes are usually called in this area—invite you to linger and watch the show: life in South Tyrol.

Tourism



The Free University of Bolzano South Tyrol has one of the youngest universities in Europe, born in 1997 from a local reality and international demand. The programme of the university is quite elite: anyone who cannot demonstrate knowledge of three languages—English, German and Italian—after a few semesters is not in the right place. Five departments offer undergraduate degrees as well as a master’s programme. The school works closely with other universities and educational institutions, especially in Innsbruck, Milan and Trento. In addition to teaching, the university is increasingly involved in research and has already established several areas for which it is internationally renowned.

Per Capita Income

South Tyrol’s households rank 23 percent above the national average, with an annual per capita income of over euro 21,465. The gross domestic product (GDP) per inhabitant is 37 percent above the European average.

Health Services

South Tyrolean residents are guaranteed quality medical care—either in the central city of Bolzano or at one of six associated hospitals—through a public health system that utilises a method of cost-sharing in which a co-payment is made by patients. There are additional health care facilities that offer high-quality medical care through an agreement with the province. Low-income, socially vulnerable, or elderly people all have access to health services, even if they cannot afford the co-payment.

A Törggelen party in South Tyrol (1)

With 5.6 million visitors a year, South Tyrol is among the leading tourist regions in the Alps. The holiday region stands out in a competitive field with an enticing mix: juxtaposing landscapes, rich cultural diversity, and a lot of fun in the sun.

Palms and cypresses against a backdrop of snow-blanketed peaks, the choice of South Tyrolean *Knödel* dumplings or Italian pasta for lunch, and fine dining in the evening: the province profits from its location on the crossroads of north and south just as much in terms of tourism as does its climate on the southern side of the Alps. The holiday destination offers tourists the wide range of recreational activities available in an Alpine region and a way of living that focuses on the good things in life. In combination with other attractions like the World Natural Heritage Dolomite Mountains, there is a rich diversity found in South Tyrol that makes the region one of the few holiday destinations in the Alps to record nearly continual growth over the past 20 years. Part of South Tyrol’s formula for success is a conscious fusion of landscape, products, and the re-



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gion’s centuries-old farming tradition. Its positioning as a paradise for recreation and sports, in particular, has given South Tyrol more and more market exposure in the past decade. Many tourists from Eastern and Western Europe have now joined the region’s regular—and loyal—tourist base from Germany and the rest of Italy. In addition to the usual mountain climbers, hikers and skiers, South Tyrol is now drawing a new breed of tourist such as golfers, wellness devotees, and foodies—to the tune of 28.6 million overnight stays.

Climate

“Enmity with the wind and a great friendship with the sun.” Stefan Zweig wrote these words at the turn of the twentieth century in reference to the climate in Merano. Today,



Zweig’s words are linked to the Land of 300 Sunny Days marketing campaign and really do make the point. The fact is that South Tyrol is located on the sunny side of Alps. Mountain ridges to the north and south shield many of its valleys from cold air and the humidity coming off the Mediterranean. The record holder in terms of nice weather was the municipality of Nova Ponente (Deutschnofen) when it recorded 2,360 hours of sunshine in 2010. Germany saw an average of 1,300 to 1,900 hours of sunshine that same year.

Tourism

On average, tourists stay for five days and spend €122 a day. South Tyrol’s 5.6 million visitors thus bring in almost 12 percent of the region’s net product. The main markets are Germany (46.2 percent) and Italy (36.6 percent). In addition to the Swiss and the Austrians, more and more new visitors are discovering South Tyrol as a holiday destination: these newcomers hail from Poland, the Czech Republic, the Netherlands, Belgium, France and England. About 61 percent of the total 28.7 million overnight

stays are recorded in summer; by contrast, winter brings more than a third of revenue. More than 10,000 facilities for lodging and their suppliers live from this revenue. About one in six employees in South Tyrol works in the hospitality industry.

A Land for Active People

With over 1,000 kilometres of ski runs, 400 lifts and 13,000 kilometres of pristine hiking trails, South Tyrol is known mainly as a mecca for skiers, mountain climbers, and hikers. The range of options in winter and summer alike, however,



goes far beyond these classics. Cross-country skiers will find a wide selection of stomping grounds to love; ski touring and snowshoeing enthusiasts will



Mild climate

A symbol of South Tyrol’s fusion of the Mediterranean and the Alpine: the spa resort town of Merano experienced its first halcyon days of tourism in the nineteenth century thanks to its mild climate. The town had a reputation for having a winter climate that was curative, and attracted visitors from across Europe, including important dignitaries such as Empress Elisabeth, or Sissi, and Franz Kafka. Even today, international celebrities like Princess Caroline of Monaco and Zinedine Zidane flock to the Espace Henri Chenot at Merano’s Palace Grand Hotel.

find plenty of excursions far from the madding crowd. Summer is even more diverse: the rich array goes from climbing in the Dolomites to popular swimming lakes nestled into vineyards and forests, and from trekking to Nordic walking to rafting or kayaking on the Isarco or Rienza Rivers. Golfers have seven courses to choose from in South Tyrol, and cyclists have extremes ranging from the narrow passes of the Dolomites to 600 kilometres of valley trails.



Farm Holidays

Visitors are fascinated by the world of South Tyrol’s farmers. Every year, about 1,700 people—most of whom are German—come to South Tyrol on a voluntary work assignment in order to experience what life is like today on a real mountain

farm. Ordinary tourists flock to farms in even greater numbers still. This niche market, branded with the *Roter Hahn* (Red Rooster) quality seal in 1999, could increase its number of overnight stays by 150 percent over the next decade. This common brand is a true success story with a clear marketing concept and strict quality criteria. Roter Hahn also markets high-quality rural products and taverns.

South Tyrol Superlatives

- DolomitiSuperSki has a total of 1,200 kilometres of slopes, making it the world’s largest ski carousel.
- Alpe di Siusi (Seiseralp) is the largest high plateau in Europe.
- The funicular from Bolzano to Colle (Kohlern) was built in 1908, making it the oldest cable car in the world.



- Caldaro (Kaltern) Lake is the warmest lake in the Alps.

Michil Costa

His La Perla Hotel in Corvara is one of the smartest in the Dolomites. He loves fine wines and cigars—a fact to which the 27,000 bottles in his wine cellar and his stock of 5,000 cigars can



surely testify. He has organised the celebrated Bike Marathon of the Dolomites for many years. Hotelier Michil Costa is much more than a honourable representative of his trade, though: he is an environmental activist, a former Green Party parliamentary candidate, a strong proponent of green tourism, a die-hard Frank Zappa fan with punk roots, a Ladin—Costa is a vocal supporter of South Tyrol's oft-forgotten third language group—and a fundraiser for the benefit of Tibetan refugees. In short, Costa is a perfect representative of South Tyrol's rich diversity.

Historical Inns

Splendid country estates, castles and palaces, stately grand hotels, and cosy *Stuben* parlours, with beams that speak to a century of rural history: many an authentic cultural treasure is just waiting to be discovered at South Tyrol's hotels and eateries.



❶ The Elephant Hotel, Bressanone: the name of this magnificent hotel in the town of Bressanone dates back to the 1551 arrival of an elephant in town—an event that is historically recorded. The Elephant is an upscale hotel, with antique furniture and spacious gardens, located at the northern entrance of the old town, which was once the Episcopal See.

❷ The Laurin Hotel, Bolzano: This traditional hotel in the heart of Bolzano has a turn-of-the-century flair and is the top address in town for business trips and professional meetings. On warm summer evenings, the magnificent garden and its ancient trees are definitely worth a look.



❸ The Alte Post Hotel, Sesto (Sexten):



A jewel of Alpine hotel architecture in the picturesque valley of Val Fiscalina (Fischleintal). A meticulous renovation has restored this landmark building back to what is essentially its original appearance.



2



A Land for Epicures *Gault Millau*: with 96 chef's caps, South Tyrol is one of Italy's most-awarded regions. St. Hubertus at the Rosa Alpina Hotel in San Cassiano (St. Kassian) achieved 4 caps for the first time in 2012. Three caps went to four of South Tyrol's restaurants, including a sensational newcomer, the Gourmetstube Einhorn in Mules (Mauls).

Guide Michelin: South Tyrol has 15 Michelin-star restaurants. Those honoured with two stars include Martin Obermarzoner of Jasmine in Chiusa (Klausen), Gerhard Wieser's Trenkerstube in Tirolo (Dorf Tirol) and Norbert Niederkofler's St. Hubertus in San Cassiano.

Luxury Hotels: The number of five-star hotels in South Tyrol has recently soared to fifteen. There are also 66 four-star-superior hotels and 343 four-star hotels. The highly regarded Vigilius Mountain Resort design hotel is known for its luxurious simplicity. The Rosa Alpina wellness hotel combines tradition and luxury in Val Badia's mountain village of San Cassiano.

Vigilius Mountain Resort (2)

German travel magazine *Geo Saison* chose this five-star property, which was conceived by renowned architect Matteo Thun, as the best European design hotel; it has also been distinguished for sustainable tourism and ecological standards. Vigilius Mountain Resort is located atop the pedestrian-only Vigilio Mountain (Vigiljoch), at an elevation of 1,500 metres, above the village of Lana near Merano.

Agriculture

Dairy farming, fruit growing, and viticulture are the pillars of agriculture in South Tyrol. The province produces quality goods, and markets them abroad expertly.

Summertime, when the cows and sheep are driven up to their alpine pastures, is probably the hardest time of year for the mountain farmer: young and old alike must help harvest and store enough hay to sustain the cattle through winter. The mountain farmer was once self-sufficient and the custodian of South Tyrol's cultural heritage; nowadays, farmers are often escaping to other professions. Cow's milk is mostly sold to the region's cooperatives. The province government is helping ensure survival on the mountains through subsidies as well. In the fertile valley, apple trees bloom in spring, and fruit farmers harvest the abundant yield in late summer. South Tyrol is Europe's largest apple-growing region, producing about 10 percent of Europe's supply. In addition, it is the oldest wine region in German-speaking Europe and one of the Italy's top wine regions. South Tyrol's wines regularly walk off with international awards.

Products marked with the province's *Qualität Südtirol* seal denote quality control and artisanal craftsmanship. These include *Speck* ham, wine, milk, bread, apples, and apple juice. South Tyrolean apples and the region's *Speck* are both registered with a designation of protected geographical indication (PGI). The South Tyrol Marketing Company (SMG) markets the province and, together with the South Tyrol Export Organization (EOS), also successfully promotes its products abroad. In addition, EOS opens doors to new markets.

South Tyrolean apples (1)

The apple is one of SouthTyrol's star products in Italy and abroad.

Happy Cows

That South Tyrol's milk comes from "happy" cows is presumably the result of species-appropriate animal husbandry and the lushness of the region's grasslands. In any case, South Tyrol's approximately 75,000 cows produce around 370 million litres of milk per year. That represents 3,3 percent of Italy's total milk production. In 2010, the region produced 100 million kilos of yoghurt, 45 million litres of fresh and long-life milk and 18 million kilos of cheese. The top seller, at least in Italy, is yoghurt: one of every four cartons of yoghurt sold in Italy comes from South Tyrol.

remainder is exported, with about a third of those going to Germany.

- Eleven of South Tyrol's apple varieties bear the European Protected Geographical Indication (PGI) seal of quality.
- The most-produced varieties in 2010 were: golden delicious (409,228 tonnes), gala (140,873 tonnes) and red delicious (106,106 tonnes).

South Tyrolean Speck in Japan

It's true that you may have to search for a little while due to the size of the selection. The wine department of Harrod's, London's most famous department store, has stocked



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The Apple: South Tyrol's Export Hit

- Apples are grown on 18,400 hectares, which represents 2.5 percent of South Tyrol's total surface area.
- Apples are grown at elevations between 250 and 1,100 metres. Integrated farming is practiced by 96 percent of fruit growers; organic farming by 4 percent.
- South Tyrol's 8,000 fruit growers harvest approximately one million tonnes of apples a year.
- Roughly half of South Tyrol's apple crop stays in Italy; the

Lindenburg Lagrein, a South Tyrolean red, ever since 2006. South Tyrolean products have long since arrived abroad. Niche products that have already achieved success, such as honey, grappa, and crispy *Schüttelbrot* crackers, are now in search of new markets. South Tyrolean *Speck*, which accounts for 39 percent of global production, meanwhile, had touched down in Japan.



2

A DOC Land The most recent issue of *Gambero Rosso*, which is Italy's most prestigious wine bible, bestowed its highest honour, the *tre bicchieri* (three glasses) award, to 27 of South Tyrol's wines. It's no wonder: just under 99 percent of South Tyrolean wines bear Italy's quality assurance label, the DOC (*denominazione di origine controllata*). This is quite remarkable given that South Tyrol's surface area for viticulture is only 5,300 hectares, making it Italy's smallest wine-growing region. On South Tyrol's steep slopes and foothills, 20 different varieties of grapes yield about 350,000 hectolitres of wine per year. The number of red and white wines produced is roughly equal. One third of the wine is destined for export; the rest is consumed at home. South Tyrol's main native varieties—Vernatsch (red), Gewürztraminer (white) and Lagrein (red)—are among its most distinctive.



3

Women and Beer

Margaret Fuchs von Mannstein (pictured) is one of the very few women in South Tyrol who holds the fate of a leading local company in her hands. In 2009, she became the first woman in the province to receive the Manager of the Year award. She is head of the largest beer brewery in South Tyrol, Forst, which has around 450 employees and records total sales of about 120 million euro a year. This mother of two daughters is the fourth generation to lead the brewery, which her family acquired in 1863. The family also owns Forst Castle—practically *noblesse oblige* in the region of Europe with the densest concentration of castles.



South Tyrol Agriculture at a Glance

- 6.6 percent of the labour force works in agriculture.
- In 2009, there were 28,755 tractors registered.
- The province introduced the Südtirol trademark in 1976; the EU approved it as a quality seal in 2005.
- In addition to wine, apples and milk, products marked with the Qualität Südtirol seal include strawberries, raspberries, cherries, assorted vegetables, honey, and herbs.
- More than 21,000 farmers are members of the influential *Südtiroler Bauernbund* (South Tyrolean Farmers' Union).
- South Tyrolean farmers are organised into more than 100 different cooperatives, which assume responsibility for marketing of products, among other things.

Manincor Winery (2)

Whiskey Distillery (3)

Italy's first whiskey distillery was founded in Glorenza (Glurns), the smallest town in the Alps with a still-intact city wall. This rather unconventional project in the upper Val Venosta supports the area's tradition of grain cultivation, which—unlike apple growing—is rapidly losing ground. Owner and whiskey aficionado Albrecht Ebersperger expects an annual demand of 600 tonnes of barley, rye and wheat and production of 1,000 barrels a year. The building, which is interesting from an architectural point of view, is also expected to attract tourists.

Architecture and Spatial Planning

In a mountainous province like South Tyrol, space for housing developments and commercial areas is limited. When the province received autonomy, a period of intensive construction began, and high quality architecture developed in the process.

South Tyrol's architecture reflects its history and society. Monasteries, churches, castles and manors have moulded the Land of the Dolomites since the Middle Ages. There was a simple, rural architectural culture shaped by the landscape and function. Trade and tourism brought prestige and sophisticated architecture to the region: the grand hotels on two well-known lakes, Lago di Carezza (Karersee) and Lago di Braies (Pragser Wildsee), are good examples. In some of South Tyrol's cities—particularly Bolzano—we find buildings engendered by Fascist rationalism. After WWII, housing became a problem that urgently needed to be solved. Italian architects were already picking up elements of local contemporary architecture, which would be further developed—especially from the 1970s forward—and would elbow out the Tyrolean style of architecture, which was quite romanticised then. Architects work in an area where land for residential and commercial purposes is limited and expensive. Before autonomy, there were few restrictions placed on building. In the 1970s, the province instituted laws for nature conservancy and regional development that tackled urban sprawl in the villages and curbed the destruction of the unique local landscape. Other changes in thinking have taken place as well: a new generation of architects focuses on construction in harmony with the landscape, the incorporation of new elements into old buildings, housing quality, and energy efficiency. Companies that can provide the technology necessary for contemporary architecture have also sprouted up.

Public Buildings

In the last 15 years, publicly advertised bidding competitions have allowed for a variety of architectural solutions and have served to foster contemporary architecture. The construction of the Museion, Bolzano's museum of modern and



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contemporary art, is a prime example. Other successful examples include the construction of the University of Bressanone, Messner Mountain Museum at Sigmundskron Castle, the renovation of Tyrol Castle, and the Vocational School for Industry and Handicrafts in Bolzano. These four projects are not only recipients of the prestigious Dedalo Minosse International Prize in architecture, but are also practical examples of good, local execution of design.

Architecture in South Tyrol Today

What is the face of South Tyrolean architecture today? Although new development is indeed demanding, the biggest challenge faced by builders and planners today is the redevelopment and redesign of existing structures. This is happening more and more, not only in commercial and residential

buildings located in rural areas but also in South Tyrol's towns, where there are a number of interesting contemporary examples.

Caldaro

The Viennese architectural collective *feld72* attained a successful symbiosis of new and old when it built the Wine-center. The new building consists of a large monolithic body, and the adjacent cellar structures are uniformly covered with a coating of dark red concrete slabs. Inside, the rooms are bright and airy.



Walter Angonese's architectural team also approached the Manincor estate very cautiously since preserving the ensemble was very important. The approach was so careful, in fact, that the new architecture is almost invisible: the three-story structure was built deep below the vineyard and thus disappears almost completely into the earth. The architect's concept was that a wine cellar should be recognisable as such.



Firmiano (Sigmundskron) Castle near Bolzano (1)



2

The Father of Contemporary Architecture The site builds it. This was the credo of South Tyrolean architect Othmar Barth (1927-2010), who brought landscape and architecture together like no other. In the late 1970s, the Bressanone native forged a contemporary architectural style with a unique regional character, influencing a whole generation of architects. He treaded very lightly when it came to historical structures, used local materials, and drew the surroundings and the landscape into his buildings. Barth, who was well known far beyond South Tyrol's borders, designed the Cusanus Academy in Bressanone, the Seehotel Ambach at Caldaro Lake, and the Aslago (Haslach) housing development near Bolzano. The next generation of architects followed Barth's credo of holistic building that makes a strong statement—taking it to a whole new level.

Residential building in Aslago, Bolzano (2)

The site builds it: the credo of architect Othmar Barth is reflected in this example in Aslago.

Residential Buildings in Lasa (3)

The interior of an old barn was gutted and a residential building integrated within.

Kobler Winery in Magrè (4)

Lasa (Laas)

Architect Ruth Pinzger and building surveyor Arnold Rieger developed a house-within-a-house concept in Val Venosta. They gutted a 100-year-old barn in the village centre and built a house inside. This energy-efficient renovation, which received an award from the province, maintained the original condition of the precious, massive stone walls.



3

Magrè (Margreid)

Two South Tyrolean architects, Lukas Mayr and Theodor Gallmetzer, created another example of successful integration of new elements into a building—this one in the area known as the South Tyrolean Unterland. The local Kobler Winery now has a space for wine tastings that blends into the historical walls in a way that is simultaneously bold, linear, angular and edgy. The exterior and interior can be transformed into one unified space by raising a glass panel.



4

Bolzano

Originally, the building was one of the signature buildings of the Fascist policy of Italianisation. From 1935 on, it served as a Fascist “training institute” for young women. After the war, the building fell into disrepair. In 1995, the European Academy of Bolzano (EURAC) awarded the renovation project to internationally renowned architect Klaus Kada, who built a glass, concrete and steel contemporary addition to the landmark building. EURAC is now a research centre where scientists from all over Europe come to work.

Laives (Leifers)

The extension of the parish church in Laives, designed by Merano architects Thomas Höller and Georg Klotzner, is now a city landmark. The new nave, outfitted with bronze-coloured metal plates, was added at a 90-degree angle. It is similar to a pyramid and stands a short distance from the old church building, connected by a glass passageway. Despite its dimensions, the structure is still subordinate to the old religious building.



6

Fascist Rationalism

Italian Fascism was a considerable force in shaping the appearance and character of the city of Bolzano. In 1928, the Victory Monument, in the form of a Roman triumphal arch, was inaugurated as the symbol of the Fascist regime. Marcello Piacentini, the architectural darling of the Fascists, designed the monument after winning a national competition for a new city plan for Bolzano in 1934. His *città nuova* was supposed to meet both the functional and symbolic needs of the new leaders. Victory Square, with the Victory Monument as its new centre, monumental buildings, axial streets and large Fascist-style squares were all meant to outshine the old town and its medieval arcades in a grand fashion. The *città nuova* is considered to be one of the densest complexes of Fascist architecture in Italy.



5

Historical Buildings

Modern architecture in South Tyrol took its first baby steps in Bagni Tre Chiese (Bad Dreikirchen), above Barbiano (Barbian) and overlooking Valle Isarco. In 1920, architect Lois Welzenbacher and South Tyrolean painter Hubert Lanzinger built a row of houses in the Alpine Bauhaus style. The houses are situated amidst meadows and forests at elevations of between 1,100 and 1,300 metres. Pension Briol is a cube clad in larch wood sitting on a slope; the inn's light shed roof and its porch, which is open towards the valley, serve to loosen up the austere impression. The current owner, Johanna von Klebelsberg, has commissioned Swiss architect Peter Zumthor, who occasionally visits the little mountain inn, with an expansion that respects the original architecture.

Architecture and Technology

In addition to Frener & Reifer, a South Tyrolean company that is now a successful global player in façade engineering, steel manufacturer Pichler has also evolved from a solid workshop into an international company. Founded in 1978, the industrial company delivers intelligent



7

combinations of steel structures and facades. Vienna's new central train station, with a surface area of 109 hectares, is one of Pichler's prestigious jobs. The Bolzano-based company's credits also include the sophisticated and specialised construction required for the Bergisel ski jump in Innsbruck, which star architect Zaha Hadid designed.

View of Victory Square in Bolzano (5)

Briol Pension (6)

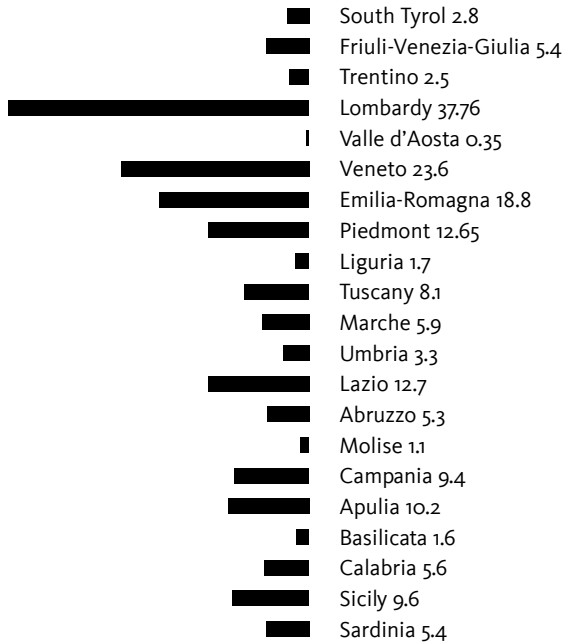
Bergisel Ski Jump in Innsbruck (7)

Pichler Steelworks did the specialised construction work for the ski jump.

Market volume for new buildings and renovations, by Italian region

Building permits in Italy, 2007, by region, in million m³

(Source: ISTAT - National Institute of Statistics)



8



9



10



Nova Levante (Welschnofen) There is even good architecture to be found in the commercial arena. The artisanal zone in Nova Levante, near Bolzano, was honoured with the first builder's prize for commercial spaces, primarily because the overall architectural concept integrates so harmoniously into the environment. Second place in the competition, which is sponsored by the Foundation of South Tyrolean Architects and Business Location Südtirol – Alto Adige, went to the sculptural building in which the offices of Barth, an interior architecture company in Bressanone, are housed. Third place was awarded to the new Ewo corporate building in Cortaccia.

Fortezza (Franzensfeste) (8)

Formerly a fortified Habsburg stronghold; post-renovation, it is now a venue for cultural events such as the Manifesta Art Biennale.

Municipal Housing Project (9, 10)

The Casanova (Kaiserau) project for municipal housing in Bolzano, by architect Christoph Mayr Fingerle, was presented at the 2011 Architecture Biennale in Venice.

The New Bolzano Station (11)

The Bolzano Train Station is about to set the stage for sustainable interior design in Bolzano. Viennese architect Boris Podrecca won the design competition for a complete overhaul of the Bolzano train station area. The project comprises an area of approximately 30 hectares, which connects the city centre with the northeast outskirts of the city. Private sponsors will shoulder financing, together with the city and the province.

Architecture in South Tyrol:

- ① Merano Arte (Kunst Meran): this gallery holds regular exhibitions on contemporary architecture in South Tyrol as well as on international trends.
- ② New Alpine Architecture Award: this international architecture prize has been awarded in Sesto (Sexten) in the Alta Pusteria (Hoch Pustertal) Valley since 1992.
- ③ The KlimaHaus Project: a quality seal at the institutional level for environmentally conscious building and living, established in South Tyrol.
- ④ StadtLandFluss: a project in South Tyrol's Valle Isarco that focuses on living with water.
- ⑤ The Ordine degli Architetti (Architektenkammer) of Bolzano is a guild for the architects, interior designers, landscape architects, and preservationists of the province of Bolzano.
- ⑥ The Fondazione Architettura Alto Adige (Architekturstiftung Südtirol) is aimed at architects and the general public alike. The foundation publishes a magazine called *turrisbabel*.



Culture

South Tyrol's cultural landscape is in quite an exciting phase: the province has been creating structures and buildings in order to elevate modern, contemporary culture to the level of that of time-honoured tradition. The effect of this fusion is now bearing fruit.



12

Südsterne (Southern Stars)

Martino Gamper is representative of the many South Tyroleans who have made careers abroad. A native son of the spa resort town of Merano, Gamper developed from a skilled carpenter into an up-and-coming star on the international design scene. He made his breakthrough with an exhibition entitled *A Hundred Chairs in a Hundred Days*. He now lives in London and tells stories with his furniture, which is successful because it is an amalgamation of old and new, craft and art, and international and regional influences. Gamper is also a member of Südsterne, a network of South Tyroleans working abroad. Südsterne is expected to be even more active in the future as an interface between South Tyrolean companies, institutions, and future foreign partners.



1



13

Specialist in interior construction

Some South Tyrolean companies have made an international name for themselves in the business of interior construction: Barth Interiors from Bressanone is a good example. The specialist in furnishings is now one of Europe's leading companies; its clientele includes many luxury stores and museums. Barth has worked together with numerous renowned architects and the company's ideas can be seen worldwide: the new Microsoft headquarters in the Italian municipality of Peschiera Borromeo, the four-storey Rolex flagship store in Milan, the German Museum in Munich, and the Teuco store in Paris all bear the signature of this South Tyrolean family business, which was founded in 1877.

A Hundreds Chairs in a Hundred Days (12)

This exhibition project brought Merano designer Martino Gamper international recognition.

Also architectonically sophisticated: the new headquarters of Barth Interiors in Bressanone (13)

Museum for Modern and Contemporary Art (Museion) (1,2)

In the last decade, South Tyrol has invested heavily in culture and education: The Civic Theatre of Bolzano opened at Verdi Square in 1999 and houses German and Italian-language theatre companies as well as production companies for opera and dance. The Museion, a museum of modern and contemporary art, opened in 2008 and exhibits such internationally renowned artists as Valie Export, Isa Genzken, and Carl Andre. In 2008, South Tyrol hosted the Manifesta European Biennale in cooperation with the neighbouring province of Trentino, in which 188 artists participated in six different venues. If you wanted to define culture in South Tyrol with one single hallmark, it would probably be the linguistic and cultural diversity of this small province: you'll find Italian, German and Ladin cultural events on the calendar every day.



2

Europeade

South Tyrol has been a land of culture for centuries: the Bavarian-Austrian influence to the north shaped society, as did



trade relations with the Italian-Latin south. The existing tradition of everyday rural and artisanal life came slowly into contact with the lifestyle of the urban world. Bolzano, the capital of the province, is the focal point of this culturally diverse amalgamation. The 2010 Europeade, a festival of European folk culture, was held in this city with just under 100,000 residents: music and folk dance groups came from all across Europe for the three-day festival, forming a kaleidoscope of colourful costumes.

The Film Industry

Pier Paolo Pasolini once said, “Movies are like dreams: both are poetic in nature”. In 1970, the celebrated Italian director shot *Il Decameron* at a number of different locations in South Tyrol. Pasolini was looking for a palace, a monastery, a church, and both rural and urban settings for his bizarre and irreverent film. He found all of this and more in South Tyrol. Today, a division of Business Location Südtirol – Alto Adige (BLS), the government agency in charge of developing the province as a business location, looks after the production crews who come to South Tyrol to shoot feature films and documentaries. South Tyrol’s identity as a film industry venue is relatively new. In the background, however, there have long been institutions like Zelig Film School, Italy’s premier



training institution for documentary filmmakers, and the Bolzano Film Festival, a festival for Austrian, German, Swiss, and Italian productions that celebrates 25 years in 2011. Industry giants like Wim Wenders are in regular attendance at the festival.



Incontri and Racconti

In 2011, BLS initiated the first Incontri meeting for co-productions. Incontri, which takes place during the course of the Bolzano Film Festival, is a way for Italian, German and Austrian producers to meet, get to know each other, and plan cross-cultural projects. BLS is also the driving force behind

Racconti, the South Tyrol Script Lab, which was conceived to support the development of nascent film material related to the province. To apply for Racconti, young screenwriters don’t even need to have a finished screenplay—simply an idea for a film. The selected projects are developed during a three-day retreat then refined into a treatment ready to be submitted to producers, potentially at Incontri. Once a producer is attached, the projects are eligible for submission to the BLS Film Fund & Commission for developmental funding. At that point, the project may reap the benefits of the generous financial support made available by the province government.

The 2019 Capital of Culture

South Tyrol has applied jointly with the other regions of north-east Italy to be the European Capital of Culture for 2019. The city and province of Venice and the regions of Veneto, Friuli-Venezia Giulia, Veneto and Trentino-South Tyrol are all applying together: this combined area offers a population of seven million, appealing frontmen in the city of Venice and the UNESCO World Heritage Dolomites, and—last but not least—the uniqueness of a multilingual area like South Tyrol. We will know whether northeast Italy’s bid for Capital of Culture has been successful when the EU announces the results in 2013.

The Stilfs.vertikal Festival

The hamlet of Stelvio (Stilfs) is located in the middle of the Stelvio Pass National Park. The Stelvio Pass is the highest mountain pass road in the Alps. In the mountain village, paths are steep, streets are narrow, and houses are perched up high. Here, 15 different clubs have joined forces to organise the Stilfs.vertikal Cultural Festival. It is meant to shine a spotlight on the lifeblood of the village and personal initiative. The festival takes place over the course of four days, and features a variety of musical and artistic presentations.



Rising Star

South Tyrolean author Sabine Gruber incorporates real contemporary history into her novels. With great success, too: her work *Stillbach oder Die Sehnsucht*, in which she combined German, Italian and South Tyrolean history from 1943 to 1945, made it onto the German bestseller lists in short order. Gruber's novel *Über Nacht* was nominated for the German Book Prize in 2007.

South Tyrol's Media

South Tyrol's media landscape is a reflection of the province's tri-lingual social structure. The newspaper with the largest circulation is the most popular German-language daily, *Dolomiten*, which was founded in 1882. Italian-language publications include *Alto Adige*, founded in 1945, and *Il Corriere del Alto Adige*, the local section of the influential paper *Corriere della Sera*. The *Neue Südtiroler Tageszeitung*, in publication since 1996, sees itself as a counterpoint to the powerful *Dolomiten*. The only weekly magazine in South Tyrol, called *FF – Südtiroler Wochenzeitschrift*, deals critically with topics such as politics, society, culture and the economy.

Radio and Television: The German-language Sender Bozen is the local television and radio affiliate of the state-owned RAI. Italian and Ladin associates share the local broadcast channel. *Südtirol heute* airs every day for 30 minutes: it is a news magazine produced by the local South Tyrol affiliate of Austria's ORF. Südtirol Digital Fernsehen (SDF) is the only German-language private television station in South Tyrol. It belongs to Rosengarten Media Group, which also operates the Italian private broadcaster Videobolzano033.

South Tyrolean Authors

Sabine Gruber
Joseph Zoderer
Claus Gatterer
Kurt Lanthaler
Sepp Mall
Gerhard Kofler
Anita Pichler
Konrad Rabensteiner
Josef Feichtinger
Bettina Galvagni
Selma Mahlkecht
Herbert Rosendorfer
Maxi Obexer
Josef Oberhollenzer
Brunamaria Dal Lago Veneri



3

Festivals in South Tyrol

- Antiqua Barock Musik
- Ferruccio Busoni International Piano Competition
- Merano Music Festival
- Gustav Mahler Music Weeks in Dobbiaco
- Transart – Festival of Contemporary Art
- South Tyrol Jazz Festival
- Danza Bolzano – Bozen tanzt
- The Upload Festival for young musical talent



4

Transart (3, 4)

The Transart culture festival, which has been held every fall since 2001 in and around the province capital, is known for outstanding actors and extraordinary venues.



Books about South Tyrol

- ❶ Francesco Palermo, Joseph Marko: *Tolerance Through Law: Self Governance and Group Rights in South Tyrol*
- ❷ Paul Hofmann: *The Sunny Side of the Alps: Year-Round Delights in South Tyrol and the Dolomites*
- ❸ Franz Thaler: *Unforgotten – A Memoir of Dachau*
- ❹ Hanspaul Menara: *South Tyrol, Paradise in the Dolomites*
- ❺ Rolf Steininger: *South Tyrol: A Minority Conflict of the Twentieth Century (Studies in Austrian and Central European History and Culture)*
- ❻ Gudrun Sulzenbacher: *The Glacier Mummy: Discovering the Neolithic Age with the Iceman*

Award-Winning Passion

In addition to established international cultural events such as the Gustav Mahler Music Weeks in Dobbiaco, you'll also find room for a creative—and sometimes bizarre—niche in South Tyrol. The Second Moon (*La seconda luna*) has become something of a Europe-wide competition these days. The contest, which the city of Laives (Leifers) runs, honours extraordinary people and their passions. Interestingly, passion itself is the primary focus; the object of passion is relegated to secondary importance. One winner was a Laives resident, the late Alois Clementi, who recreated, maintained and exhibited war ship models to scales of between 1:30 and 1:80. Another was Andrea Caputo from Salerno: he and his camera have been documenting graffiti scribbled on walls and railway carriages for 20 years.

European Competition (5)

Third place in the “competition of passion” went to Vittorio Napoli, who either walked or swam along the entire Italian coastline, from north to south.





6

An Abundance of Talent

The young musicians participating in the Ferruccio Busoni International Piano Competition enriched Bolzano's music scene for more than a week. The virtuosos hailed from all over the world and performed piano repertoire ranging from classical to romantic to contemporary. A prestigious jury led by celebrated Argentinian pianist Martha Argerich judged the 2011 competition. Argerich won the first Busoni Competition in 1957, kicking off an illustrious



7

international career at the tender age of 16. The competition has brought the world's most promising young talents to Bolzano every year since 1949.

The Burgtheater in Bolzano

South Tyrol has a rich and diverse theatrical landscape. In addition to its approximately 230 Volksbühnen (People's Theatres), there are half a dozen small civic theatres and two larger theatrical production companies: the Vereinigte

Bühnen Bozen and the Teatro Stabile di Bolzano. The visiting productions at Bolzano's Waltherhaus are particularly noteworthy: For several years, the Südtiroler Kulturinstitut has brought some of the most prominent productions in German contemporary theatre to South Tyrol. Berlin's Maxim Gorki Theater, Schauspiel Frankfurt, the Münchner Kammerspiele and Hamburg's Thalia Theater are just some of the illustrious theatres that have sent productions to South Tyrol. These guest performances play not only in Bolzano, but also in the smaller towns of Merano, Bressanone, Brunico and Silandro (Schlanders).

Val Gardena Sculptor Aron Demetz

Aron Demetz, born in 1972, is a good example of how tradition and modernity can be successfully fused. The sculptor has been working with wood since childhood: he learned the art of carving in Val Gardena and later attended the Academy of Fine Arts in Nuremberg. He works his human-sized figures with fire and resins, with silicone and with computer technology: they are archaic and ice cold—the human figure depicted in a state of continual metamorphosis. Aron Demetz participated in the Biennale in Venice and is a member of the promotion committee for the 2019 Capital of Culture.



8

*The studio of Aron Demetz (6)
Ferruccio Busoni International Piano Competition (7)
A scene from Bolzano's Teatro Cristallo (8)*

BLS

Many companies are already using South Tyrol as a springboard into the Italian market and are taking advantage of the support offered by Business Location Südtirol – Alto Adige (BLS), the government agency charged with promoting South Tyrol as a business location.

“South Tyrol’s strength is the fact that it is located between two major markets,” says Ulrich Stofner, who became director of the newly formed BLS in 2009. Since then, the agency has used sharp marketing strategies to position South Tyrol as an attractive business and film location and has been actively helping local, national and international companies that would like to settle in South Tyrol or that want to expand their operations. The support services BLS offers run the whole gamut from site selection to consultations about taxes, subsidies, and legislation to networking and establishing contacts with the main service organisations and business associations. BLS services are not limited to successful settlement, though: the agency continues to be available to businesses as a point of contact and a partner. In doing so, BLS successfully carries out its strategic goals of promoting South Tyrol as a business location with expertise. Many companies have settled into this border region, particularly in South Tyrol’s key sectors—renewable energy, for example. This has not only increased South Tyrol’s know-how in these areas and raised productivity in the province, but has also created jobs for skilled workers. BLS’s key tasks include developing South Tyrol as a sustainable business location and continually improving its business environment.

A Close-Knit Team (1)

Since 2009, BLS has guided and assisted businesses that want to settle in South Tyrol and provided support for production teams shooting television programmes or films in South Tyrol.



1

An Ideal Location

The German company juwi Holding is globally active in the renewable energy sector. Juwi recorded sales volume of 800 million euro in 2010. The energy giant from Rheinland-Pfalz also chose Bolzano as its entry point into the Italian market. Arnold Lunger, CEO of juwi’s South Tyrol branch says, “South Tyrol was destined for this. One simple reason is bilingualism. Above and beyond that, however, there is the matter of bridging the cultural gap—because Italy’s business culture is very different from that of Germany.” It is South Tyrolean know-how, above all, that has benefited Bürkle, which specialises in pre-fabricated cellars: the German company has

recently opened an office for its Italian market in the municipality of Appiano (Eppan)—thanks to help from BLS. “The prefabricated house was completely unknown in Italy until recently,” says Adalbert Gaus, who is responsible for Bürkle’s Italian operations, “but now a new market is emerging here”. South Tyrol was an ideal point of entry into Italy for the company from Baden-Württemberg: The KlimaHaus Agency, based in South Tyrol, sets standards for energy-efficient homes and many Italian provinces are adopting these standards. Now, Bürkle delivers cellars to match those homes.

Cooperation

South Tyrol's province government has entrusted Business Location Südtirol – Alto Adige with far-reaching authority regarding commercial areas. BLS settles companies and arranges contacts for them with private landowners and municipalities. Its partnership with South Tyrol's municipalities is particularly structured: local governments utilise the BLS real estate portal, listing their available commercial spaces online—free of charge. There is also a site-development project called STEP, which is a joint initiative between the province of South Tyrol and the association of local authorities that is supervised and coordinated by BLS. The goal of the STEP project is to strengthen South Tyrol as a business location over the long term. South Tyrol's municipalities have been grouped into 20 overarching areas with the aim of making intercommunal decisions about location issues in future. Communities should decide together in the future, for example, if and where a commercial zone will be created.



3

New Technology Park

Developing individual strengths and ensuring South Tyrol's attractiveness as a business location: these are the goals of the technology park that is being developed in Bolzano's commercial zone. Here, the Free University of Bolzano, research institutions like the Fraunhofer Institute and EURAC, and a number of innovative companies will advance know-how in the key sectors of renewable energies, energy efficiency, sustainable mobility, and food technology. The TIS Innovation Park will lead this centre for innovation: TIS will take responsibility for management of the park and the transfer of know-how and technology between the park's various organisations, among other responsibilities. BLS will be responsible for bringing in suitable companies from home and abroad. These companies will, of course, expect to find an advantageous business environment. The architectural concept is another important factor: Contemporary architecture will enhance an industrial building that has been listed as an historical monument, creating a harmonious fusion of old and new. This main complex of the technology park is planned to be a zero-energy structure and energy self-sufficient.



2

Film Promotion South Tyrol has always been a shooting location for international film productions: recent examples of films shot in the Dolomites include the German feature film *Schwestern* by Anne Wild, the documentary film *Die Fugger* by André Schäfer, and the Italian features *Diaz* by Daniele Vicari and *Il volto di un'altra* by celebrated director Pappi Corsicato. All of these productions benefited from the substantial film funding being offered by South Tyrol's new Film Fund & Commission, which BLS has managed since 2010. The province committed five million euro in grants for the year 2011. Funding is targeted towards high-quality productions—often German/Italian co-productions of film or television projects—that are wholly or partially filmed in South Tyrol. The goal of promoting these films is to position South Tyrol as a film location over the long term and to support the province's film industry. BLS works not only to promote South Tyrol as a film location—helping to further develop it with film funding and financing—but also provides comprehensive production and location services. BLS supports production companies as they scout for locations and look for personnel, provides them with consultation services regarding legal matters and taxation, and helps them obtain film permits.

Filming in South Tyrol (2)

High-quality television and film productions benefit from the substantial film funding offered by South Tyrol.

The building that houses the South Tyrol Chamber of Commerce and the BLS headquarters, on Bolzano's Verdi Square (3)

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