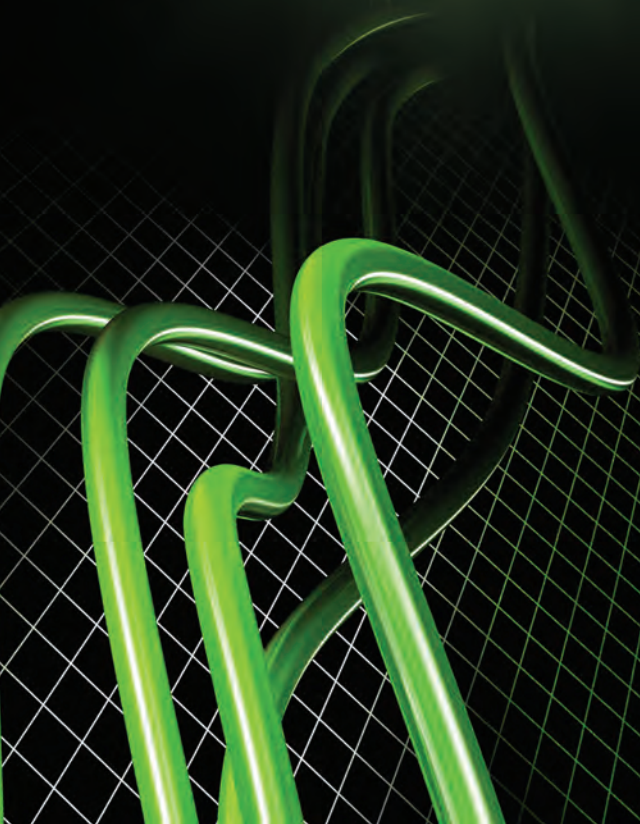


ENERGIZING OUR ECONOMY

annual report

09



alleghenyconference
ON COMMUNITY DEVELOPMENT

Mission Statement

The Allegheny Conference on Community Development and its Affiliates – the Greater Pittsburgh Chamber of Commerce, the Pennsylvania Economy League of Southwestern Pennsylvania and the Pittsburgh Regional Alliance – work together to stimulate economic growth and improve the quality of life in southwestern Pennsylvania.

About the Conference

Founded in 1944, the Allegheny Conference on Community Development is one of the nation’s leading economic and community development organizations, combining strong private sector leadership with commitment from public sector partners. Our strategic focus is on creating a more competitive business climate and marketing the Pittsburgh region for investment, job creation and top talent. The Conference relies upon the Regional Investors Council – leaders of more than 300 companies and organizations – to provide time, talent and resources to advance our agenda.

Three affiliated organizations, each staffed by the Conference, provide research and analysis, advocacy and marketing to realize the vision of the Conference leadership.

The **PENNSYLVANIA ECONOMY LEAGUE OF SOUTHWESTERN PENNSYLVANIA** provides public policy research and analysis on the most critical issues for our region’s competitiveness.

The **GREATER PITTSBURGH CHAMBER OF COMMERCE**, working with private and public sector partners, serves as our region’s chief advocate at all levels of government to se-

cure public sector investment and legislative and regulatory improvements to our business climate.

The **PITTSBURGH REGIONAL ALLIANCE (PRA)**, a 10-county regional economic development partnership, markets southwestern Pennsylvania to companies across the region and around the world to attract capital investment and stimulate job creation.

Learn more about how our structure works on page 8.



Letter from the Chair



BACK IN THE GLOBAL GAME

Following the recent G-20 Summit, Pittsburgh is on the global map as never before. Our region is a model for economic, environmental and quality of life transformation.

Together we’ve put Pittsburgh back in the global game. We must now ask ourselves, is Pittsburgh truly positioned to win that game?

The recession may have come late to our region, but it has come. Unemployment has increased and business investment has slowed. As the global economy begins to recover, it would seem that other regions around the world are poised to grow faster than ours. They have younger, growing populations and, in many cases, more favorable business climates.

The Allegheny Conference on Community Development is committed to continuous improvement in our region’s economy and quality of life. As you will read in this report, we are working to create a

more competitive region by tackling tough issues in civic policy, business climate and transportation infrastructure. We are reinforcing our position as a gateway to opportunity by attracting business investment and talented workers to fill the jobs that are being created here. And we are building on our historic strength of energy development by exploring emerging opportunities in energy and creating a hotbed of innovation in our region.

By focusing on these priorities with single-minded determination, we can continue to build on our foundation of economic transformation and ensure sustainable prosperity for all who will call the Pittsburgh region home in the years ahead.

And, yes, we can win the game.

John P. Surma
*Chair, Allegheny Conference on Community Development
Chairman & CEO, United States Steel Corporation*



Where are We as a Region? We're a Model for a 21st-Century Economy

"Pittsburgh is a world-class city. It represents the transition of the U.S. economy from an industrial state to a mix of strong industry – steel – but also now biotech and clean energy. It has transformed itself, and serves as a model for turning the page to a 21st-century economy."
– President Barack Obama

For the Pittsburgh region 2009 was both the best of times and the worst of times. By year end, the unemployment rate had topped 7.9%, the highest in more than 16 years. More than 73,000 jobs had been lost, undoing many of the gains of recent years.

At the same time, the region enjoyed unparalleled national and global publicity, with professional sports teams winning the Super Bowl and the Stanley Cup and the success of The Pittsburgh (G-20) Summit.

On balance, the region outperformed the nation in terms of:

- the unemployment rate, which tracked about two points below the national average for much of the year;
- the mortgage foreclosure rate, which was less than half the national average; and
- the value of both residential and commercial property.

In fact, *Moody's* declared Pittsburgh the top commercial real estate market in 2009, noting that Pittsburgh was one of the few markets in which home prices actually increased during the year and the region placed No. 7 in the "2009 Site Selection Governor's Cup rankings for TOP METROPOLITANS (1 Million+ population)."

Even more important than outperforming the national average, **the region performed near the top compared to 14 benchmark regions** by such important measures as change in employment, unemployment rate and wage growth.

Pittsburgh's story is one of resilience. By 2009, the region had completed a remarkable comeback from the economic collapse that had begun almost 30 years before. Traditional industries in financial and business services, advanced manufacturing and energy had remade themselves, providing a strong foundation. New industries had sprung out of our 35 colleges and universities in health care and life sciences and information and communications technology. And the region had enhanced an already high quality of life with a



thriving arts and cultural scene, park and riverfront trail construction, and national leadership in intelligent building technologies.

Having come through a challenging year, Pittsburgh may be as well positioned as any region in the nation to prosper as the global economy recovers.



Resilience Through Diversification

Pittsburgh's prosperity is powered by key industry sectors:



Advanced Manufacturing

Top manufacturers like Alcoa, Allegheny Technologies, Bayer, Bombardier, Eaton, H.J. Heinz, Koppers, LANXESS, NOVA Chemicals, PPG Industries, U. S. Steel and Westinghouse thrive here. Smaller precision tooling and machining companies meet global demands for the components that keep the world's machines running.

Financial and Business Services

Global institutions with headquarters or major business units here include BNY Mellon, Citizens Bank, Federated Investors and PNC. Two of the world's largest law firms – K&L Gates and Reed Smith – are based here, as is Pennsylvania's largest health insurer, Highmark.



Education and Research

The region's intellectual capital includes 35 colleges and universities, including two Tier One research institutions – Carnegie Mellon University and the University of Pittsburgh – while 100 corporate research and development centers keep Pittsburgh in a pacesetter position.

Health Care and Life Sciences

Pittsburgh's health services sector, employing almost 184,000 people, builds on a legacy of biomedical innovation to create a robust network that's cultivating lifesaving technologies, medical device advances, regenerative medicine and pharmaceuticals. UPMC has grown into the region's largest employer and an \$8 billion global health care enterprise. GlaxoSmithKline Consumer Healthcare, MEDRAD, Mylan, Philips Respironics and West Penn Allegheny Health System are also part of this sector.



Information and Communications Technology

Almost 1,600 technology firms including ANSYS, Apple, Black Box, Google, Intel and Mastech are here and employ some 32,000 people. A tech-savvy talent pipeline and robust network of organizations that support and finance innovation continue to grow Pittsburgh's knowledge-based economy.



Energy

A diverse and balanced portfolio is enhanced by Pittsburgh's development of sustainable energy solutions and components. Grounded in oil, natural gas and coal extraction expertise that dates back more than 150 years, the region's energy economy now includes more than 700 firms spanning extraction, supply chain and innovation for traditional and alternative energy resources. These firms contribute some 105,000 jobs and generate \$13.7 billion in annual economic activity.





The Pittsburgh (G-20) Summit 2009 – The World is Paying Attention



The Allegheny Conference was a founding member of The Pittsburgh G-20 Partnership, with Allegheny County, the City of Pittsburgh and VisitPittsburgh. Together, we set out to provide a safe and welcoming setting for an important conversation about the global economic crisis and to achieve three additional goals:

- Leverage the opportunity to raise awareness of the positive realities of today's Pittsburgh region.
- Generate leads for business investment and future conventions and conferences.
- Let talented people the world over know that there are tens of thousands of open jobs in the region and numerous career opportunities.

We met our objectives. The Pittsburgh Summit was largely peaceful, with little of the violence that has plagued similar meetings around the world. Even more unprecedented was the positive exposure our region received, with almost 7,000 news stories in the United States alone, and thousands more around the world. Important publications have told the story of our region's economic, environmental, and quality of life transformation, not just over the past 30 years, but really over the 65-year period since the Allegheny Conference was formed.

The Pittsburgh G-20 Partnership shared these three key messages about the transformation of our regional economy, which consistently surfaced in the multitude of positive coverage we received:

- Pittsburgh builds upon its historic strengths as a hub for manufacturing, financial and business services, and energy.
- Pittsburgh leverages human capital to create new industries based on research, innovation and entrepreneurship (information technology, life sciences, materials science and where they intersect – such as in medical devices and robotics).
- Pittsburgh capitalizes on its natural and cultural assets to invest in infrastructure and facilities that improve our quality of life.



"The Summit was a once-in-a-lifetime opportunity resulting in the global exposure that our region has long deserved and could never afford to buy. That exposure is already paying dividends, from an increased number of international companies and investors eager to learn about opportunities here – which fuels the Pittsburgh Regional Alliance's business investment project pipeline – to the tourism and convention business, in which five conventions (expected to bring \$8 million in economic impact) have booked here as a result of interest sparked by the Summit. And these are just the early indications of success. Pittsburgh welcomed, served – and wowed – the world's most influential leaders, their delegations, and some 3,000 journalists. We met their needs and demands, proving that we can seize the opportunity."

– Doris Carson Williams,
Co-Chair, The Pittsburgh G-20 Partnership,
Chair, VisitPittsburgh and President/CEO,
African-American Chamber of Commerce
of Western Pennsylvania

The Pittsburgh (G-20) Summit 2009 – Uniting a Global Region

“In a global economy, diversity is a strength that a region must have, and The Pittsburgh Summit gave us the opportunity to show what a truly global region we are. **Greeting our international guests were the faces and languages of many nations – men and women who now count themselves as Pittsburghers – amplifying the message that Pittsburgh is becoming increasingly diverse and inclusive. We must take advantage of this global attention to attract – and retain – even more exceptional talent.**”

–Sunil Wadhvani, Allegheny Conference Board Member and
Chairman and Co-Founder of iGATE Corporation



The phones rang off the hook as soon as Pittsburgh was announced as the G-20 Summit host. Ultimately, more than 3,500 individuals volunteered in various capacities to make it a success – learning and sharing ideas at “Welcome The World” orientations; getting their hands dirty in cleanup and beautification efforts; offering assistance at the Pittsburgh Welcome & Media Center; and serving as hospitality ambassadors and multi-lingual attachés at area hotels.



“I’ve been in the business of hosting international visitors for more than 20 years, so I’ve repeatedly witnessed firsthand how Pittsburghers open their hearts and their homes to showcase life in our region and welcome newcomers. When the G-20 came, this happened en masse. **The volunteers didn’t just step up to the plate, they leapt across it.** When I asked Chinese delegation members how useful the volunteers had been, their faces just lit up. They said how wonderful it was to have someone local on hand speaking their language and offering to help. The volunteers added a dimension of warmth that the delegations did not expect – but greatly appreciated – and it seemed to set Pittsburgh apart from other destinations. It was a pleasure to work with Tinsy Lipchak of VisitPittsburgh and Andy Pugh of the Welcome Center for Immigrants and Internationals to coordinate and prepare our volunteers to be such amazing regional ambassadors.”

– Gail Shrott, Vice President, Program Services, GlobalPittsburgh
(formerly Pittsburgh Council for International Visitors – PCIV)



“Pittsburgh, City of Renewal”

– The Atlantic (September 24, 2009)

“Summit Spotlights ‘Steel City’s’ Extreme Makeover”

– National Public Radio (September 24, 2009)

“Reinvented ‘Steel City’ Chosen for G-20 Summit”

– Pravda (September 23, 2009)

“Pittsburgh showcases green economy at G-20 Summit”

– Reuters (September 20, 2009)

“Pittsburgh Shows How the Rust Belt Can Be Polished Up”

– The Washington Post (September 24, 2009)

“Pittsburgh’s story is inspiring and impressive. It was a rusting steel-making behemoth that, through struggle, pain and creativity, retooled itself as a surprisingly vibrant, 21st-century leader in education, computer science, medical research, sports entertainment and boutique manufacturing ... Pittsburgh’s rebirth is about the grit, sacrifice and hustle of locals – not the sweeping plans and power of federal bureaucrats.”

– “What Pittsburgh (Don’t Laugh)
Can Teach Obama”
– Newsweek (June 6, 2009)

“A city that has fought back from the depths of hard times hopes to show the rest of the world what recovery is as world leaders converge on Pittsburgh to discuss the world financial crisis at the Group of 20 Summit starting tomorrow.”

– “Pittsburgh pulls up socks as it
prepares for G-20 Summit”
– China Daily (September 23, 2009)

“The city of bridges has built a bridge from its steel past to a diverse 21st-century economy. The Summiteers arriving on September 24th can take note.”

– “The revival of Pittsburgh:
Lessons for the G-20”
– The Economist (September 17, 2009)

“Slowly, Pittsburgh’s transformation has captured the attention of other communities now confronted with economic crises of their own ... These other cities will have to find solutions that draw on their strengths, while showing courage to move beyond what defined them as a community. In that sense Pittsburgh can serve as an inspiration.”

– “Renaissance: Thriving on
diversity instead of its mills”
– The Financial Times (September 23, 2009)

“When President Barack Obama announced that Pittsburgh had been chosen to host the G20 Summit, there were derisory sniggers in some quarters, where the city still evokes images of soot, smog and smelters. But those who have watched the Pennsylvania city undergo a stunning transformation from polluted steel town to become a cosmopolitan hub at the forefront of green technology were delighted.”

– “Born-again Pittsburgh poised
to welcome G-20”
– Agence France-Presse (September 21, 2009)

“This former heavy industry mecca retooled after hard times with ‘green’ pursuits that offer the world a path out of the current economic downturn.”

– “Pittsburgh’s heart of steel still
beats amid transformed city”
– USA Today (September 21, 2009)

We're Back in the Global Game – How Do We Win It?

Our Model

The Conference is the parent organization for its three affiliates – the Pittsburgh Regional Alliance (PRA), the Greater Pittsburgh Chamber of Commerce and the Pennsylvania Economy League of Southwestern Pennsylvania – that share a strategic vision and work together for regional improvement, setting the 21st-century standard for civic stewardship:

Pittsburgh Regional Alliance



"The PRA markets the benefits of conducting business in southwestern Pennsylvania to companies all over the world and here at home that are growing, relocating or expanding. We're effective because we leverage a 10-county regional partnership and the engagement of existing business leaders. There's nothing like CEO-to-CEO contact to encourage business investment."

– J. Brett Harvey, Pittsburgh Regional Alliance Partnership Chair and President & CEO, CONSOL Energy, Inc.

Pennsylvania Economy League of Southwestern Pennsylvania



"Achieving real change that promotes economic growth requires comprehensive and detailed information to back up any specific proposal. For almost 75 years now, the Economy League has been a trusted resource to provide thorough and documented research, analysis and recommendations on the pressing issues impacting our regional and statewide competitiveness."

– Laura E. Ellsworth, Pennsylvania Economy League of Southwestern Pennsylvania Chair and Partner-In-Charge, Jones Day Pittsburgh Office



Greater Pittsburgh Chamber of Commerce



"Armed with PRA market intelligence and Economy League analysis, the Chamber advocates in Harrisburg and Washington, D.C. for business climate improvements. Day in and day out, it leverages its expertise and longstanding relationships to influence legislation that leads to an even more competitive regional environment for new and existing businesses. Of course, this makes the PRA's regional marketing efforts all the more effective."

– Terrence J. Murphy, Greater Pittsburgh Chamber of Commerce Chair and Vice President, External Affairs, NiSource Gas Distribution Companies

Regional Investors Council



"Truly engaged leadership and successful public-private partnership sustain and develop regional prosperity and energize the Conference itself. Some 300 regional employers compose the Regional Investors Council. I encourage all of southwestern Pennsylvania's business leaders who imagine better things for our region to put action behind their words and join us in our work for an ever-brighter regional landscape for future generations."

– Kimberly Tillotson Fleming, Allegheny Conference Treasurer and President, Hefren-Tillotson, Inc.

2009-2011 AGENDA

Strengthened by a 65-year history and propelled by today's leading organizations, the Conference and its Affiliates are focused on five priorities that trigger regional transformation:

Business Climate

We create the solutions for the tax and regulatory challenges that hold our region's employers back – and advocate for change at all levels of government. *See page 14*

Business Investment

As a 10-county economic development hub, we are nationally recognized for our global outreach and project management expertise. *See page 11*

Civic Policy

We roll up our sleeves and work with elected officials to streamline our government, reducing duplication and improving its responsiveness. *See page 15*

Transportation and Infrastructure

We open doors to growth by convening strategic partnerships and pushing long-term projects to fruition. *See page 13*

Workplace

We are focused on creating a skilled future workforce while pooling regional resources to attract and retain today's top talent. *See page 12*

And an emerging, cross-cutting opportunity...

Energy

Pittsburgh is better positioned than any region in the U.S. to achieve critical mass as an energy solution provider, engineer a 21st-century energy infrastructure, and provide abundant energy to its people and to America. *See page 16*





Pittsburgh Regional Alliance:
Top Economic Development Group
– Site Selection, 2007 and 2008

The Pittsburgh Region:
No. 7, Top Metropolitans (1 million+ population)
– Site Selection, 2008 and 2009 Governor’s Cup
No. 9, North American Cities of the Future 2009/10
– fDi (a Financial Times publication)

Stimulating New Business Investment

Pittsburgh has been hailed as a “model for turning the page to a 21st-century economy.” Our economy is diverse, resilient and predictable – resulting in consistent, sustainable growth.

The Pittsburgh Regional Alliance (PRA) works across the public and private sectors in cooperation with elected officials, economic development professionals and the business and real estate communities to attract capital investment and create jobs in the 10-county Pittsburgh region. Examples from the 30 business investment deals closed by the PRA during 2009 are highlighted below. Despite it being a year of global economic challenge, these “wins” – in addition to many others – were influenced by the PRA’s marketing, research and project management expertise, as well as the organization’s model approach to collaboration to achieve economic development success.



*“Despite a tough economy during 2009, the PRA maintained solid project activity and met its goals. **We closed 30 business investment deals that retained 3,548 jobs, will create 2,166 jobs and result in capital investment of \$134M** – and which represent exciting examples of the region’s transformation to a balanced, diversified economy. **Pittsburgh is setting the standard for a 21st-century economy, and that’s the message the Pittsburgh Regional Alliance is taking to the world.**”*

– J. Brett Harvey, PRA Partnership Chair and President & CEO, CONSOL Energy, Inc.

Thermo Fisher Scientific, Inc.

Headquarters expansion for advanced manufacturing company
\$30M+ investment

Having outgrown its current facility and wanting to realize efficiencies associated with a larger operation in the Pittsburgh region, Thermo Fisher Scientific purchased the former Dick’s Sporting Goods headquarters in Findlay Township (Allegheny County). The company will relocate and begin expanding its operations this year. A PRA benchmarking analysis showed that Pittsburgh was the optimal location for immediate and long-term growth because of the available workforce and overall costs.

Fenner Dunlop Americas

Headquarters relocation, mining industry conveyor belt manufacturer

Conveyor belt manufacturer Fenner Dunlop Americas, a wholly owned subsidiary of UK company Fenner, PLC, moved its corporate headquarters from suburban Atlanta to Robinson Township (Allegheny County). Now strategically located at the heart of its North American customer base, Fenner Dunlop provides total conveyor belt solutions to the coal and hard rock mining industry. In doing so, it is integrated into the Pittsburgh region’s growing energy economy, which comprises traditional (including coal) and alternative energy sectors.

Serious Materials, Inc.

Advanced manufacturing attraction project, closed site re-opened with green jobs

This California-based company acquired the former Kensington Windows plant in January 2009 and re-tooled it for the production of energy-efficient windows. With the acquisition came the re-hiring of a number of the manufacturing-savvy employees who lost jobs when Kensington Windows closed and the anticipation of more green advanced manufacturing jobs with the new company. Serious Materials was recognized nationally by President Obama for job creation that will aid the nation’s recovery while innovating and creating the technologies that will fuel America’s long-term prosperity.



Education Management Corporation (EDMC)

Headquarters, back office and data center expansion

\$30M+ investment, 600 new jobs, 2,500 retained
EDMC, one of North America’s largest providers of private post-secondary education, is expanding its downtown Pittsburgh headquarters and its existing online higher education facility in Pittsburgh’s Strip District in addition to building a new data center – all within Allegheny County.

BeamOne, LLC

Medical devices services attraction, supports health care and life sciences sector
25,000 sq. ft. lease, \$9M investment

Targeted marketing of the region’s medical device strengths helped California-based medical device sterilization company BeamOne decide to locate its fifth service center in Clinton Township (Butler County). Using electron beam technology, BeamOne will provide required device sterilization services locally, benefitting the growing number of regional medical device manufacturers who will no longer have to ship products out of state for sterilization. This customer base proximity increases BeamOne’s product turnaround, while it gains the relative cost savings of locating in our region.

Workplace: Attracting Talent



“Last year, President Obama said, ‘the key to prosperity is in Pittsburgh, not just New York or Washington.’ That’s at the heart of our work to position Pittsburgh as a location of choice and opportunity. Today’s key growth industries, including energy, require having the right people to fill the jobs that we have and the right resources in place to easily connect employers and job seekers. We continue to expand **ImaginePittsburgh.com**, which highlights the live-work-play assets of our region, tells the stories of people building successful careers here and is the gateway to **ImagineMyNewJob.com**, which the Conference launched in 2008. **For the first time, our region has a one-stop job search portal that makes all the jobs across our 10 counties available in one place. And there have consistently been about 25,000 of them, even throughout the recession.**”

– Randy Dearth, Allegheny Conference Workplace Committee Chair and President & CEO, LANXESS Corporation

Enhancing the Talent Pipeline

To build sustainable regional prosperity, we must ensure that both our existing businesses and our workforce can innovate and adapt to meet a rapidly changing global economy. In support of this, the Conference Workplace committee focuses on the following:

Connecting employers and job seekers with ease. **ImaginePittsburgh.com** has a one-stop, comprehensive job search engine that aggregates all the electronic job postings within a 71-mile radius of Pittsburgh – from large job search engines and private company sites – to help job seekers find the range of exciting opportunities that are available now.

Developing a diverse and more inclusive workforce by attracting talented people from outside the region and creating opportunities for those who are already here.

Building a well prepared workforce that understands our diverse economy and can effectively plan for and attain the skills and education needed to secure family-sustaining employment in our region. The Pittsburgh Regional Compact, established in late 2007, is helping students start early, by connecting regional businesses to school-based career awareness activities. Learn more at PittsburghRegionalCompact.org.

Home to Apple, Intel and Google research

A lifesaving center for health care and life sciences

\$1 billion annually in energy solutions research

Sustainable thinking, leading in green

Kayak the three rivers or bike straight to Washington, D.C.

Stable housing market, more for your money

More than 100 billion-dollar-plus corporations

A top U.S. financial center

IMAGINEPITTSBURGH.COM

pittsburgh
imagine what you can do here.®

Transportation & Infrastructure: Making Connections

In 2009, southwestern Pennsylvania enjoyed three major transportation improvements that the Conference, working with its regional partners, has focused on for many years.



“Our transportation and infrastructure priorities are critical to attracting and retaining the investment that fuels regional economic growth. We’re committed to maintaining and expanding air service because it connects our people and our businesses to the global economy. The designation of I-376 is about much more than new highway signs. It puts our region on the map, literally, and on more site location investment lists. And another critical part of the transportation network is having an efficient and effective public transit system that provides residents with quality service.”

– Peter J. Kalis, Allegheny Conference Transportation & Infrastructure Committee Chair and Global Managing Partner, K&L Gates LLP

More Flights

Air service has been a major challenge for most of the last decade. Without nonstop service to Europe, Pittsburgh risked losing out in the global marketplace. A risk-sharing public-private partnership among the Allegheny Conference, Allegheny County, the Commonwealth of Pennsylvania and the Allegheny County Airport Authority helped convince Delta Airlines, despite the global recession, to begin flying nonstop from Pittsburgh to Paris in June 2009 – creating a gateway to Europe, the Middle East and beyond. Domestically, United Airlines launched new nonstop service to the West Coast, AirTran expanded its network and, in early 2010, JetBlue announced additional flights to Boston.

A New Interstate

The region expanded its interstate highway network with PennDOT’s designation of the Parkway West and Route 60 as Interstate 376 from Monroeville through Downtown Pittsburgh and north to I-80 in Mercer County. This culminated more than a decade of hard work by many partners, including the Tri-County Airport Partnership, staffed by the Conference. It is important because it makes it clear to site selection consultants and other business investment decision makers that our transportation systems meet their logistics needs – that our interstate highway system connects to Pittsburgh International Airport, to the Turnpike and to I-80.

Transit Reform

The Port Authority of Allegheny County completed a major redesign of its bus-and-rail network to make the system more effective and increase ridership. The move is the latest step in a series of changes undertaken since the Conference began working with the agency in 2006. The initial goal was to stabilize the Port Authority’s unstable financial situation. The second goal, accomplished in 2008, was for the agency to secure a fair and competitive new labor agreement. Now, implementing the comprehensive redesign of the Port Authority’s routes – the first since the agency began in the 1960s – will increase the amount of service provided to residents and will better match service to the needs of today’s economy.



Business Climate: Improvements in a Challenging Budget Year



*“Despite a particularly difficult budget year during which the economic downturn severely reduced state revenues, the new budget spends \$524 million less than the previous one. Throughout the unusually long budget process, we maintained our focus on continued improvement to our region’s competitiveness. Not only did we avoid any broad-based tax increases, which under the circumstances was an achievement in itself, we also achieved favorable outcomes for the corporate net income tax and net operating loss carryforwards. **These successes were possible through working with CompetePA, a statewide coalition made up of more than 130 businesses and organizations that speak with a unified voice about important business tax reform priorities.** Staffed by the Conference, the coalition collectively employs more than half the Commonwealth’s workforce, and is another great example of how the Pittsburgh region collaborates to help build a better business climate.”*

– Carlos Cardoso, Allegheny Conference Business Climate Committee Chair and Chairman, President & CEO, Kennametal Inc.

Increasing Carry-Forwards Helps Cyclical Industries and Start-Ups

The final state budget included an increased cap on net operating loss (NOL) carry-forwards, which makes it easier for start-up companies, those in cyclical industries and others to carry a greater amount of their losses forward to decrease current tax liability – an option that is all the more critical during difficult financial times. The current NOL cap, the greater of \$2 million or 12.5%, will increase to \$3 million or 15% in FY 2009/10, and \$3 million or 20% in FY 2010/11.

Increasing the Single Sales Factor Supports Expansion and Job Creation

We also strongly supported an increase in the sales factor formula – used to calculate the CNI tax payments – from the current 70% to 83% in FY 2009/10, and 90% in 2010/11. This increases the CNI tax’s emphasis on a company’s sales rather than its payroll or location, thereby encouraging investment and job creation rather than penalizing it. This improvement in the sales factor is the first since 2006 when it was increased from 60% to 70%.

Temporary Roadblock for the Capital Stock and Franchise Tax Phase-Out

Unfortunately, there will be a delay in the Capital Stock and Franchise Tax phase-out with the rate frozen at 2.89 mills for three years. We supported language inserted to smooth the retroactivity of these payments. Payments for 2009 tax liabilities were not due until the first quarter of 2010 and did not incur interest or penalties.

Civic Policy: Pension Reform is More Urgent Than Ever

Underfunded public pensions are a pressing national issue – but the problem is particularly severe in Pennsylvania. The most recent available data shows that Philadelphia and Pittsburgh are in the most severe trouble, with unfunded liabilities of approximately \$3.8 billion and \$500 million respectively – and these numbers are from 2007.

In the waning days of 2009, pension reform was front and center with the highly disputed “tuition tax” proposal – which would have imposed a tax on students attending colleges and universities within the City of Pittsburgh to help fund the City’s pension liability. Fortunately, cool heads prevailed, and the “tuition tax” was tabled.

Instead, under the leadership of Mayor Luke Ravenstahl, a coalition of universities, government and businesses has come together to seek lasting reforms. The Conference is ready to provide research and other assistance to this public-private coalition.

The challenges regarding pension reform remain real and must be addressed, not just for the city but for municipalities across Pennsylvania and for the Commonwealth government – including employees and teachers – as well.



*“The economic downturn has turned a bad situation into a looming funding crisis that will impact municipalities across the state. **An initial effort to defuse the pension time bomb clearly did not go far enough.** The Act 44 of 2009 legislation enacted some short-term measures but, in the end, maintained the status quo by omitting important cost containment measures. **Only further substantive legislative reforms can ensure that government entities can keep their retirement promises to employees while continuing to deliver necessary services and keeping taxes from rising.**”*

– Morgan O'Brien, Allegheny Conference Civic Policy Committee Chair and President & CEO, Peoples Natural Gas Company

Conference affiliate, the Economy League, has identified key tactics for reform, including such cost containment provisions as:

- state management of and control over severely distressed pension plans;
- no benefit plan enhancements permitted unless a plan is at least 90% funded;
- authorization of all municipalities to offer optional defined contribution plans to all employees; and
- benefits based on regular, base salaries but not on overtime, longevity, or other bases of compensation.

Urgent Reform Needed:

- 25% of the nation’s local government pension plans are in Pennsylvania.
- The majority are very small with high per capita administrative costs and low annual returns.
- Before the economic downturn, 190 plans in 169 municipalities had asset-to-liability funding ratios of less than 70%.
- Due to the economic downturn, municipalities’ contributions to pension plans will increase, but the magnitude of the increases will not be known until mid-2010.

Energy: Collaborating for Sustainable Energy Solutions

In September 2009, as G-20 leaders convened here, an unprecedented group of Pittsburgh-based energy companies and universities stepped forward to share their commitment to our growing energy economy. In an open letter in the *Pittsburgh Post-Gazette*, the leaders of 12 organizations acknowledged the growing global energy demand and pledged to find the solutions to the world's energy challenges together. "We believe that Pittsburgh will play a leading role in creating the new energy economy," they said.

Pittsburgh is well on its way toward becoming the nation's leading energy region and the provider of innovative energy solutions to the world. We can do so by leveraging our natural and human assets to engineer a 21st-century energy infrastructure and to address changing global energy needs. Our region has a critical mass of more than 700 companies in the global energy supply chain, plus innovation assets, spanning government, academic and corporate research & development. Our diversified energy economy includes a portfolio of energy sources, including natural resources such as coal and natural gas; engineering and manufacturing expertise in nuclear, solar and wind; and leadership in energy management, including intelligent building and smart grid technologies. Together, these regional assets provide a complete energy portfolio.

Already, our region's energy sector is:

- producing \$13.7 billion (more than 10%) of our Gross Regional Product;
- creating 105,000 direct/indirect jobs; and
- comprising 25% of 2009 business expansion announcements.

Just as important is a unique spirit of collaboration

Leaders across seven energy industries have come together to form the *Energy Alliance of Greater Pittsburgh*, a virtual organization co-staffed by the Allegheny Conference and Innovation Works. With a focus on sound public policy and economic development – from further developing critical industry cluster supply chains and investing in promising technologies and start-ups – the Alliance will develop and implement a strategy to grow the Pittsburgh regional energy industry.



"The Pittsburgh region's emerging leadership as a provider of diverse energy solutions – including natural gas – is a catalyst for widespread opportunities in extraction, supply chain development and technology-based innovation. Working together, the region's energy providers can create jobs, encourage investment and position our region at the forefront of creating a 21st-century energy economy."

– Murry S. Gerber, Allegheny Conference Board Member and Chairman, EQT Corporation



What's Next

A note from Allegheny Conference CEO Dennis Yablonsky

Yes, the Pittsburgh region is back in the game. To win it, we must stay focused on the critical issues that will determine long-term success or failure.



Dennis Yablonsky
CEO, Allegheny Conference on
Community Development

What do we have going for us?

Pittsburgh is setting the standard for a 21st-century economy. We've successfully engineered an economic transformation to create a strong foundation, standing on the strength and diversity of our five core industry sectors – advanced manufacturing, energy, financial and business services, health care and life sciences, and information and communications technology.

Perhaps better than anywhere else, Pittsburgh collaborates to leverage human capital to invent, commercialize and globalize new products and even entire industries. With 35 institutions of higher education – including two Tier-One research institutions, we capitalize on research, innovation and entrepreneurship and are advancing the industries of the future. Consider the convergence of life sciences and technology here that's advancing health care and saving lives, or the marriage of advanced manufacturing and technology that's growing our exciting regional robotics industry.

Pittsburgh welcomes newcomers with a distinctive setting, world class arts and culture and national leadership in riverfront redevelopment and green building. Our talented, highly skilled workforce is drawn to all of that and to the fact that it's eminently affordable here.

What's holding us back?

Our business climate is, especially Pennsylvania's high corporate net income tax rate, which is a red flag to employers considering relocation here. Our fragmented government structure increases the cost of doing business here, creating another obstacle. The underfunding of municipal pensions is a dire problem that still requires extensive reform and improved air service remains a high priority. We cannot succeed in the global economy without robust connectivity in North America and to the rest of the world.

Workforce may be our biggest challenge of all. Although total employment in the region will continue its upward trend, with more than 25,000 open positions despite the recession, our population is declining. Our domestic immigration rate is slow, our international immigration rate is close to non-existent and we need to do more to create opportunities for African-Americans.

The good news is we are in a much better position to address these issues than at any time in the past 30 years. Our economy is diverse and balanced, with five solid industry pillars supporting our future.

Our biggest opportunity in the near and long term is likely to be in delivering innovative energy solutions to the world. Our region has successfully built global industries before – glass, steel and health care – and we can do it again.

The People Behind The Progress

We extend our profound appreciation for the engaged leadership, dedication and hard work of our Board members, Regional Investors and other regional partners. Your time, talent and resources advance our agenda, improve our regional economic competitiveness and enhance our quality of life.

Because of your partnership and commitment, new generations can imagine – and enjoy – a bright future here.

Join the following groups of regional changemakers.

*Contact us today to become personally involved
in improving southwestern Pennsylvania.*

Allegheny Conference on Community Development

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