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2010 Annual Report

ALLEGHENY CONFERENCE ON COMMUNITY DEVELOPMENT

GREATER PITTSBURGH CHAMBER OF COMMERCE

PENNSYLVANIA ECONOMY LEAGUE OF SOUTHWESTERN PENNSYLVANIA

PITTSBURGH REGIONAL ALLIANCE

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.

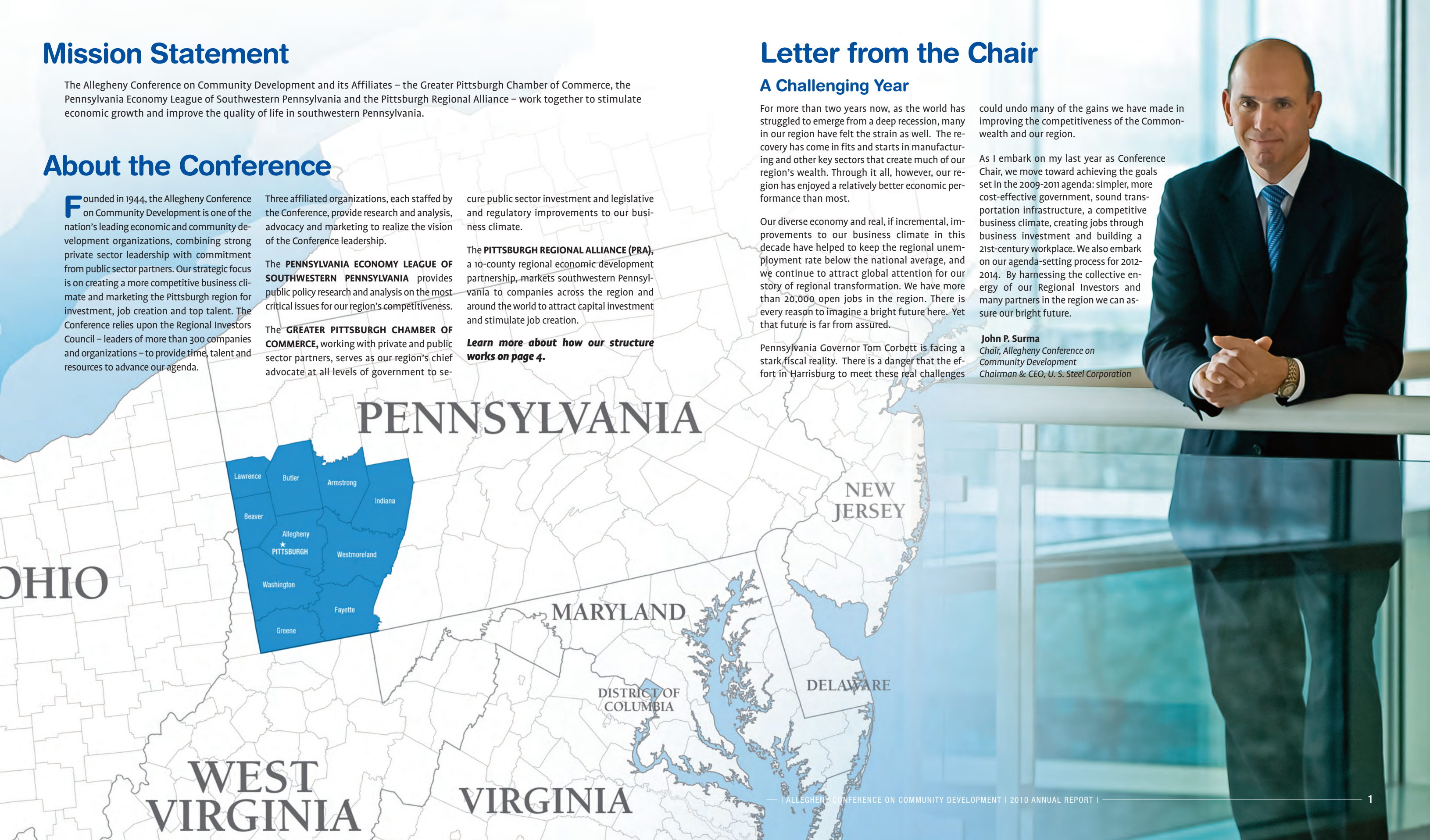
The **PENNSYLVANIA ECONOMY LEAGUE OF SOUTHWESTERN PENNSYLVANIA** provides public policy research and analysis on the most critical issues for our region’s competitiveness.

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 4.



Letter from the Chair

A Challenging Year

For more than two years now, as the world has struggled to emerge from a deep recession, many in our region have felt the strain as well. The recovery has come in fits and starts in manufacturing and other key sectors that create much of our region’s wealth. Through it all, however, our region has enjoyed a relatively better economic performance than most.

Our diverse economy and real, if incremental, improvements to our business climate in this decade have helped to keep the regional unemployment rate below the national average, and we continue to attract global attention for our story of regional transformation. We have more than 20,000 open jobs in the region. There is every reason to imagine a bright future here. Yet that future is far from assured.

Pennsylvania Governor Tom Corbett is facing a stark fiscal reality. There is a danger that the effort in Harrisburg to meet these real challenges

could undo many of the gains we have made in improving the competitiveness of the Commonwealth and our region.

As I embark on my last year as Conference Chair, we move toward achieving the goals set in the 2009-2011 agenda: simpler, more cost-effective government, sound transportation infrastructure, a competitive business climate, creating jobs through business investment and building a 21st-century workplace. We also embark on our agenda-setting process for 2012-2014. By harnessing the collective energy of our Regional Investors and many partners in the region we can assure our bright future.

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



The Pittsburgh World Tour 2010

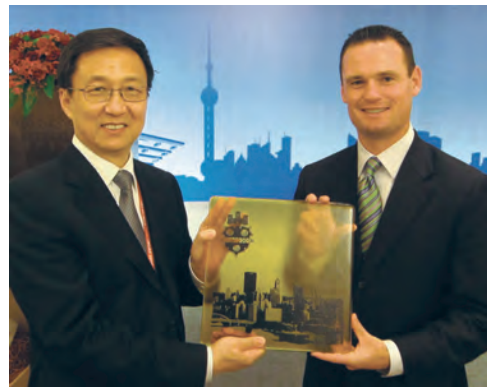
Enhancing The Buzz



It seemed that all roads led to and from the Pittsburgh region in 2010. Largely as a result of the Group of 20 leaders' summit in September 2009, the region hosted a record number of leadership visits – from city visits by Chambers of Commerce from across the United States to international visits by both dignitaries and journalists organized by members of 2009's Pittsburgh G-20 Partnership.

A Model Region

Pittsburgh's story of economic, environmental and quality of life transformation has attracted visits by regional leaders from across the United States before, typically one visit every year or two. In 2010, leaders from 10 regions called on Pittsburgh. They came from Baton Rouge, Cincinnati, Cleveland, Detroit, Dubuque, Harrisburg, Kansas City, Lexington & Louisville, Mobile and Nashville. Much of their focus was on Pittsburgh's unique mix of civic leadership and collaboration that encouraged its transformation.



Mayor Ravenstahl presents a plate, specially made by the Pittsburgh Glass Center, to Shanghai Mayor Han Zheng.

International Momentum

Our region is also attracting inbound international interest. Delegations from Toronto and Seoul visited in preparation for hosting the G-20 in their countries. During 2010 the region hosted visits by business decision makers from Egypt, Qatar, France, Brazil, Oman, Germany, Switzerland and the United Kingdom. And, along the way, Pittsburgh played North American host to World Environment Day, another result of G-20 exposure.

The region itself – through the leadership of the Allegheny Conference's marketing affiliate, the Pittsburgh Regional Alliance (PRA) – embarked on separate business outreach trips to Europe and Asia. Pittsburgh's "world tour" began in April with business investment outreach to Denmark and the United Kingdom to promote our strengths in energy and defense & security, and continued with the Pittsburgh Symphony Orchestra's (PSO) sold-out Tour of Europe 2010. During that tour we connected with business decision makers in Switzerland, Paris, Frankfurt, Luxembourg, Prague and Vienna.

"Doors are opening for the Pittsburgh region as never before. The PRA's collaboration with the PSO and our European outreach resulted in 10 promising leads for future investment in our region. In past years we would have been pleased to bring home two to three leads."

– Allegheny Conference CEO Dennis Yablonsky

Our fall schedule included visits to Shanghai, China and Seoul, as the South Korean capital prepared to host its G-20 summit. Shanghai Mayor Han Zheng extended the highly prestigious invitation to Pittsburgh Mayor Luke Ravenstahl to address the International Business Leaders Advisory Council (IBLAC) at its annual meeting. The 40-plus global CEOs participating in IBLAC – a number of whom are connected to companies with a strong Pittsburgh regional presence such as Alcoa, Bombardier and Siemens – are helping to guide the transformation of Shanghai, China's largest economic center.

"Shanghai and Pittsburgh share a story of cities that, in their own place and time, have had an opportunity to reinvent themselves and, in many ways, to shape the world. I am already looking forward to any future collaborations between Pittsburgh and Shanghai that might follow my first visit."

– City of Pittsburgh Mayor Luke Ravenstahl



Around World Environment Day, national journalist and other influencers cruised Pittsburgh's three rivers to explore the region's transformation.

Global Media Interest Continues

The PRA and VisitPittsburgh hosted domestic and international journalists during World Environment Day and for the inauguration of the CONSOL Energy Center, the first Gold LEED-certified indoor arena in the world. The PRA also engaged with Burson-Marsteller during 2010 to continue the global media buzz about Pittsburgh. Here are a few examples of the coverage the region received around the world.

- **Pittsburgh: From Steel Town to City of Creativity**
– Xinhua News Agency (China)
- **Funding and Social Capital are Key Factors in Financing Regeneration**
– Financial Times
- **An Alternative to California and Canada**
– Games Market (Germany)
- **Westinghouse Electric is Hiring, Despite Private Sector Employment Drop Nationwide**
– Fox Business News (broadcast)

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.



Education and Research

The region's intellectual capital includes 36 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.

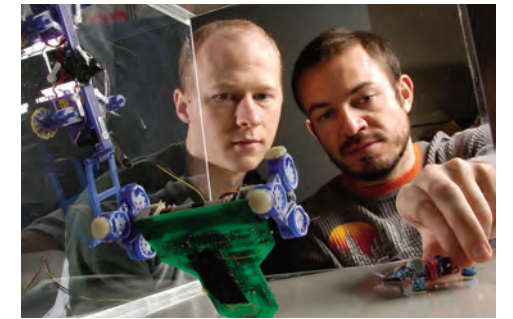
Health Care and Life Sciences

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.



Energy

A diverse and balanced portfolio is enhanced by Pittsburgh's development of sustainable energy solutions and components. The birthplace of the oil and gas industry with coal extraction expertise that dates back more than 250 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.



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.



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.



About the Allegheny Conference on Community Development

The Allegheny Conference on Community Development is focused on improving the economy and quality of life in the 10-county Pittsburgh region. Together with three affiliates – the Pittsburgh Regional Alliance (PRA), the Greater Pittsburgh Chamber of Commerce and the Pennsylvania Economy League of Southwestern Pennsylvania – the Conference advances a strategic vision framed by our Regional Investors to achieve sustainable prosperity.

How We Do It: Our Model

Through its unique combination of civic leadership, marketing, research & analysis and advocacy, the Allegheny Conference has initiated a process of continuous improvement for the Pittsburgh region:

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 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



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 long-standing 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.”

– Helen Hanna Casey, Greater Pittsburgh Chamber of Commerce Chair and President, Howard Hanna Real Estate Services

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 67-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 find solutions to the tax and regulatory challenges facing our region’s employers and advocate for change at all levels of government. *See page 12*

Business Investment

We are nationally recognized for our global outreach and project management, making the region a 10-county hub for economic development. *See page 10*

Civic Policy

We roll up our sleeves and work with elected officials to streamline our government, reducing duplication and improving its responsiveness. *See page 13*

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 6*

And an emerging, cross-cutting opportunity...

Energy

We’ve established a first-of-its-kind collaboration across energy sectors to keep the Greater Pittsburgh region at the forefront of innovative and sustainable energy solutions. *See page 14*



WORKPLACE:

ImaginePittsburgh.com
Takes Career Education
(and Excitement) to
New Heights

"At LANXESS, our employees are our most valuable asset and we need to continue to develop a pipeline of educated, hard-working and dedicated young people to further our growth and the growth of companies across the Pittsburgh region. The Allegheny Conference's Workplace agenda is focused on three things: First, educate the people who need the jobs. We need an accessible workforce in which qualified applicants and hiring employers can more easily connect. Second, diversify the workforce; we're partnering with Vibrant Pittsburgh to work on that. Third, partner with our schools to better train the workforce of the future.

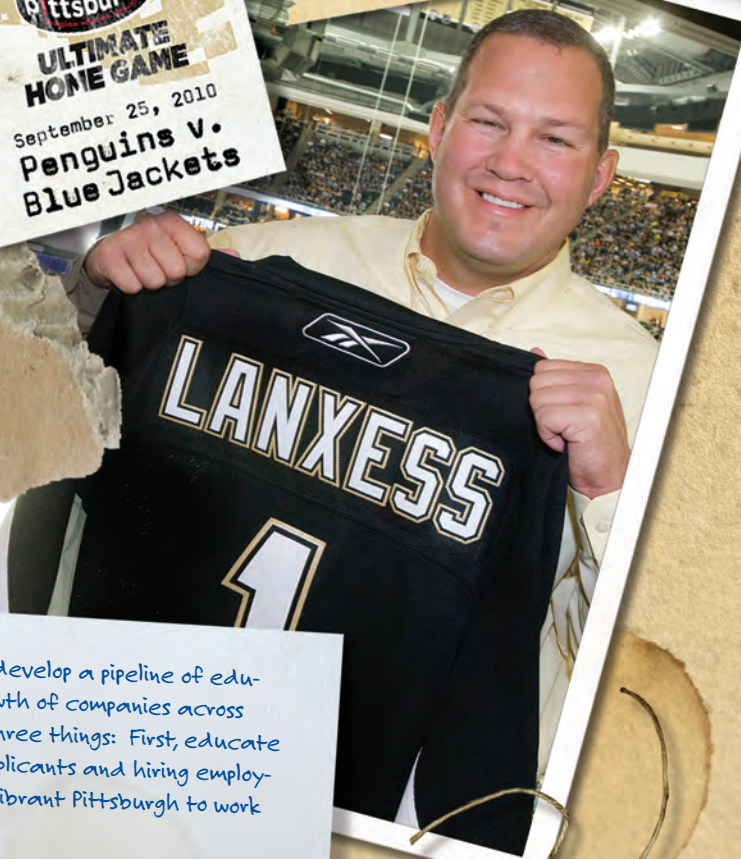
Retaining and attracting young people – and top-notch talent of all ages – is particularly critical in our region because the average age of our population and workforce is above the national average. To compete globally, we must educate, train, attract and retain our region's young people to fill the jobs that are here now, as well as the jobs that will be available when a generation of Baby Boomers begins to retire. By putting out the 'Now Hiring' sign now, we're positioning the region as a location of choice before the competition for talent resumes amid a recovering national economy."

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

NOW HIRING

In Pittsburgh!

Pittsburgh
ULTIMATE
HOME GAME
September 25, 2010
Penguins v.
Blue Jackets



In 2010, the Allegheny Conference formed an unprecedented partnership with the Pittsburgh Penguins and WestPACs (a consortium of regional career education professionals). The partnership aims to impart a simple, but powerful, message that the youth of the region need to hear: for the first time in a generation, the Pittsburgh region has more than 20,000 well-paying jobs available – and all are accessible in one place, the Conference's online career awareness and job search portal, ImaginePittsburgh.com. This hiring demand is expected to continue, but it's critically important that regional employers find the talent that they are seeking in order to continue their growth here.

The effort to make sure that employers can find that talent began with the Pittsburgh Penguins Ultimate Home Game presented by ImaginePittsburgh.com on September 25 at the new CONSOL Energy Center – itself a symbol of our green, tech-driven regional economy. Instead of season ticket holders pouring into the arena, it was thousands of

young people, ages four to 24, who scored free tickets through the Penguins and on ImaginePittsburgh.com.

Before and during the Ultimate Home Game, students jammed a career fair lining the arena's Level 3 Concourse featuring sponsors of the event, including Enterprise Rent-A-Car, PNC, LANXESS and U. S. Steel. The atmosphere was charged with the energy of promise about Pittsburgh as the place to live, work and play, and the energy was just beginning.

It was the first time any major league team had partnered with its hometown on such a ticket giveaway, and mutual goals were to treat fans to an exciting night of no-charge professional hockey, and – at the same time – raise awareness that Pittsburgh employers are hiring and exciting careers await here.



ImaginePittsburgh.com

WEEK

The Pens and the Columbus Blue Jackets faced off in the Ultimate Home Game exactly one year after Pittsburgh welcomed and wowed the world for the G-20 summit. There were so many activities in Pittsburgh during the anniversary week – from the Pirates' final home stand to the Pittsburgh Symphony's season premiere – that Mayor Luke Ravenstahl declared September 20 - 26, 2010 ImaginePittsburgh.com Week. This helped further to spread the word about this one-stop career awareness/job search tool that tracks down every online job posting within a 71-mile radius of downtown Pittsburgh, while providing a real-time review of regional employment opportunities.



Thousands of
Jobs Here Now!





pittsburgh regional compact™
connecting employers + students

Pittsburgh Regional Compact: Bridging the Gap Between Students and Careers

To continue to broadly communicate the fact that the Pittsburgh region is hiring, the Allegheny Conference, with the Three Rivers Workforce Investment Board and the Allegheny Intermediate Unit, are working together with a grant from the PA Department of Labor and Industry to distribute resources that connect schools to regional employers. School districts and employers will receive career education training and have access to an online directory of partners at the Pittsburgh Regional Compact website (www.pittsburghregionalcompact.org). This partnership provides real-world career education so students can understand and plan for their professional futures.

Regional employers pitch in with workplace tours, mentoring, classroom speaking, job shadows, serving as graduation project advisors, and more. Realizing the critical connection between education and their career interests, students can prepare to enjoy meaningful and successful futures in our region. Employers benefit, too, as the talent pipeline from which they can hire remains full of qualified candidates who want to live – and work – in southwestern Pennsylvania.



Just the Beginning

The “Ultimate Home Game” was the tip of the iceberg of an ongoing, focused campaign to make students aware of real-world career opportunities here.

As the next step in the career awareness and education initiative, 89 WestPACS-affiliated career education professionals – representing 27 college and universities from across the region – were hosted at a November event that engaged them with a panel of talent recruiters from regional businesses and organizations to discuss how students can be best prepared for the careers of tomorrow.

Summary of results for Ultimate Home Game Surveys:

Average age:	23
Average GPA:	3.45
Top fields of study:	Health Care, Business, Education

The majority of students are looking for:
full-time jobs, part-time jobs, paid/unpaid internships

The top 3 aspects of a job:

- Career advancement
- Flexible work schedules
- Professional development opportunities

So far, there have been a total of 24,147 responses, with 13,000 students signing up to be a part of the Ultimate Home Game and receive information on upcoming events.



vibrant
PITTSBURGH

A Gateway of Opportunity for All

To compete globally, the Pittsburgh region is going to need to field a diverse team of highly skilled, highly motivated individuals. Toward that end, the Allegheny Conference has partnered with Vibrant Pittsburgh, a new nonprofit dedicated to raising the region's profile as a gateway to opportunity for all, from disadvantaged and dislocated people in our region to those from across the country and around the world. Learn more at www.vibrantpittsburgh.org.

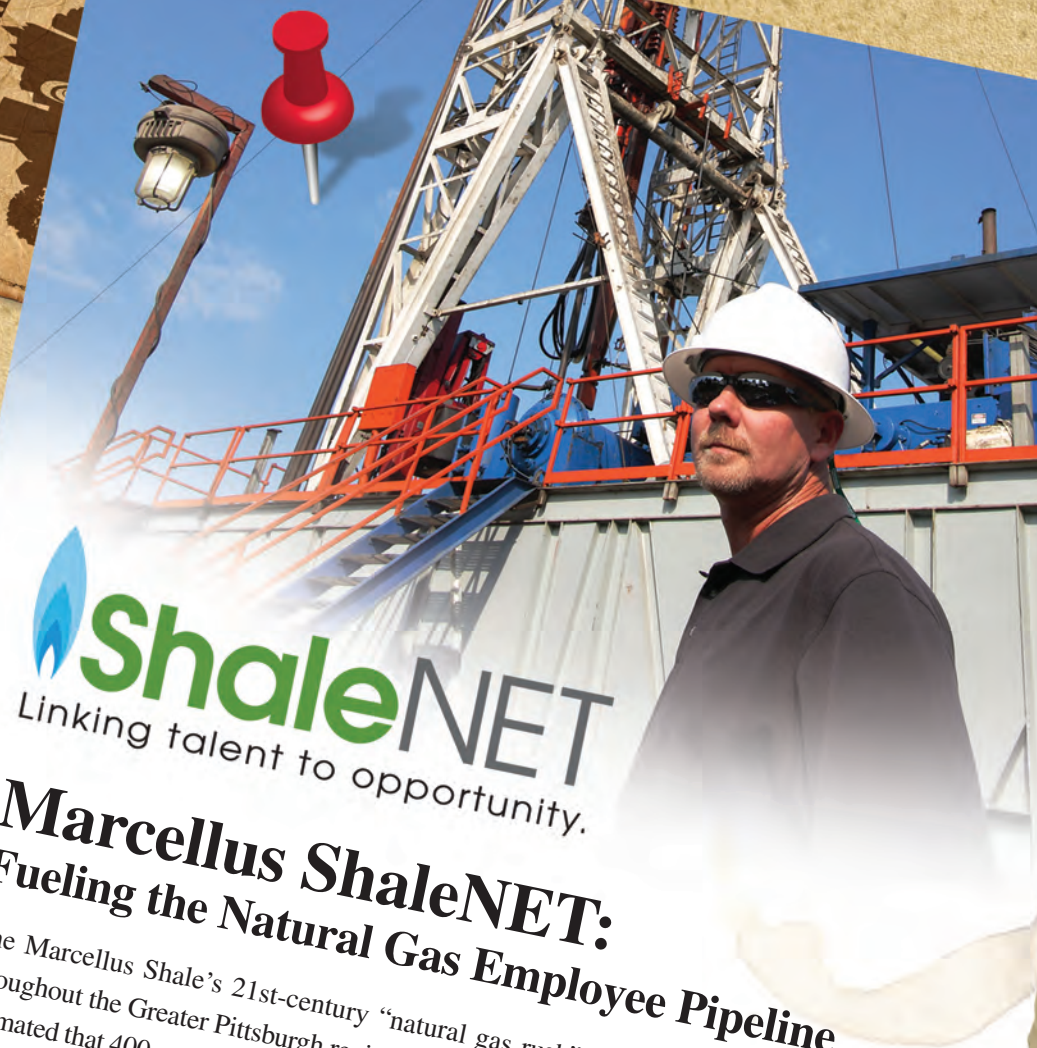


ShaleNET
Linking talent to opportunity.

Marcellus ShaleNET: Fueling the Natural Gas Employee Pipeline

The Marcellus Shale's 21st-century “natural gas rush” is creating thousands of jobs throughout the Greater Pittsburgh region (32 counties across portions of four states). It's estimated that 400 people working in almost 150 occupations are required to drill a single Marcellus Shale natural gas well.

Now, for the first time since the Marcellus Shale natural gas industry began to grow, workers in the multi-state Marcellus Shale footprint can receive standardized training for employment around this burgeoning energy resource. Marcellus ShaleNET, a comprehensive recruitment, training, placement and retention strategy for jobs in the Marcellus Shale gas industry, launched thanks to a \$4.9 million community-based job training grant (the largest awarded nationally in this federal funding opportunity) from the United States Department of Labor Employment and Training Administration. The program could potentially become a national model for workforce training/placement. Allegheny Conference staff facilitated the grant application effort.





Powering Prosperity: Diversification, Expertise, Innovation

The global economy continued its struggle to recover from the “Great Recession,” but in the Pittsburgh region, consistent, steady growth across five target sectors indicated that an economic rebound was underway. Balanced through diversification, our regional economy comprises advanced manufacturing, financial and business services, energy, health care and life sciences, and information and communications technology. Within this portfolio of target sectors is blended the best of our historic advantages and expertise with innovation’s bright promises for our future. This balanced, diverse portfolio is bringing prosperity to the Pittsburgh region.

Working to stimulate business investment and advance regional prosperity, the Pittsburgh Regional Alliance (PRA) Partnership is a coalition of elected officials, economic development professionals and representatives of the business and real estate communities across 10 southwestern Pennsylvania counties. The Partnership collaborates to attract new investment into the region and supports the growth of existing regional businesses. In fact, existing regional business expansions accounted for the majority of business investment deals, or “wins,” in 2010.

The following are examples of last year’s 38 project wins that were made possible through the PRA and its marketing, research and project management expertise. These professional services, alongside a unique collaborative approach to successful economic development, deliver results - even during challenging economic times.

Over the same timeframe, our economic development partners across the 10 counties chalked up an additional 234 announced expansions and relocations. The projects highlighted below represent those handled directly by the PRA.

ADVANCED MANUFACTURING

Alstom Grid
Existing business expansion
\$8M investment, 30 new jobs
Washington County

Alstom Grid, a 125+ year French company, inaugurated its newest U.S. operation – a disconnect switch manufacturing facility in Speers Industrial Park. The decision to locate in Washington County came after an extensive, competitive search. Critical site location factors

included the cost, availability and quality of the region’s workforce, proximity to customers and suppliers, and availability of suitable real estate near existing Alstom Grid operations.

Other notable advanced manufacturing wins:

Allied Technology
New business attraction
Natural gas equipment manufacturer
\$7.8M investment, 102 new jobs

Westmoreland County
Acutronic USA
Existing business expansion
Swiss designer/manufacturer of precision motion simulators
\$850,000 investment, 15 new jobs, 50 retained jobs
City of Pittsburgh, Allegheny County

“The global exposure that the Pittsburgh region has received is causing international and domestic companies to consider the advantages of locating here. We’ve enjoyed a boom of energy-related business investment – not just in the Marcellus Shale, but spanning several energy industries. The PRA’s 38 project wins represent a capital investment totaling \$120 million and 4,020 employment opportunities – 2,890 jobs created and 1,130 jobs retained. Half of these were energy sector wins. Our competitive wages, real estate and living costs are helping to attract not only energy, but other key sector companies, particularly those in financial and business services, where Pittsburgh is outperforming competitors including Charlotte, Chicago, New York and Philadelphia.”

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

INFORMATION & COMMUNICATIONS TECHNOLOGY

Smith Micro Software, Inc.
New business attraction
\$7M investment, 230+ new jobs
Allegheny County

A leading global software development and marketing company, California-based Smith Micro is establishing a new R&D center in McCandless Corporate Center, creating more than 230 well-paying jobs. The new site will house a data center and other professional operations. Smith Micro develops and markets mobile software products and services and an extensive line of PC software products.

Other notable information & communications technology wins:

CNI Guard
International business attraction
Manufacturer of a security system for municipal water systems
3 new jobs
Westmoreland County



Bossa Nova Concepts
Existing business expansion
Robotic toy startup
\$1.5M investment, 52 new jobs, 3 retained jobs
City of Pittsburgh, Allegheny County

eWON
International business attraction
Manufacturer of network routers for remote industrial uses
10 new jobs
City of Pittsburgh, Allegheny County

FINANCIAL & BUSINESS SERVICES

Automatic Data Processing, Inc. (ADP)
Existing business expansion
\$3.5M investment, 400 new jobs
Allegheny County



A leading provider of HR, payroll and benefits administration services, ADP opened its second suburban Pittsburgh facility during the summer of 2010 in the Pittsburgh International Airport corridor. The new facility houses ADP telesales employees who provide B2B solutions that improve customers’ efficiencies in their HR and payroll departments.

Other notable financial & business services wins:

Jones Lang LaSalle
Existing business expansion
Global commercial real estate services firm
\$1.4M investment, 151 new jobs, 216 retained jobs
City of Pittsburgh, Allegheny County

TRG Customer Solutions
Existing business expansion
Corporate support operation
120 new jobs
Allegheny County

BNY Mellon - Cash Management
Existing business expansion
Financial services firm
350 new jobs
City of Pittsburgh, Allegheny County

ENERGY

Axion Power International Inc.
Existing business expansion
\$1.1M investment, 75 new jobs
Lawrence County

The industry leader in the field of lead-acid-carbon energy storage technologies, Axion is expanding with a Commonwealth Financing Authority grant to fund two solar “trees” and an electric vehicle charging station. This system will be the first project in the U.S. that effectively integrates renewables, electric vehicle charging and energy storage, resulting in more effective utilization of renewable and utility load management.

Other notable energy wins:

Hunting Energy Services
International business attraction
Full service motor facility for the Marcellus Shale natural gas industry
\$2.8M investment, 18 new jobs
Westmoreland County

BOS Solutions
International business attraction
Solutions provider for drilling fluids treatment and recovery for the natural gas industry
\$1M investment, 12 new jobs
Fayette County

Valerus
New business attraction
Manufacturer of large compressors for the oil and gas industry
40 new jobs
Fayette County

HEALTH CARE & LIFE SCIENCES

Axellis
Existing business expansion
10 new jobs, 2 retained jobs
Allegheny County

A development stage medical technology company, Axellis provides a suite of tools (combining software, hardware and services) to enhance the quality and efficiency of radiotherapy treatment for cancer patients. U.K.-based Axellis announced in 2010 that it anticipated taking first steps toward international expansion in 2011 with the commercialization of a new compensator for Cobalt treatment.





Competitiveness

Creating a business climate that promotes economic investment and job creation

To enable prosperity, we are working to improve the competitiveness of our region for business investment and growth by promoting competitive business taxes and other business costs, as well as streamlined permitting and regulations.

Well-planned infrastructure investments make the Pittsburgh region more attractive for business investment and provide a high quality of life for residents. The Conference and affiliates work to ensure that our roads, transit, water and sewer systems, inland waterways, and aviation facilities are adequately managed and funded and their shovel-ready sites are available for development.

Local government that is efficient, cost-effective and meets 21st century needs is vital to our region's competitiveness. Over the past year, we have used our expertise to capitalize on the renewed appetite for increasing the fiscal accountability and effectiveness of our government entities.



“If we reduce spending to sustainable levels and make the reforms to the CNI structure that are long overdue, we have the opportunity to close the budget gap and to ensure that Pennsylvania comes out of this recession better positioned for prosperity than we’ve been in years.”

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

Business Climate

No Increases or New State Taxes on Businesses in Pennsylvania

For the first time in eight years, the Commonwealth’s state budget passed on time, and no new broad-based taxes were included. Hard work by the Conference and affiliates and numerous partners across Pennsylvania helped make it happen.

CompetePA, a coalition of businesses and organizations representing more than half the

private sector employment in Pennsylvania, defended against tax changes that would have made Pennsylvania less competitive, including combined reporting and royalty add-backs. In addition, the Capital Stock and Franchise Tax phase-out should proceed as currently legislated with a complete phase-out by 2014.

Significant challenges remain, including reform of the corporate net income (CNI) rate,

among the highest in the country and a barrier to business investment.

On the regulatory side, we adopted a fact-based approach toward a proposed federal environmental regulation, preventing an “impairment” designation for the Monongahela River for total dissolved solids that would have harmed industry and that was not supported by available scientific data.

Transportation and Infrastructure

Transit & Transportation

With the federal government’s rejection of Pennsylvania’s plans to toll Interstate 80, the Commonwealth has been left with a half-billion dollar shortfall in funding for transportation infrastructure and transit. In 2010 the Conference advocated for a long-term sustainable funding solution.



As the state deferred needed maintenance on roads and bridges, the Port Authority of Allegheny County neared a crisis. Despite sustained efforts to improve its operating performance, including modernization of its route structure, the transit authority faced a

funding shortfall. An eleventh-hour infusion of funds by the Rendell Administration enabled continued operation in 2011 at a reduced schedule. Without a statewide resolution to the transportation and transit funding issue, much deeper transit cuts appear likely in the future.

In early 2011, the Conference partnered with the Pittsburgh Downtown Partnership to help commuters tell their stories about the impact of the cuts to elected officials and highlighted employers’ concerns about the impact cuts will have on their workforce.

Competitive Air Service

We continued our support of the Delta Air Lines nonstop Pittsburgh-to-Paris flight, which has opened up a vital gateway to Europe, the Middle East and beyond. In summer 2011, Delta will expand the service to seven days a week, creating even more convenience in conducting global business.



Domestically, Southwest Airlines announced new nonstop service to Denver starting in June and JetBlue increased flights to Boston, bringing the total number of markets served by low-cost carriers to 14. Average ticket prices at Pittsburgh International Airport remained significantly below the national average.



“Given increasingly limited public resources, we face a challenge in maintaining adequate investment for transportation and infrastructure in the

Pittsburgh region. But it is a challenge we must take on to keep our business climate competitive.”

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

Civic Policy

Pension Reform

The Conference and affiliates focused on creating a sense of urgency about the issue of underfunded state and local pension funds. The Pew Center on the States found that a \$1 trillion gap exists between states’ pension liabilities and funds available to meet them. Pennsylvania’s strained pension funds remain an urgent issue which must be tackled in a meaningful, long-term way.

On the municipal level, too, momentum has grown. The Pennsylvania League of Cities and Municipalities “Core Communities in Crisis” task force and the Metro Chambers for Sustainable Cities each produced reports calling for legislation to contain rising pension costs..

In Pittsburgh, Mayor Luke Ravenstahl and City Council compromised on a plan to fund the city’s pensions, potentially averting an involuntary state takeover of pension fund management. More work will be needed, however, to resolve the city’s unsustainable pension situation.



“Act 102 is another step in improving overall government efficiency. It will help communities build a common future more quickly and easily.”

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

ACT 102 – Easing the Merger and Consolidation Process for Municipalities

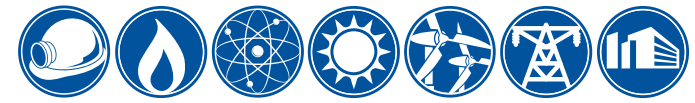
Municipalities in Pennsylvania that wish to consolidate will have an easier path thanks to approval of Act 102, which became law in November. The Conference worked closely with the Pennsylvania Department of Community and Economic Development, business organizations and other partners to secure legislative amendments to the merger

and consolidation statutes. It is a small but important step toward improving overall local government efficiency.

Ongoing outreach

The Allegheny Conference worked with The Pittsburgh Foundation and other regional partners to create and promote the Allegheny Forum, engaging more than 2,000 people from across the region to voice their opinion on local government reform issues. The partners presented their findings in December to a forum of bipartisan leaders from the Pennsylvania Senate and House of Representatives in advance of a new administration taking office.

IssuesPA.org, a statewide initiative of the Pennsylvania Economy League, relaunched in 2010 with a focus on competitive, local government issues such as municipal pension and binding arbitration reform.



energyalliance

OF GREATER PITTSBURGH

Collaborating for a Sustainable Future

Greater Pittsburgh is emerging as America's leading energy center with unmatched strengths in natural resources combined with being an employment leader across seven energy-related sectors - coal, natural gas, nuclear, solar and wind manufacturing, transmission & distribution and intelligent building.

In 2009, industry, government and higher education leaders came together to create the Energy Alliance of Greater Pittsburgh with a shared vision of growing our region's energy industries, creating jobs, attracting investment and advancing our global leadership in improving our environment. The Alliance is a strategic partnership of more than 70 members, guided by a CEO Advisory Group and jointly staffed by the Allegheny Conference and Innovation Works (IW). Members include traditional and alternative energy companies, global leaders in material science and intelligent building technologies, academic, corporate and government researchers and supply-chain providers.

Some examples of how the Alliance is working to achieve these goals are:

- Advocating for policies that will encourage these industries to flourish here;
- Encouraging commercialization of innovations spinning out of our government and university labs.
- Reaching out worldwide to attract business investment;



"Pittsburgh's approach to collaboration is a reason why it's been recognized as a successful model for transformation. Government, business, academia and nonprofits consistently reach out to work together to overcome the region's challenges and capitalize on the opportunities. The current collaboration among a number of usually competing energy-related industries is an example of how it can benefit everyone involved."

— Greg Babe, President and CEO of Pittsburgh-headquartered Bayer Corporation

CEO Advisory Group

Representing all seven of our region's energy-related sectors, this group provides the critical leadership, vision and resources that are driving the Alliance forward.

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The Alliance is tackling its objectives through four working groups. Here are some highlights of their 2010 accomplishments:

Policy and Advocacy

- Succeeded in making the importance of a portfolio approach to energy solutions a key strategy in the state and federal energy policy landscape.
- Continued to advocate for Marcellus Shale regulatory policy that is both environmentally responsible and supportive of business investment and development of the Shale.

Project Funding

- IW and Carnegie Mellon University received the \$1 million federal i6 Challenge award, given to the nation's six best ideas that bolster innovation. Our region's Agile Innovation System is expected to accelerate tech commercialization; form, fund and grow new spin-outs; and create knowledge-based energy industry jobs.

Marketing and Communications

- Received a \$4.9 million federal community-based job training grant for Marcellus ShaleNET, a new program to recruit, train and place local workers in the thousands of new, well-paying natural gas industry jobs.
- Developed a marketing concept for a public awareness campaign focused on promoting our wealth of diverse, high-quality energy-related career opportunities.

Innovation & Company Funding

- IW invested nearly \$1.2 million in 10 energy start-ups ranging from concept-stage enterprises to commercially available technologies.
- 2010 deal flow consisted of 102 energy-related companies with 55 continuing into 2011.



Rising above downtown's Market Square is one of PNC Financial Service's newest green buildings, 3 PNC Plaza. The company has more green buildings than any corporation worldwide.

What's Next?

Three Keys to Sustainable Prosperity for the Commonwealth

The new year brings with it a new set of challenges and opportunities. Here are the three keys to sustainable prosperity for the Commonwealth that the Allegheny Conference considers to have the greatest potential economic return.



Power Pennsylvania's economy through energy

We need to invest in a portfolio approach to capitalizing on our region's unique energy opportunity. We are the only region in the country that is both rich in natural resource AND is an employment leader across seven energy sectors spanning traditional and alternative sources and conservation & distribution. With energy demands expected to grow by 40% by 2030, it's clear that only a portfolio approach that pairs a robust mix of energy sources with improvements in transmission and distribution and in energy conservation will meet that need.

Regarding the Marcellus Shale, we need a comprehensive policy approach that encourages development in a reasonable, fair and environmentally responsible manner, includes solutions to regulatory and permitting issues, and considers the competitive implications of any new taxes or fees.

We need continued investment in training our workforce to fill the thousands of jobs being created by our region's "natural gas rush."

Create a competitive climate for business growth

Additional investments in site preparation and infrastructure improvement will also move us up the list for corporate investment. We also need to continue working to create a more competitive business tax climate to ensure a strong regional climate for business growth. That means:

- encouraging businesses, especially startups and manufacturers, to grow here, by moving to a 100% sales factor formula;
- eliminating the cap on net operating loss carryforwards;
- reducing the corporate net income tax rate; and
- completing the elimination of the capital stock and franchise tax.

The Commonwealth should also explore new ways of completing major infrastructure projects through public-private partnerships. With limited state and federal funds available to address pressing transportation infrastructure needs, Pennsylvania needs more creative ways to partner with the private sector and new laws to allow flexible use of public-private partnerships.

Sustain core communities

Pennsylvania must make a priority of restoring the fiscal health of core communities across the Commonwealth, the municipalities that are home to regional assets for education, health care, recreation, and arts and culture.

First on that list is defusing the "pension time bomb" at the municipal and state levels, while containing costs to prevent a

return to insolvency. We must move forward on the progress achieved this year in implementing the State Planning Board Governance Committee recommendations to remove barriers to boundary change.

Governor Corbett is constrained by a gap between expenses and revenue. To take on any new initiatives, he will have to focus on those with the highest potential return on investment for Pennsylvania taxpayers. These three keys to continued success will provide the highest return and assure continued progress toward sustainable prosperity for all of us.



Allegheny Conference CEO Dennis Yablonsky



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

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