

ALLEGHENY CONFERENCE ON COMMUNITY DEVELOPMENT
2012 ANNUAL REPORT

GREATER PITTSBURGH CHAMBER OF COMMERCE
PENNSYLVANIA ECONOMY LEAGUE OF GREATER PITTSBURGH
PITTSBURGH REGIONAL ALLIANCE

p!ttsburgh
imagine what you can do here.®

Mission Statement

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

About the Conference: The Whole Is Greater Than the Sum of the Parts

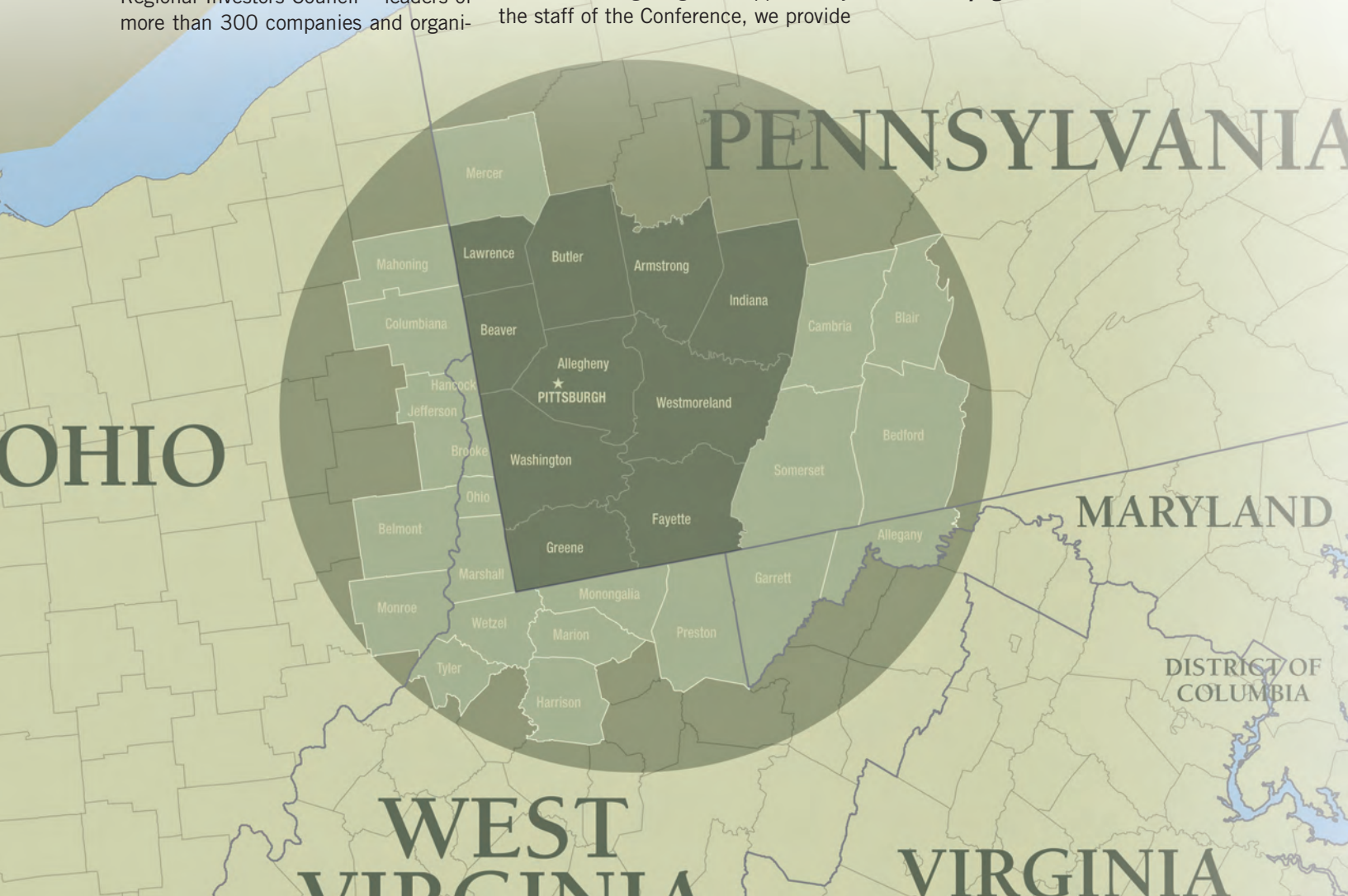
Founded in 1944, the Allegheny Conference on Community Development is one of the nation's leading economic and community development organizations, combining strong private sector leadership with commitment from public sector partners. Our strategic focus is creating a more competitive economic climate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

zations – to provide time, talent and resources to advance our agenda.

In January 2003, the Allegheny Conference formalized affiliations with the Greater Pittsburgh Chamber of Commerce, the then – Pennsylvania Economy League – Western Division and the Pittsburgh Regional Alliance. Today the unified organization works together to advance a shared vision for the future of the Pittsburgh region. Supported by the staff of the Conference, we provide

research, analysis and advocacy to identify and address competitive challenges and encourage business investment in an ever-improving place. Together we have become a more nimble, potent force for our region's businesses and people, and have earned international attention as a uniquely effective organization.

Learn more about how our structure works on page 2.



Pittsburgh: A Re-Imagined, Re-Made Region

FROM THE CHAIR

The Allegheny Conference and the Pittsburgh region are recognizing important milestones in 2013. For the Conference, this is the 10th anniversary of our affiliation with the Greater Pittsburgh Chamber of Commerce, the Pennsylvania Economy League of Greater Pittsburgh and the Pittsburgh Regional Alliance. For our region, this marks 30 years since the metro unemployment rate hit an all-time high of 18 percent.

Since then, the Pittsburgh region has been re-imagined and re-made. Today, more people are in our workforce than ever before. Our population is growing, and growing younger and better educated. Our diverse economy and high quality of life are attracting global attention.

The Allegheny Conference and its affiliates during the last decade have been focused on strengthening and growing the region. Its membership has grown to more than 300 Regional Investors, which better reflects private-sector employment across our 10-county region. Our unique model, one of continuous improvement, is delivering results.

In 2012, the Conference provided leadership to help pass important legislation to improve our region's economic climate, including the restoration of Act 47, public-private transportation partnerships (P3) for transportation projects, and creation of a tax credit to incentivize expansion of energy-related manufacturing. We forged and strengthened partnerships through groups such as the Coalition for Sustainable Communities and the TechBelt Initiative.

Our region's improved competitiveness is attracting investment. In 2012, the Pittsburgh Regional Alliance completed 42 economic development deals (or "wins") representing almost \$500 million in capital investment and a total job impact of 3,731. And the region was recognized for the third best performance in the nation for new expansion projects.

Yet much work remains. Topping our list is sufficient state investment in transportation infrastructure and transit to maintain our region's competitiveness. We must continue to pursue reform on binding arbitration, business taxes and public employee pensions. We must work to expand site development, nonstop airline flights and other measures that will enhance our economic competitiveness. And we must educate, train and attract enough skilled workers to fill jobs being created and jobs opening due to attrition.

Please join with me in redoubling our efforts to further strengthen and grow our region.

Sincerely,
Charles E. Bunch
*Chair, Allegheny Conference on Community Development
Chairman and Chief Executive Officer, PPG Industries, Inc.*



A Unique Model Delivering Continuous Improvements

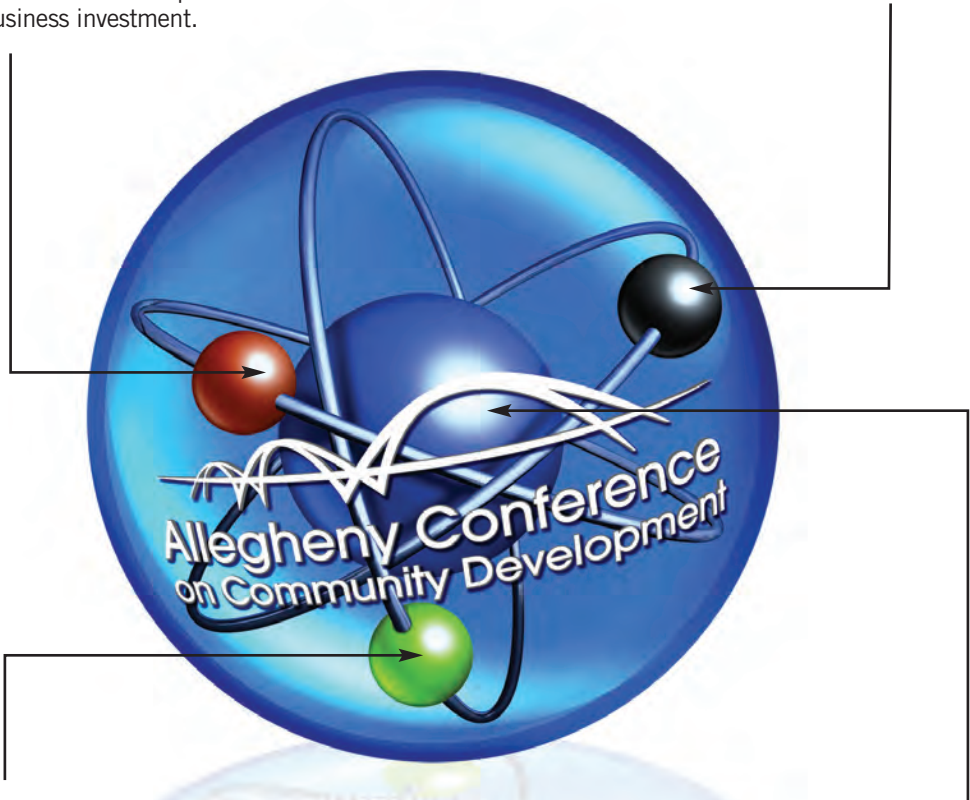
The Allegheny Conference on Community Development, under the leadership of its board of directors, supports and guides the activities of its affiliates.

Pittsburgh Regional Alliance

Marketing the benefits of doing business in southwestern Pennsylvania to companies around the globe which are expanding or relocating, the Pittsburgh Regional Alliance also supports the growth of existing regional employers. Its Partnership brings together elected officials and business, economic development and real estate professionals from 10 counties to foster business investment.

Pennsylvania Economy League of Greater Pittsburgh

Providing public policy research and analysis on the most critical issues affecting our region's competitiveness, the Economy League serves the business, civic and governmental leadership of southwestern Pennsylvania in support of improvements for living and doing business in the region.



Greater Pittsburgh Chamber of Commerce

Together with numerous partners across the Commonwealth, the Chamber advocates in Harrisburg, Pa. and Washington, D.C. for business climate improvements that enhance our region's competitiveness, encouraging employers to invest and grow here. These improvements help to make our region a national leader in terms of business investment and expansion.

Regional Investors Council

Truly engaged leadership and successful public-private partnerships sustain and develop regional prosperity and energize the Conference itself. More than 300 regional employers compose the Regional Investors Council. Together the Council imagines better things for our region, puts action behind words and makes a real difference for the future.

Resilience Through Diversification

The Allegheny Conference and its affiliates work to strengthen five key industry sectors



Advanced Manufacturing

Top manufacturers like Alcoa, Allegheny Technologies, Bayer, Calgon Carbon, Eaton Corp., Kennametal, Koppers, LANXESS, Mine Safety Appliances, NOVA Chemicals, PPG Industries, RTI International Metals, U. S. Steel and Westinghouse are here. Smaller precision tooling and machining companies meet global demands for the components that keep the world's machines humming.

Energy

Pittsburgh is the new center of American energy – a leader in technology, innovation and supply chain related to production, distribution and efficient use of energy. The region is home to more than 800 companies in the global energy market, including Aquatech, Chester Engineering, Chevron, CONSOL, EQT and Westinghouse. An estimated \$1 billion is invested annually in energy-related research, much of that generated by the National Energy Technology Laboratory in South Park.



Financial and Business Services

Global institutions with headquarters or major business units here include BNY Mellon, Citizens Bank, Dollar Bank, Federated Investors, First Niagara and The PNC Financial Services Group, Inc. 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.

Healthcare and Life Sciences

Pittsburgh's health services sector, employing almost 190,000 people, builds on a legacy of biomedical innovation to create a robust network that is cultivating lifesaving technologies, medical device advances, regenerative medicine and pharmaceuticals. The University of Pittsburgh Medical Center (UPMC) has grown into the region's largest employer and an \$8 billion global healthcare enterprise. Bayer HealthCare, GlaxoSmithKline Consumer Healthcare, Mylan and West Penn Allegheny Health System are also part of this sector.



Information and Communications Technology

Nearly 1,500 technology firms including ANSYS, Apple, Black Box, Confluence, Google, Intel and Mastech are here and employ some 25,000 people. A tech-savvy talent pipeline and robust network of organizations are supporting and financing innovation, which is helping Pittsburgh's knowledge-based economy to thrive.



Pittsburgh Region Has Strength in Numbers: Sectors, Partners, Investment Deals

There is strength in numbers in the Pittsburgh region when it comes to business investment. Five diverse industry sectors are pillars of its economy – generating employment, attracting investment and contributing to the gross regional product. Some sectors’ performances may falter during turbulent economic times, while others excel. The overall effect is balance and stability.

Additionally, the region has hundreds of partners at allied organizations across 10 counties. Fifty of these compose the Pittsburgh Regional Alliance (PRA) Partnership – professionals and leaders from the public and private sectors who work together to create a climate that’s competitive for business investment, and to generate leads and secure deals.

The PRA’s 42 regional economic development deals or “wins” of 2012 provide tangible evidence of strength. They represent millions of dollars invested in building up the region’s business landscape with bricks and mortar for facilities of all sorts and sizes, as well as creating and maintaining jobs.

The following are examples of last year’s wins, made possible through the PRA and its marketing, research and project management expertise. These professional services, alongside its unique economic development partnership, position Pittsburgh as an attractive place to do business – a region where the community is committed to helping investors achieve success.



“The project deals secured by the PRA in 2012 represent capital investment approaching \$500 million and 3,731 jobs – 1,955 created and 1,776 retained. The team succeeded at securing significant investment because they intimately know the region’s assets and are skilled at selling them. At the same time, they’re measuring the region’s competitiveness by routinely engaging with domestic and international companies to understand their needs, sharing feedback and advocating for improvements to enhance competitiveness. Our economic development partners share this vision and work in concert to maximize the entire Pittsburgh region’s investment potential and increase regional prosperity.”

– David J. Malone, President and CEO, Gateway Financial Group Inc.
Allegheny Conference Vice Chair, Pittsburgh Regional Alliance Partnership Chair



INFORMATION AND COMMUNICATIONS TECHNOLOGY

Mendtronix, Inc.
Attraction
25 new jobs
Westmoreland County

Mendtronix, the nation’s largest commercial AV service provider, opened a 15,000 SF state-of-the-art repair depot and service center in Latrobe. The new facility, the company’s third in the U.S., is ideally

situated to achieve faster repair turnaround times and service to its customers in the Northeast and Midwest. The expansion will also enable Mendtronix’s growth into new and existing AV services for the projection, digital signage and kiosk industries.

The Resumator
Expansion
12 new jobs; \$400,000 investment
Allegheny County

Recruitment software company, The Resumator, provides integrated, easy-to-use recruiting tools and social media features to make finding, sorting and reviewing job applicants easy. Its platform is prized by companies without big HR departments that need to ramp up staffing quickly, and is used by such notable customers as HootSuite, Mash-

able, Instagram and Tumblr – as well as both 2012 presidential campaigns. The company, a 2009 graduate of Innovation Works’ startup accelerator program AlphaLab, is transitioning from startup to growth mode with its move from incubation space at the Riverside Center for Innovation into 8,000 SF of office space in Ross Township.



MANUFACTURING

Hörmann Flexon, LLC
Expansion
35 new employees;
\$5 million investment
Washington County

Family-owned German company Hörmann Flexon, LLC is constructing a state-of-the-art 68,000 SF facility in Starpointe Business Park in Burgettstown. The operation will produce high-performance industrial doors for customers all over the U.S. The new plant has space to triple in size should production grow. Hörmann Flexon, which currently employs 30 individuals, expects to more than double its workforce when it begins operations in the new facility.

Hydrotechnik GMB
International attraction
15 new employees;
\$2 million investment
Allegheny County

German manufacturer Hydrotechnik GMB has established its first U.S. presence with a sales office in Sewickley. From this location the company will develop its North American strategy and



set up its U.S. distribution network. Hydrotechnik, which manufactures diagnostic tools for hydraulic equipment for metals manufacturers and mining companies, selected the region for its proximity to its U.S. customer base, as well as access to new customers in energy-related markets, specifically water and natural gas.

ENERGY

Aquion Energy
Expansion
341 new jobs; \$70 million investment
Westmoreland County



Innovative grid-level battery maker Aquion Energy is opening a full-scale manufacturing facility at RIDC Westmoreland. The company will move its 70 employees from its current headquarters and low-volume manufacturing space to the new facility and expects to create more than 300 high-tech manufacturing jobs. Aquion makes environmentally friendly sodium-ion batteries about the size of a breadbox, weighing approxi-

mately 50 pounds. They can be strung together to create modules of varying sizes to supply power to large electrical grids. They also can store energy, which helps stabilize electrical grids as more non-traditional, renewable sources of power come online.

HEALTHCARE & LIFE SCIENCES

Mylan, Inc.
Expansion
200 new jobs; \$60 million investment
Washington County

Citing “transformational and phenomenal growth” in recent years and anticipated future growth, global pharmaceuticals company Mylan announced plans to build a new corporate headquarters in Southpointe II in Cecil Township. The new 280,000 SF, five-story, LEED-certified, Class A office building is expected to be completed in 2013.

FINANCIAL AND BUSINESS SERVICES

United Lender Services
Expansion
200 new jobs; \$14 million investment
Allegheny County

United Lender Services (ULS), a national mortgage services firm that offers products and services for all types of real estate transactions, has expanded into 48,000 SF of space in Park West One in the Parkway West corridor. The relocation enables the company, which is headquartered in the region, to staff up its operation by adding 200 new jobs.

Working For Sustainable Prosperity

2012 was the first year of a three-year agenda that focuses on three strategic priorities in pursuit of sustainable prosperity.

ENHANCING OPPORTUNITY

Making the most of our competitive advantages by positioning the Pittsburgh region as a global location of choice for individuals and businesses.

Nurtured Business Growth; Linked Pittsburghers to Jobs

- Secured the 42 economic deals (“wins”), representing nearly \$500 million in capital investment and total job impact of 3,731 (1,955 created; 1,776 retained).
- Saw the Pittsburgh metro named No. 3 for business investment in the U.S. and No. 1 in the Northeast by *Site Selection* magazine, which also named the Pittsburgh Regional Alliance as a Top Ten U.S. economic development group.
- Took leadership role in convening partners to develop and secure \$14.9 million in new federal funding for an expansion of the training program ShaleNET.
- Completed analysis of energy industry jobs through 2020, identifying 14 high-demand occupations.
- Liaised among Shell Chemicals and regional stakeholders in support of a proposed petrochemical complex in Beaver County that would create thousands of jobs and could attract significant related investment.

Generated National and International Attention through Strategic Communications and Collaborations

- Raised the region's profile as a business investment location through efforts such as an inbound capital markets and site consultant tour, an international real estate conference and outreach missions with Governor Tom Corbett and key institutions.
- Generated dozens of stories showcasing the Pittsburgh region as a clean, green destination for tourism and energy-related business and innovation through a “Green Pittsburgh” tour with 16 national and international journalists.
- Attracted coverage through media relations outreach in outlets including *The Wall Street Journal*, *USA Today*, Bloomberg News, National Public Radio, *Architectural Record*, *Site Selection* and *fDi* (Foreign Direct Investment), a *Financial Times* publication).
- In partnership with Vibrant Pittsburgh, VisitPittsburgh and numerous others leveraged “Best of the World 2012” ranking by National Geographic *Traveler* to raise awareness. Targeted more than 10,000 young visitors, including participants in the National Society of Black Engineers conference, the Intel International Science and Engineering Fair and the One Young World Summit.

STRENGTHENING COMMUNITIES

Working to reduce disparity and remove government barriers to community vitality.

Advocated for Transportation and Infrastructure Improvements

- Supported development of an agreement among the Corbett administration, Allegheny County, the Port Authority and organized labor to prevent crippling transit cuts.
- Worked with the Allegheny County Airport Authority to extend nonstop air service to Paris through the 2013 travel season and to add nonstop service to Houston and West Palm Beach.
- Helped pass P3 (Public-Private Transportation Partnership) legislation and the federal transportation reauthorization bill to support such projects as Oakland-Downtown bus rapid transit.

Worked for More Efficient, Fiscally Healthy Government

- Helped pass legislation restoring Act 47 provisions requiring arbitrators to consider distressed municipalities’ fiscal condition in crafting labor contract awards to police and firefighters.
- Established a blue-ribbon panel to develop recommendations to promote greater intergovernmental cooperation between ALCOSAN and its 83 partner municipalities. Recommendations released in 2013.
- Served on Allegheny County Executive’s Vision Teams on critical issues including water quality and transportation infrastructure.
- Supported the expanding Coalition for Sustainable Communities (CSC), a statewide alliance of business and local government associations helping communities address increasing economic and financial challenges.
- Continued (with CSC) to pursue Act 111 (binding arbitration) and municipal pension law reform to strengthen fiscal health of communities.

ENERGIZING TOMORROW’S ECONOMY

Building our economy and improving our environment.

Helped Improve Business Climate

- Supported approval of tax credits to incentivize expanded energy-related manufacturing, spur hiring and job creation and redevelop historic urban cores.
- Worked to continue Capital Stock and Franchise Tax phase-out and supported institution of a single sales factor formula to encourage investment and manufacturing job growth.
- Supported reforms to the Pennsylvania Department of Revenue tax appeals process and supported unemployment compensation reform to restore the system’s solvency and result in predictable and less costly payments to employers.
- Supported passage of Act 13, which provides a comprehensive framework for development of the Marcellus Shale in a productive, responsible manner.
- Established Healthcare Competitive-ness Initiative to monitor near-term developments in the insurer and provider markets; completed benchmarking effort.

Promoted Career Opportunities and Innovation within the Energy Sector

- Executed successful campaign to promote public awareness of energy sector career opportunities, innovation and thought leadership through the Energy Alliance of Greater Pittsburgh. The “*Energy to the Power of Pittsburgh*” campaign drove 60,000 jobseekers to employers through PowerOfPittsburgh.com, and promoted the sector to 21 million people worldwide through the web, broadcast, specialized publications and earned media.

Forged and Strengthened Regional Partnerships

- Helped to lead Power of 32 follow-up actions to design and develop both a new regional site development fund and a regional venture capital “fund of funds” for innovation.
- Teamed with the Great Lakes Metro Chambers Coalition to advocate for the \$105 billion fully-paid-for federal transportation reauthorization bill.
- Chaired the TechBelt Initiative, a partnership spanning from Cleveland through Pittsburgh to Morgantown that secured a \$30 million federal grant to establish a National Additive Manufacturing Innovation Institute.



ShaleNET

Linking talent to opportunity

Innovative ShaleNET Program Expands Geographic, Programmatic Reach

In 2010 the Allegheny Conference led the development of ShaleNET, a comprehensive recruitment, training, placement and retention program for jobs in the oil and natural gas industry throughout Pennsylvania, Ohio, New York and West Virginia. The \$5 million federal grant for that program, implemented through a partnership led by the Westmoreland County Community College and Williamsport's Pennsylvania College of Technology, has helped to put more than 2,000 people to work.

Working with our partners, in September 2012 the U.S. Department of Labor's Employment & Training Administration announced a new \$14.9 million grant to expand the program to five states, with additional hubs in Texas and Ohio. In addition to greatly extending the reach of Pennsylvania's existing ShaleNET program, the second award affirms Pennsylvania's leadership role in energy workforce development. Four hub colleges will develop standardized curriculum for widely employed occupations such as process technicians, petroleum technicians, instrumentation and electronics technicians, pipeline technicians and industrial maintenance technicians – all among the 14 critical jobs identified in our energy workforce analysis.

14 "Target Jobs" Highlighted on WPXI

Regional Investor WPXI/Cox Broadcasting produced *Take this Job and Love It*, an hour-long primetime TV special on the 14 critical jobs identified in our energy workforce analysis.



Preparing the Pittsburgh Region for Energy Careers, Resurgent Manufacturing

The Pittsburgh region is home to the nation's first oil and gas wells, its first commercial nuclear reactor, a historically rich coal seam and now the expansive Marcellus Shale natural gas play. In recent years we have emerged as the new center of American energy, with nationally leading strengths across seven energy industries including coal, natural gas, nuclear, solar, wind, transmission and distribution, and intelligent building.

An occupational analysis commissioned by the Allegheny Conference and the Energy Alliance of Greater Pittsburgh identified 14 "Target Jobs" in seven energy sectors and the manufacturing supply chain across 10 counties. Eight of the 14 require a certificate and/or a two-year degree and five require a four-year degree. Only one occupation requires just a high school diploma or GED.



In Greater Pittsburgh's 32 counties, the energy sector has an annual \$25 billion direct and indirect economic impact, representing 15 percent of its economy, according to the Pennsylvania Economy League of Greater Pittsburgh, the Allegheny Conference's research affiliate. More than 60,000 people are employed in direct energy jobs at 1,700 establishments. And upwards of \$1 billion in energy-related R&D is made annually



through the region's companies, universities and such government entities as the National Energy Technology Laboratory (NETL) and Bettis Atomic Lab.

This all has sent positive ripples across our economy and kept us buoyant through a national recession. But challenges are on the horizon in our ability to connect local people with the skills needed to fill jobs that are available now, and the many more to come.

The employers surveyed expect demand for talent to fill the "Target Jobs" to grow, and competition for them to be felt across other sectors, especially advanced manufacturing. Employers could see tens of thousands of openings between now and 2020, with about 60 percent of these openings the result of Baby Boomer retirements and normal attrition. *And that's just among these 14 occupations.*

The Allegheny Conference and the Energy Alliance will continue to bring attention and engagement to this challenge, but business must lead. Employers must do a better job of marketing these as high-paying, rewarding careers, creating and supporting partnerships with and



among regional secondary, technical and community colleges, and providing learning tracks for the in-demand jobs that include job shadowing and internships. To get involved, contact Conference Senior Vice President Laura Fisher at Workplace@AlleghenyConference.org.





Diversity Matters: Building a Robust Workplace; Elevating People

The Allegheny Conference believes that a diverse workforce is essential to the ongoing economic vitality of the Greater Pittsburgh region. We must attract, retain and elevate people of all backgrounds in work environments that are inclusive and welcoming.



We are working with Vibrant Pittsburgh, a coalition of employers, educational institutions and nonprofits, to help people of diverse backgrounds to identify quality job opportunities across our five key sectors. Vibrant Pittsburgh helps connect people with jobs directly through its employer members (all of which are Allegheny Conference Regional Investors) and through OppsPlace, an online site that brings together qualified minority job seekers and businesses with Fortune 100 companies interested in hiring or contracting.



The Pittsburgh Impact initiative is continuing its work to help local companies to thrive. In addition to its efforts to support the conclusions of research pioneered by the Team Pennsylvania Foundation and the Pennsylvania Department of Community and Economic Development, the Pittsburgh Impact initiative has sharpened its focus to three major areas:

- Continuing the development and promotion of systems such as BuyPittsburghFirst.com (linking local buyers to local suppliers to keep more resources in the region's economy) and BusinessQuick-Guide.com (connecting local companies to the region's valuable economic development resources);
- Presenting educational opportunities to local companies around the critical issues of private equity and exit planning to ensure that businesses that have grown in Pittsburgh continue to create jobs in our region;
- Leading a nationwide Open Innovation research project – being conducted by RIC member 113 Industries – to identify programs that have successfully nurtured entrepreneurship in the African-American community, and working with a local group of African American leaders to identify and implement the most applicable programs in the Pittsburgh region.

The Pittsburgh Region in 2013: Re-Imagined, Re-Made

In 2013, the Pittsburgh region marks the 30th anniversary of its worst economic crisis, a year in which metro unemployment hit a record high of 18 percent. Three decades later, the region has transformed itself into a diverse, stable economy fueled by knowledge, technology and innovation, with the largest workforce in its history. Part of that makeover included strategic investment in arts and culture and outdoor recreation.

The Allegheny Conference and its affiliates – in partnership with VisitPittsburgh, Vibrant Pittsburgh and others – will celebrate our 30-year transformation story throughout the year through such events as the dedication of the iconic fountain in Point State Park and the soon-to-be-completed Great Allegheny Passage biking and hiking trail that links Pittsburgh to Washington, D.C.



The Conference will unveil its redesigned career-awareness portal and job search engine, ImaginePittsburgh.com, which markets the region as a great place to advance a career and build a life. Launched to build awareness of the 250th anniversary of the naming of the city of Pittsburgh, it was enhanced in 2008 with a regional job search engine – unique in the nation. The site was later retooled to focus on regional job opportunities and talent retention of college graduates. In 2012, the site re-

ceived 55,000 unique visits from as close as Carnegie, Pa. to as far as India, China and Russia.

Today young college-educated professionals are increasingly choosing Pittsburgh as a place to launch their careers, even as Regional Investors Council members need to attract more mid-career talent. As a result, another ImaginePittsburgh.com update is underway, to be unveiled in summer 2013. The redesigned site will include content from Vibrant Pittsburgh to highlight the Pittsburgh region as a diverse, welcoming place that's big enough to be fun, but small enough for an individual to make a difference.



In the meantime, the Conference has been seeding its online attraction and retention efforts with a robust social media strategy that includes our blog, ImaginePittsburghNow.com, which is a Google News source that averaged 4,000 unique visitors a month in 2012. Our Twitter feed, ImaginePgh, has more than 7,000 followers; our 200 videos at YouTube.com/ImaginePgh were viewed nearly 18,000 times in 2012 and posts to Facebook.com/PittsburghRegion typically garner hundreds of viewers each.



Energizing Tomorrow's Economy

The Pittsburgh region is emerging as the new center of American energy. But energy leadership is nothing new here. In 1859 Col. Edwin Drake struck oil in Titusville, just 100 miles to the north, and set in motion a chain of events that made possible the modern world – from the automobile to powered flight and the petrochemical industry – all within 50 years. Drake could never have predicted the outcome of his innovation, nor could he have foreseen the many innovations that came as a result.

In 2004, less than nine years ago, Range Resources struck gas in the Marcellus Shale in Washington County. In many ways we are still at the beginning of what that will mean for our region, the nation and the world.

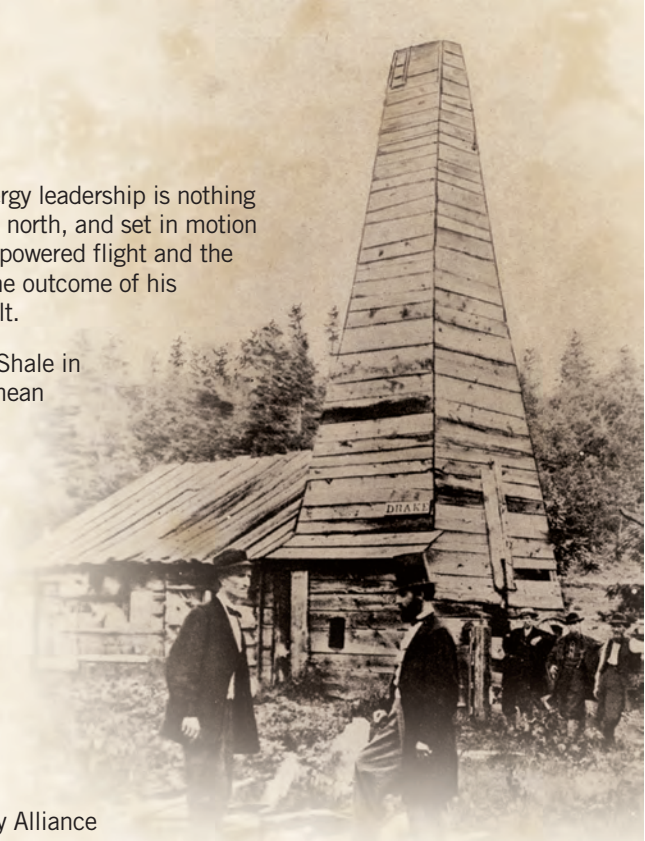
Put another way, it is 1868 all over again.



“No one person or organization can predict the future, but together we can chart a course and find ways to make the most of our natural and human resources while protecting and improving the environment. Our natural tendency to innovate and collaborate is the true Power of Pittsburgh.”
– Morgan O'Brien, President and CEO, Peoples Natural Gas
Incoming Chair, Greater Pittsburgh Chamber of Commerce

To this end, the Allegheny Conference and Innovation Works organized the Energy Alliance of Greater Pittsburgh. It consists of more than 100 organizations representing the region's seven energy-related industries – coal, natural gas, nuclear, solar, wind, transmission and distribution, and intelligent building – as well as their supply chain. Since 2009 the Energy Alliance has worked to increase the scale of this sector and encourage investment to create jobs.

Through the leadership of the Greater Pittsburgh Chamber of Commerce, many of these organizations have joined the “Friends of NETL” coalition. They are supporting the mission of the National Energy Technology Laboratory, the nation's foremost center for fossil fuel-related research. To learn more, contact Senior Vice President Ken Zapinski at kzapinski@AlleghenyConference.org



Infrastructure: The Foundation for Sustainable Prosperity



The Allegheny Conference is nearing its 70th anniversary. Incorporated from the Committee for Postwar Planning in 1944, the organization became the model for public-private partnerships to follow. Best-known for the successful effort to control the smoke that blackened Pittsburgh's skies (a priority that continues to this day through our support of the Breathe Project), the Conference set three other priorities for the future, all related to infrastructure.

In addition to air, the Conference focused on water, championing a regional sanitary sewer system and enhanced flood control. And, of course, there was urban redevelopment. Today providing clean air and water and infrastructure to support economic development is as important as ever. So is ensuring that roads, bridges and public transit are safe and reliable.

Drawing on the region's strong industry base of 3,000-plus water industry companies, the Allegheny Conference through the Pittsburgh Regional Alliance continues its work as a founding partner of the Water Economy Network. That includes helping existing businesses access new water-related opportunities and encouraging new business ventures and job creation.

Stronger collaboration and greater integration of services among wastewater management entities can deliver better services and better water quality for residents, businesses and communities. Those are the findings of a high-level stakeholder panel which the Allegheny Conference assembled at the request of the Allegheny County Sanitary Authority, or ALCOSAN. The panel developed and evaluated regionalization options for 83 communities – including the city of Pittsburgh – for which ALCOSAN provides wastewater treatment.



Finally, long-term, sustainable, comprehensive funding for transportation infrastructure and transit systems is vital if our community is to thrive. Young professionals and emerging leaders have particularly identified reliable, robust mass transit as key to talent attraction and retention. The Allegheny Conference is committed to working with partners across the region and state to achieve this in 2013.



“The Pittsburgh region is a place where people roll up their sleeves and work together in partnership across public and private sectors. By engaging our emerging leaders and being intentional in how we focus our efforts and resources, we will make this a better place for everyone.”

– Laura E. Ellsworth, Partner-In-Charge, Jones Day-Pittsburgh
Allegheny Conference Vice Chair, Pennsylvania Economy League of Greater Pittsburgh Chair

Exploration & Production

Upstream

Storage & Transmission Pipelines

Midstream

Uses include:

- Gas distribution
- Fuel
- Gas-to-Liquids
- Feedstock for petrochemical, plastics industries

Downstream

Downstream Opportunities Emerging

Shell Chemical's proposed petrochemical complex near Monaca, Beaver County would be the single largest “from the ground up” industrial investment in the Pittsburgh region in a generation. This multi-billion dollar facility, known as an ethane cracker, would convert liquids from natural gas into ethylene products for use as feedstock for countless manufactured goods. An analysis by the Pennsylvania Economy League of Greater Pittsburgh estimated the facility would support 18,000 direct, indirect and induced jobs in the peak year of its construction, and between 2,000 and 8,000 jobs when operational. The Pittsburgh Regional Alliance has been instrumental in liaising among Shell and regional stakeholders to help move this proposed project forward.



Five Challenges in 2013

These are relatively good times for the Pittsburgh region. Although the unemployment rate edged up in 2012, interest in our region among business decision makers remains strong. At the same time, we cannot take our successes for granted. Five important challenges top our priority list:

Skills Gap

While the story of Pittsburgh's comeback is something to celebrate, Pittsburgh faces the unique workforce challenge of meeting the demands of a growing economy coupled with 30 years of population loss and the oncoming retirement of Baby Boomers. In a recent occupational analysis by the Allegheny Conference and the Energy Alliance of Greater Pittsburgh, employers identified 14 types of jobs across all seven energy sectors that are already difficult to fill but remain in high demand. Industry must create awareness of these opportunities and partner with schools engaged in workforce development if increasing demand is to be met.

Transit and Transportation Funding Crisis

Allegheny County and metropolitan Pittsburgh averted a crisis in summer 2012 when Port Authority management, labor and state, county and local governments together crafted a temporary solution to keep the buses and trains rolling. In February 2013, Governor Corbett set the stage for a robust debate by announcing his vision for addressing the state's transportation funding crisis. We are committed to working with partners across the region and state to support a funding package that addresses transportation and transit needs and can muster enough support to pass the General Assembly and gain the final approval of the Governor.

Site Shortage

Our inventory of "shovel-ready" sites is becoming competitively scarce. Over the past decade, with the support of the "Business in Our Sites" program, we were able to secure state investment in

infrastructure that prepared thousands of acres of business sites for development. Located in all 10 counties, many of these sites are becoming fully occupied. Without shovel-ready inventory, companies will go – and in some cases already have gone – elsewhere. The PRA is working with the Power of 32 to create a regional site development fund, but given the special challenges of our topography and lack of infrastructure, this is an area where public-private partnerships are essential.

Capital Squeeze

Over the past generation we have invested in the innovators and entrepreneurs pouring out of our region's 35 colleges and universities to create hundreds of new companies in our key industry sectors. That's because we have a strong network of support organizations that work with entrepreneurs and early-stage companies, among them Innovation Works, the Pittsburgh Life Sciences Greenhouse, the Pittsburgh Technology Council and the Idea Foundry. To turn innovative ideas into new businesses, we rely on the availability of venture capital. Of late that has been in increasingly short supply, especially home-grown venture capital funds that are more likely to keep start-ups in our region as they grow. It is critically important to identify new sources of such venture funding.

Pension and Binding Arbitration Concerns

The Commonwealth is home to one-quarter of all the municipal pension plans in the nation, many of which are chronically underfunded. Pennsylvania's one-sided binding arbitration law perpetually escalates the

cost of public safety services. Pension and binding arbitration reform can help secure the fiscal sustainability of our municipalities. Without such reforms, our local governments will continue to reduce services and raise taxes as they struggle to meet the basic needs of their residents and businesses.

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