# Regional Growth Series
# Briefing: The Table Stakes: The Enabling Ecosystem that Makes Big Bets Possible

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This briefing is part of the Allegheny Conference on Community Development's Regional Growth Series, which provides employers, investors, and regional leaders with timely insights and reflections on the policy, market, and execution issues shaping Southwestern Pennsylvania's growth trajectory.

Drawing from employer and practitioner perspectives shared during the event, this document synthesizes what enables large-scale industrial, infrastructure, and development projects to move from initial interest to operation. The discussion focused on the often-invisible ecosystem of sites, utilities, broadband, engineering, construction, finance, permitting, workforce, and public-private coordination that determines whether an investment can be delivered.

Across project types, the central question is not whether Southwestern Pennsylvania possesses individual assets, but whether those assets can be organized into a predictable, coordinated, and timely pathway to execution. As regions compete for complex and capital-intensive projects, delivery capacity is increasingly becoming a structural driver of competitiveness.

## Executive Summary


- Major investments are won before public announcements, when investors test whether a region can finance, permit, build, and operate a project on a reliable timeline.
- Southwestern Pennsylvania's advantages include mature industrial sites, energy and water capacity, broadband, skilled labor, capital, and a deep bench of engineering, construction, legal, and technical firms.
- Site readiness spans full system capacity (utilities, infrastructure, permitting, supply chains, and workforce).
- Speed-to-market requires early coordination and parallel execution across actors.
- Delivery models (integrated, flexible, clear ownership) drive time/cost performance.
- The largest constraints are fragmented approvals, long utility and equipment timelines, workforce limits, and inconsistent use of delivery models that allow work to proceed faster.
- The regional opportunity is to turn a strong but dispersed ecosystem into a visible, repeatable investment-delivery platform.

## What the Discussion Signals for Regional Growth

### 1. Investment Readiness & Execution

Investors evaluate the full path from site control to operation: infrastructure capacity, development cost, environmental and geotechnical conditions, approvals, supply chains, workforce, and public acceptance. Incentives may help close a financing gap, but they cannot compensate for an uncertain schedule or an unclear delivery pathway. One common misperception is that companies make decisions based on incentive packages, when in fact incentives are often a late-stage consideration and are becoming less significant in the current climate. As such, execution – not asset inventory – increasingly differentiates regions.

### 2. Integrated Site & Infrastructure Readiness

Mature industrial sites and existing energy, water, and transportation networks can lower cost and accelerate development, but legacy infrastructure is not automatically project-ready. Broadband extensions can require 18-24 months longer, critical energy equipment now carries multi-year lead times, and environmental, utility, and site conditions can alter feasibility. Readiness therefore has to be confirmed against the needs and schedule of each project.

### 3. Speed-to-Market & Delivery Models

Projects lose time when utilities, permitting agencies, consultants, contractors, financing partners, and communities work sequentially. Early coordination and parallel workstreams can reduce delay, while clear project ownership and integrated tools such as design-build and public-private partnerships can compress schedules. One example discussed reduced an infrastructure delivery timeline from four years to 18 months; Pennsylvania's more limited use of tools outside transportation leaves time and economic value on the table.

### 4. Workforce Capacity & Public Confidence

Construction trades, engineers, environmental professionals, technicians, utility operators, and project managers are all required to deliver growth. With three in five construction workers described as eligible to retire within five years, overlapping projects could strain capacity and crowd out smaller expansions. Early public engagement is equally important: community opposition can quickly become a schedule and investment risk even when technical conditions are favorable.

### 5. Regional Coordination & Market Positioning

Southwestern Pennsylvania can draw on experienced finance, legal, engineering, construction, utility, broadband, workforce, and public-private partners that have delivered complex projects together. Investors do not always see those capabilities as one coordinated platform. The region's story should demonstrate who can lead, how partners connect, where the model has worked, and how that coordination reduces project risk.

## Alignment & Friction Points

**Areas of Alignment**

- Mature industrial and brownfield sites with existing power, gas, water, and transportation infrastructure
- Deep engineering, construction, finance, legal, utility, broadband, and environmental expertise
- Established labor relationships and strong skilled-trades and technical capacity
- Clear fit with advanced manufacturing, energy-intensive industry, data infrastructure, and major public works

**Areas of Friction**

- Fragmented local approvals and inconsistent permitting across many jurisdictions
- Long utility, broadband, and critical-equipment lead times that weaken speed-to-market
- Limited use of design-build and broader public-private delivery tools outside transportation
- Aging construction and technical workforces, with major projects competing for limited delivery capacity
- Uneven public engagement and a fragmented market narrative can increase risk and obscure regional capability

## Implications for Employers

- **Investors and Developers:** Validate infrastructure, approvals, supply chains, workforce, and community conditions together at the start of site evaluation.

- **Infrastructure, Utility, and Professional-Service Employers**: Operate as an integrated delivery team with shared timelines and clear ownership, rather than as a sequence of separate providers.

- **Existing and Growth-Oriented Employers**: Plan around the full regional project pipeline so major new investments do not crowd out expansions, maintenance, or ongoing operations.

## Where the Allegheny Conference Is Engaged

- Positioned to connect attraction and expansion work with site, infrastructure, workforce, and deployment support
- Advance permitting and infrastructure-delivery reforms
- Align workforce strategies with the project pipeline
- Present investors with a proof-based narrative of the region’s ability to execute

## Bottom Line

Southwestern Pennsylvania has the underlying assets and expertise to compete for complex investment. The region will win more consistently when those capabilities function – and are presented to investors – as one coordinated delivery system with verified sites, clear ownership, modern delivery tools, sufficient workforce capacity, and a reliable path from decision to operation.