



*2010 Annual Report
Resource Development Council
for Alaska, Inc.*

Growing Alaska through responsible resource development

RDC Officers



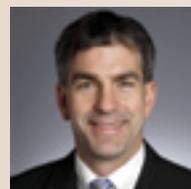
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Oil and Gas

Industry Fact

It is estimated that Alaska's offshore, NPR-A, and ANWR contain approximately 50 billion barrels of oil.



Overview

With the discovery of oil at Prudhoe Bay and the construction of the trans-Alaska Oil Pipeline, the oil and gas industry remains Alaska's economic lifeline and a major source of domestic energy. The industry generated an overwhelming majority of Alaska's general fund revenues, accounting for 88.8 percent or \$5.18 billion of all unrestricted state revenue in fiscal year 2009. FY 2010 unrestricted revenues from oil and gas production are anticipated to be \$5.03 billion and FY 2011 revenues are forecasted to reach \$4.658 billion – 88 percent of unrestricted revenues.

Daily oil production in FY 2010 is projected to fall to 650,000 barrels per day and 619,000 barrels per day in FY 2011. Current Alaska production accounts for approximately 13.4 percent of U.S. domestic production.

An analysis by the University of Alaska Anchorage showed the oil industry supports as much as one-third of the state's workforce, including funding for three-quarters of state government jobs.

Alaska's largely untapped offshore waters and onshore prospects hold the potential to fuel the state's economy for decades and play a key role in ensuring America has the energy it needs until alternative sources become available on a large scale.

RDC's Efforts

- Testified in Washington, D.C. and Alaska on the Comprehensive Conservation Plan revision for ANWR. Supported oil and gas development in the 1002 Area of the refuge and opposed new Wilderness designations. Rallied Alaskans to public hearings to support ANWR exploration.
- Played a leading role in an Alaska Energy Citizens Rally to highlight energy issues facing Congress. Speakers focused on the need for offshore energy and what it may mean to the Alaska economy, as well as ramifications of emerging climate change legislation on the proposed natural gas pipeline, American industries and household energy costs.
- Published Action Alerts and submitted comments supporting OCS lease sales.



- Advocated for improved tax policies that enhance Alaska's competitiveness for investment and supported legislation encouraging new development.
- Opposed the designation of 200,000 square miles as critical habitat for polar bears.
- Testified in support of the Point Thomson project.
- Encouraged construction of a gas pipeline from the North Slope to the Lower 48.
- Held numerous industry forums, including featuring over a dozen senior executives at RDC's annual fall conference.
- Featured oil and gas issues and projects in *Resource Review* newsletter.
- Published background paper on the oil and gas industry at akrdc.org.

Industry Fact

Of the 30 minerals the U.S. imports from abroad, 22 are found in Alaska, providing strategic opportunities for the industry and nation.

Mining



Overview



Mining in Alaska is not only an important part of Alaska's history, it is also an important part of Alaska's economy and future. Mining provides approximately 5,200 jobs annually, and \$320 million in direct and indirect payroll. Industry jobs include exploration, development and production of coal, gold, lead, silver, zinc and construction materials.

Mining not only employs Alaskans from over 120 communities around the state, many in economically disadvantaged areas, but also pays millions to local and state governments. In 2009, mining brought nearly \$40 million in payments to Alaska Native Corporations.

With six large operating mines, mining boasts 21% of Alaska's total exports.

RDC's Efforts

- Provided comments for Red Dog's expansion into the Aqqaluk prospect.
- Submitted comments on the Section 404 permit for the Kensington gold mine, which recently went into production.
- Engaged members to participate in public hearings and to comment in support of the Wishbone Hill project.
- Intervened in Nunamta Aulukestai v. State of Alaska defending the constitutionality of land and water use permits issued by DNR for mineral exploration.
- Continued participation in APOC complaint against the Renewable Resources Coalition, Alaskans for Clean Water, Americans for Job Security, and Robert Gillam on Alaska's campaign disclosure laws.
- Featured mining issues and projects in *Resource Review* newsletter and hosted public forums with presentations from mining industry executives across the state.
- Published background paper on the mining industry at akrdc.org.



Forestry

Industry Fact

Of the 17 million acres in the Tongass National Forest, only 676,000 acres – or four percent of the forest – may be harvested over the next 100 years.

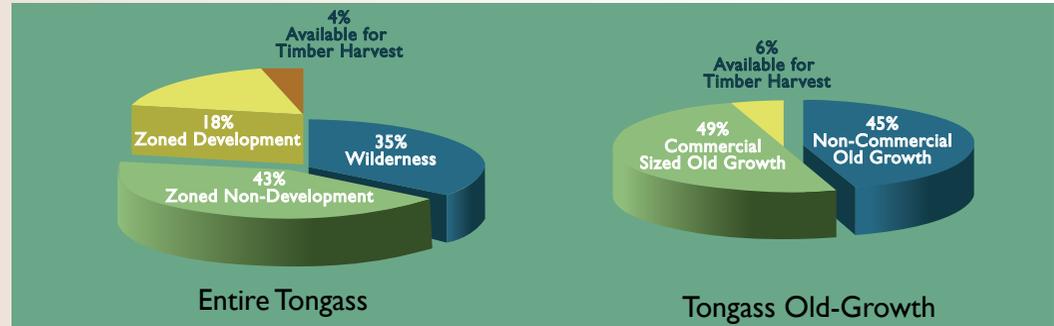


Overview

Alaska has 129 million acres of forested land, stretching from the coastal rain forest of Southeast and Southcentral Alaska to the boreal forest of the Interior. Four landlords manage Alaska's forests: the federal government, 51 percent; state and local government, including the University of Alaska system, 25 percent; Native corporations, 24 percent, and private landowners, 0.4 percent. Most commercial logging has taken place in the coastal zone primarily on federal and Native corporation land in Southeast Alaska.

The two largest national forests in America, the Tongass and the Chugach, are located in Alaska. No commercial logging occurs in the Chugach, and in FY 2009 a record low harvest of 28.4 million board feet occurred in the Tongass. A similar volume is expected to be logged this year and future harvests are likely to be constrained due to litigation by environmental groups. Under the current Tongass Land Management Plan, the annual harvest ceiling is 267 million board feet.

Timber harvests on Native lands in Southeast Alaska and on Afognak Island reached 90 million board feet in 2009. In addition, the State of Alaska sold 18.1 million board feet of timber in 91 sales throughout the state, most of which went to Alaskan purchasers for value-added processing. These sales included timber to help support mills in Southeast Alaska hit hard by the decline in federal timber sales.



About 400,000 acres, seven percent of the total productive old-growth, has been harvested over the last 100 years in the Tongass National Forest. About 15% of the highest volume stands have been harvested, while about 85% of the forest's highest volume old-growth remains unharvested. Over the next 100 years, the Forest Plan allows for harvest of less than ten percent of this high volume old-growth.

RDC's Efforts

- Supported Sealaska federal lands bill.
- Published background paper on the forestry industry at akrdc.org.
- Supported legislation establishing the Southern Southeast Alaska State Forest.
- Participated in national roundtable discussions on new Forest Service Planning Rule and submitted comments.
- Featured forestry issues and projects in *Resource Review* newsletter and hosted public forums with presentations from executives across the state.



MINERAL, OIL, AND GAS RESOURCES OF ALASKA

DIGITAL SHADED RELIEF IMAGE OF ALASKA

BY J.R. RIELHE ET AL., 1996,

USGS MISCELLANEOUS INVESTIGATIONS MAP I-2585

Mineral Information provided by the Alaska Department of Natural Resources and Division of Geological and Geophysical Surveys.

Oil and Gas Data provided by AK DNR DOG, US MMS, and BLM.

RESOURCE CATEGORIES

- ☆ OPERATING MINES
- ▲ PROJECTS IN DEVELOPMENT
- ◇ Projects in Predevelopment
- Major Exploration Projects, 2009
- Past Producing Mines
- Mineral Prospects
- ▨ Placer Districts
- ▨ Coal Basins
- ▨ Oil and Gas Basins
- Active BLM Oil & Gas Leases, May 2010
- Active MMS Oil & Gas Leases, May 2010
- Active State Oil & Gas Leases, May 2010
- Active Native Oil & Gas Leases, May 2010
- Trans-Alaska Pipeline

Mineral Deposit Types

- Coal Deposits
- Polymetallic Deposits (Precious and Base Metals)
- Other Deposits (Barite & Jade)
- Base Metal Deposits (Copper, Lead, Zinc, with minor Silver & Barite)
- Chromium, Titanium, Nickel, Copper and Platinum Group Element Deposits
- Copper, Gold, Molybdenum Deposits
- Mercury and Antimony Deposits
- Uranium and Thorium Deposits
- Tin Deposits
- Gold and Silver Deposits (with minor Arsenic, Antimony, Bismuth and Tungsten)
- Iron Deposits (with minor Gold, Copper, Titanium and Vanadium)



WHERE CAN WE DEVELOP ALASKA'S RESOURCES?

Federal Land - through Federal mining claims, oil & gas leases and timber sales

- Chugach National Forest
- Tongass National Forest
- Bureau of Land Management
- National Petroleum Reserve - Oil and Gas only

State Land - through State mining claims, agreements, oil & gas leases and timber sales

- State Land
- Mental Health Trust Lands

Native Land - through leases and agreements

- Native Land

Private Land - through leases and agreements

- Private and Municipal Land

WHO OWNS ALASKA'S LANDS?

The Federal Government

- Chugach National Forest (USFS)
- Tongass National Forest (USFS)
- Tongass National Forest Wilderness Areas (USFS)
- National Monuments (USFS)
- National Parks and Preserves (NPS)
- National Wildlife Refuges (USFWS)
- Wild and Scenic Rivers (BLM)
- Bureau of Land Management (BLM)
- National Petroleum Reserve (BLM)
- Steese National Conservation Area (BLM)
- White Mountains National Recreation Area (BLM)
- Major Military Land (DOD)

The State of Alaska

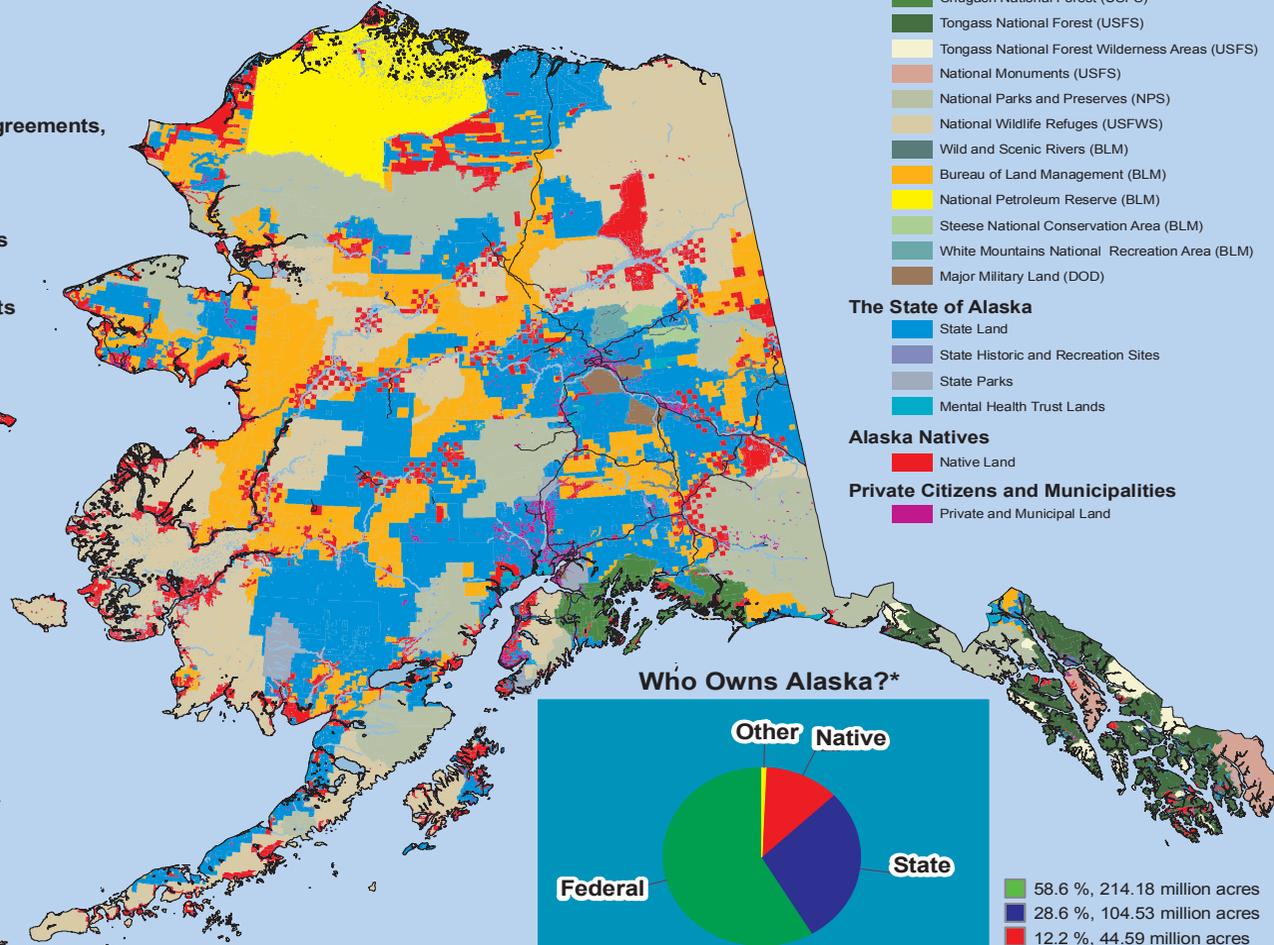
- State Land
- State Historic and Recreation Sites
- State Parks
- Mental Health Trust Lands

Alaska Natives

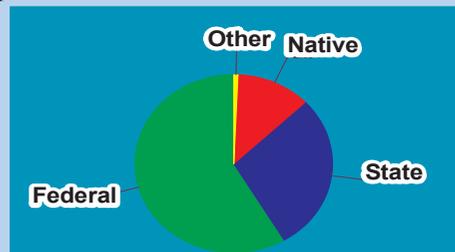
- Native Land

Private Citizens and Municipalities

- Private and Municipal Land



Who Owns Alaska?*



- 58.6 %, 214.18 million acres
- 28.6 %, 104.53 million acres
- 12.2 %, 44.59 million acres
- 0.7 %, 2.56 million acres

*after full conveyance of Federal lands and Native allotments. Acreage based on total Alaska acreage of 365.5 million acres, US BLM, Division of Conveyance Management, Sept. 2001

WHERE CAN WE NOT DEVELOP ALASKA'S RESOURCES?

Federal Land

- Tongass National Forest Wilderness Areas
- National Monuments
- National Parks and Preserves
- National Wildlife Refuges*
- Wild and Scenic Rivers
- Steese National Conservation Area
- White Mountains National Recreation Area
- Major Military Land

*Oil and gas leasing is permitted if found to be compatible with the refuge.

State Land

- State Historic and Recreation Sites
- State Parks



Fishing

Industry Fact

Alaska has 34,000 miles of coastline reaching three seas and produces half of the nation's seafood landings.



Overview

Alaska continues to be the national leader in supply of seafood landings since 1975, producing half of the nation's landings.

In 2008, Alaska's fish harvest was valued at a record \$1.7 billion, breaking the previous record from 1992. Seafood accounted for more than 52,000 workers in recent years.

The seafood industry provides job opportunities to residents of rural and coastal communities, as well as supports the same communities through taxes and indirect jobs.

Uniquely, Alaska provides approximately 80% of the world's wild salmon and is home to all five Pacific species.

RDC's Efforts

- Submitted comments on the framework for Coastal and Marine Spatial Planning.
- Testified and submitted comments to the National Ocean Policy Task Force.
- Supported legislation giving loans for energy efficiency improvements to fishermen.
- Featured fishing issues and projects in *Resource Review* newsletter and hosted public forums with presentations from executives across the state.
- Published background paper on the fishing industry at akrdc.org.





Industry Fact

Approximately one million visitors come to Alaska each year on cruise ships.

Tourism

Overview

It's no secret Alaska's tourism industry is facing tough times. Visitor traffic to Alaska dropped 7.3 percent between the summer of 2008 and summer 2009, the largest decline since tracking began in 1985. An estimated 1.6 million visitors traveled to Alaska between May and September 2009. Two-thirds of this total, 1,026,600, were cruise ship passengers. An additional 242,500 visitors came between October 2008 and April 2009. Declines in air, ferry and highway markets were moderated by flat cruise passenger volume.

Visitors spent an estimated \$1.5 billion in Alaska between October 2008 and September



2009. When spending on travel to enter and exit Alaska is included (cruising, air and ferry tickets), spending totaled \$2.1 billion. The industry accounted for 27,100 direct jobs in Alaska with a payroll of \$800 million.

Impacted by an excessive tax regime and inequitable environmental regulations, cruise ship companies have begun to deploy their vessels to more profitable regions of the world. At least 140,000 fewer passengers are expected in 2010 as cruise ship companies re-route ships to more profitable locations. The loss of ships and \$150 million in less spending will result in the loss of several thousand jobs in the visitor industry this year.

RDC's Efforts

- Helped in the formation and ongoing efforts of the Alaska Alliance for Cruise Travel (AlaskaACT), a new statewide grassroots group of business owners advocating for a positive business environment to restore the cruise and tourism industries in Alaska.
- Encouraged the Legislature and State to successfully resolve the legal issues between the State and the cruise industry.
- Opposed inequitable taxation directed at the cruise industry as a result of the 2006 Ballot Initiative, and worked to pass legislation reducing taxes on cruise passengers.
- Lobbied for equitable environmental laws, provided comments on the cruise ship General Permit and advocated for increased access to Glacier Bay National Park.
- Participated in Tourism Summits held to address the crisis in the tourism sector.
- Featured tourism issues and projects in *Resource Review* newsletter and hosted public forums with presentations from executives across the state.
- Published background paper on the tourism industry at akrdc.org.

Endangered Species

Together with the state of Alaska, RDC has led the way in defending Alaska's industries and projects against the misuse of the Endangered Species Act (ESA).



This past year, RDC spent extensive time opposing the proposed critical habitat designation of over 3,000 square miles for the Cook Inlet beluga whale. RDC conducted an independent economic analysis of the potential impacts of the critical habitat designation and submitted the results along with extensive written comments to the National Marine Fisheries Service. We garnered significant support for our position as the Alaska Congressional delegation, State Legislature, and many RDC members testified and submitted similar comments. RDC will be engaged in the beluga's recovery plan efforts, and will work to ensure that unnecessary measures are not placed upon industries and communities that neither caused the population decline nor impeded the beluga's recovery.

In addition, RDC also worked to limit proposed critical habitat designations for polar bears. Over 200,000 square miles of critical habitat were proposed for a stable population of bears that have not been adversely impacted by oil and gas or mining development. Unfortunately, if these areas remain critical habitat, additional onerous requirements will be put in place that will have a significant negative impact on our state's economy with no benefits to the polar bear population.

RDC will continue to engage in ESA related issues, especially as they target every industry and community development project in this state.



Events



Community Outreach Trip – September 18-20, 2009

Over 50 RDC board members, staff, and guests toured Interior Alaska, including Fairbanks, Chena Hot Springs, Healy and Denali. Attendees heard presentations on energy, tourism, mining, oil and gas, and more. Highlights of the tour included the ice hotel at Chena Hot Springs and riding the Alaska Railroad to Anchorage after touring Usibelli Coal Mine.



Annual Meeting – June 30, 2009

With opening remarks by U.S. Senator Mark Begich, RDC welcomed keynote speaker David Lawrence, Executive Vice President, Exploration, Royal Dutch Shell. With nearly 900 attendees, Mr. Lawrence spoke to developing Alaska's oil and gas resources in a safe and environmentally responsible way.



Alaska Resources Conference – November 18-19, 2009

With over 900 registrants at the two-day conference, guest speakers and presenters provided industry and project updates. Decision-makers, legislators, federal, state and local government officials, students and educators attended the annual event, which featured panel sessions, a multi-industry trade show and a VIP networking session open to attendees. The 2010 conference will be November 17-18 in Anchorage.



Breakfast Meetings – September–May

Attendees heard updates on resource development projects and issues. These forums, held in Anchorage, moved to a larger venue, allowing for higher attendance and a greater networking opportunity. Presentations and videos of programs are available at akrdc.org.



Special Events

RDC hosts numerous special events for members throughout the year. Forums focused on Cook Inlet Natural Gas, Alaska natural gas transportation projects, federal energy issues, and BP's Statistical Review of World Energy. Presentations are available for most forums at akrdc.org.



18th Annual Coal Classic – June 16, 2010

RDC staff coordinated a sold out golf tournament to benefit Alaska Resource Education (formerly AMEREF). Volunteers and a full slate of golfers participated, raising funds to help educate Alaska's students about natural resources.



Legislative Fly-in to Juneau – March 23-24, 2010

RDC board members and staff met with Governor Parnell in Anchorage, as well as members of his administration and nearly 30 legislators in Juneau.



**Women in Resources Anchorage – June 29, 2009
Juneau – February 10, 2010**

Women RDC board members and staff hosted the sixth annual reception in Juneau and an additional reception in Anchorage, with attendance by legislators, administration officials and business leaders.

2010 Alaska Policy Positions

Top Legislative Actions

RDC was active in Juneau last session, testifying and providing written comments on a number of bills.

- **Supported HB 36 - Open and Transparent Initiative Act**
- **Opposed HB 74/SB 4 - Alaska Coastal Management Program**
- **Supported HB 308 - Oil and Gas Production Act**
- **Supported SB 312 - Cruise Ship Head Tax Reduction**
- **Supported HB 162/SB 127 - Southern Southeast Alaska State Forest**
- **Supported SB 284 - Campaign Expenditures**

Other bills RDC supported that passed included the following:

- HB 20 - Fisheries Loans for Energy Efficiency**
- HJR 7 - Open ANWR to Oil Exploration**
- HJR 18 - Opposing New ANWR Wilderness**
- HJR 28 - Opposing Restrictions to Alaska Waters**
- HJR 40 - Opposing Critical Habitat for Cook Inlet Beluga Whales**
- HCR 10 - Alaska's Right to Submerged Land in Navigable Rivers**

General Issues

Fiscal Policy & Planning

- Advocate development and implementation of a comprehensive, responsible, and long-range state fiscal plan.
- Support equitable and predictable tax and royalty policies.
- Support some use of the Permanent Fund earnings as part of a fiscal plan.
- Support development of a state strategic economic development plan.
- Oppose efforts to enshrine the Permanent Fund Dividend in the Alaska Constitution.

Access

- Advocate increased access to and across public lands for resource and community development.
- Advocate for multiple-use of public lands.
- Continue to assert the state's rights on navigable waters and submerged lands.

Regulation/Permitting

- Support efforts to ensure Alaska's ballot initiative process is open and transparent.
- Encourage the state to promote and defend the integrity of Alaska's permitting process.
- Advocate clear, timely, and streamlined state and federal permitting systems based on sound science, economic feasibility, and protection of property ownership rights.

- Provide adequate resources to permitting agencies for personnel, research, and science.
- Support the State of Alaska's efforts to challenge unwarranted Endangered Species Act listings and proposed critical habitat designations.
- Remove the "Point of Discharge" requirement implemented by the 2006 cruise ship head tax initiative to empower DEC to regulate cruise ship discharges to meet all water quality standards.
- Encourage the state to carefully consider the impacts of potential changes to the ACMP program on communities and industry while striving to eliminate the duplication of current state and federal requirements.

Infrastructure

- Encourage the state to develop a prioritized transportation strategy that supports resource and community development activities.

Education

- Support programs, including the Alaska Resource Education program, to educate students and the general public on responsible resource development activities in Alaska.
- Support growing the state's emphasis on workforce development.

Industry Specific Issues

Oil & Gas

- Advocate for an improved tax policy that enhances the State of Alaska's competitiveness for exploration and development investments.
- Support legislation to encourage new exploration and development of Alaska's oil and gas deposits, as well as enhanced production from existing fields.
- Encourage public policy and fiscal decisions to improve the commercial viability of developing Alaska's North Slope and Interior natural gas resources.
- Support efforts to increase Cook Inlet oil and gas exploration, development and deliverability to meet local demand and export markets.
- Encourage incentives to improve the commercial viability of developing Alaska's challenged oil and gas resources, such as heavy oil.
- Educate and advocate for opening the coastal plain of ANWR to oil and gas development.
- Support offshore oil and gas development and work to maximize benefits to Alaska through advocacy for federal revenue sharing and/or community impact assistance.
- Oppose efforts, either legislatively or through the initiative process, to impose a gas reserves tax.

Energy

- Support simplified leasing and permitting of non-conventional fuel resources to encourage development of the state's resources and provide energy to local areas.
- Encourage development of new electrical generating and transmission systems to provide stable sources of electricity for economic development and existing electricity consumers.
- Support utilization of Alaska's coal resources for value-added industries and power generation in addition to export to international markets.
- Support efforts to diversify Alaska's energy sources, including known renewable energy options and research and development of non-conventional sources.



Mining

- Support competitive mining tax and royalty policies.
- Encourage the expansion and increased production from existing deposits as well as new exploration and development of Alaska's mineral resources.
- Advocate continuation and expansion of the airborne geophysical mapping program and the on-the-ground follow up work required to realize the full benefits of the program.

Fisheries

- Support fisheries policies that ensure access, markets and revenues for Alaska fishermen and coastal communities, and a healthy competitive environment for the Alaskan seafood processing industry.
- Support reduced fisheries waste and better utilization of Alaska fisheries resources, improved product value and development of new product forms.
- Support funding of fisheries and marine mammal research.

Forestry

- Advocate a reliable and economical long-term federal and state timber supply.
- Support adequate funding and enforcement of the Alaska Forest Practices Act.
- Encourage funding of forest management initiatives that address long-term forest health and reforestation.

Tourism

- Advocate for a positive business environment to restore the cruise and tourism industries in Alaska.
- Encourage the Legislature and Administration to resolve the current legal issues between the State and the cruise industry.
- Oppose inequitable taxation directed at the cruise industry as a result of the 2006 Ballot Initiative.
- Advocate for equitable environmental laws for cruise ships.
- Advocate additional aircraft landing sites and reduced restrictions on over-flights.



RESOURCE DEVELOPMENT COUNCIL

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