2027 – 2031

Comprehensive Economic Development Strategy (CEDS)

DRAFT

For the
Eastern Panhandle Regional Planning
and Development Council (Region 9)
Economic Development District

Berkeley, Jefferson, and Morgan Counties
West Virginia

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REGION 9 is designated by:

The Appalachian Regional Commission (ARC) as a Local Development District (LDD).

The Economic Development Administration (EDA) as an Economic Development District (EDD).

The Federal Highway Administration (FHWA) and the State of West Virginia as the West Virginia Counterpart for

The Hagerstown/Eastern Panhandle Metropolitan Planning Organization (HEPMPO).

The State of West Virginia as a Planning and Development Council (PDC).

The Bureau of Census as an Affiliate Census Data Center, for statistical and applied research.

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Introduction and Vision



The Eastern Panhandle Regional Planning and Development Council's (Region 9) Comprehensive Economic Development Strategy (CEDS) is a five-year economic plan to guide the growth of jobs, development, and commerce in Berkeley, Jefferson and Morgan County, West Virginia. The CEDS assesses changes in the area's economy over the past five years, considers the impact of recent trends and reviews progress made towards achieving the goals and projects identified in the previous plan. The process for developing the CEDS was built upon local and broad-based input and guidance, as well as the integration of economic development planning. This CEDS identifies the key themes which surfaced during a lengthy research process and input from the community and the private sector. Each action recommendation included in this plan will assist in achieving the overall regional vision of the CEDS Plan:

> To continuously improve the quality of life and economic vitality within Berkeley, Jefferson, and Morgan County.

This document is provided pursuant to 13 C.F.R. 303.1 which requires the development of a Comprehensive Economic Development Strategy (CEDS) designed to create and retain highly skilled workers and higher wage jobs for the region.

As background for the findings presented, this report includes:

- ✓ A regional vision statement with a Strategic Direction / Action Plan set of goals, objectives, and strategies.
- ✓ Findings from an in-depth analysis of community and private sector participation, including an analysis of regional strengths, weaknesses, opportunities, and threats; also referred to as SWOT.
- ✓ An Economic Resiliency component which identifies strategies for preventing, withstanding, and quickly recovering a shock to the economy.
- ✓ An Evaluation Framework which measures the effectiveness and performance of the identified goals in the plan.
- ✓ A Technical Report providing an outline of Current Conditions, Trends, Future Needs, and Strategic Findings.

Council Mission and Membership

Mission

The Eastern Panhandle Regional Planning and Development Council (Region 9) exists to advance economic opportunity and quality of life in Berkeley, Jefferson, and Morgan Counties by helping local governments and partners plan growth; identify, secure, and administer federal, state, and private funding; and deliver the infrastructure, workforce, and community development projects that strengthen the regional economy.

City of Martinsburg
Town of Hedgesville

Bolivar, Charles Town, Harpers Ferry, Ranson and Shepherdstown

Morgan County: The Town of Bath (Berkeley Springs) and Paw Paw

Region 9 was organized on June 20, 1972, in response to enabling legislation passed by the West Virginia Legislature and approved by the Governor on November 17, 1971. This enabling legislation is known as the Regional Planning and Development Act of 1971 and re-enacted Article 25, Chapter 8, of the West Virginia Code.

Membership

Membership of the Region 9 Council is specified by state law and the Council By-Laws as follows:

1) All municipalities and all counties within the region shall be represented on the Council.
2) The county representative shall be the president of the County Commission/Council, or a member of the County Commission/Council designated by him/her, in writing.
3) The municipal representative shall be the mayor, or an elected member of the governing body designated by him/her, in writing.
4) The number of elected officials serving shall comprise not less than fifty-once percent (51%) of the total number of members.
5) The terms of office of the members of the Council who serve shall be concurrent with their terms of office.

The principal community and regional interests shall be further represented by the appointment of additional members of the Council.

1) Regional Council members serving as elected officials shall select additional members to serve on the Council to represent principal community or regional interests, including, but not limited to: commerce, industry, labor, agriculture, education, health, and any such interests as may be required by federal law and regulations. The selection of such members shall also provide for reasonable representation of geographic, economic and ethnic groups without exclusion of significant minority groups.

2) Subsequent changes in the designation of representatives shall be determined by the Council.

3) The appointed members shall not exceed forty-nine percent (49%) of the total number of members.

The region includes three (3) counties and nine (9) municipalities. Therefore, 12 members of the Council are elected officials, one from each of the local governments. Eleven (11) non-elected members represent various segments of regional interests so that the Council is made up of 23 total members. Membership is distributed among the three counties in an approximation of population distribution.

Membership on the Council has been apportioned as follows:

Berkeley County:	8 total members; 3 elected and 5 non-elected.
City of Martinsburg:	3 total members; 1 elected 2 non-elected.
Jefferson County:	7 total members; 6 elected and 1 non-elected.
Morgan County:	5 total; 3 elected and 2 non-elected.

Each member is entitled to one vote on all matters brought before the Council. To submit a vote, the member must be present at the meeting where the vote is taken.

The following is a list of the current Region 9 Council membership.

Berkeley County	Jefferson County	Morgan County
✓ Council Person John Hardy	✓ Commissioner Pasha Majdi	✓ Commissioner Bill Clark
✓ Mayor of Martinsburg, Kevin Knowles	✓ Mayor of Bolivar, Chris Higdon	✓ Council Person, Town of Bath, Mary Lynn Hickey
✓ Mayor of Hedgesville, Carey Gano	✓ Mayor Charles Town, Michael George	✓ Council Person, Town of Paw Paw, Devin Abe
✓ Guy Avey, III, Citizen Appointee	✓ Mayor of Harpers Ferry, Gregory Vaughn	✓ Lyn Goodwin, Citizen Appointee
✓ Elaine Bartoldson, Citizen Appointee	✓ Mayor of Ranson, Ken Suits	✓ Ron Davis, Citizen Appointee
✓ Andy Blake Citizen Appointee	✓ Mayor of Shepherdstown, James Gatz	
✓ Dr. James Carrier, Citizen Appointee	✓ Daryl Cowles, Citizen Appointee	
✓ Nic Diehl, Citizen Appointee		
✓ Chad Winebrenner, Citizen Appointee		
✓ Jennifer Smith, Citizen Appointee		
✓ Donna Van Metre, Citizen Appointee		

SWOT Analysis

Through the fall of 2026, an in-depth analysis of regional strengths, weaknesses, opportunities, and threats (commonly known as a "SWOT" analysis) was conducted to determine the issues and opportunities important to our region. Participants included representatives from the Region 9 board, elected officials, utility operators, local business and industry, tourism, regional transportation, education, non-profit organizations, as well as the general public. The SWOT identified key themes which will support this plan's vision. These themes include **an above average quality of life, a lack of adequate infrastructure, the effects of a rapidly growing population, diverse educational opportunities, and a qualified workforce.**

Between 2021 and 2025, the Eastern Panhandle added nearly 4,900 jobs, a gain of almost 9% that outpaced statewide job growth of under 6%; however, due to its proximity to neighboring states with higher pay rates, 48% of Panhandle residents hold jobs outside of the state. Berkeley County has led the state in growth, adding more than 17,000 residents since 2020, the largest numeric and percentage gain (14.3%) of any county in West Virginia. Since 2000, the region has added more than 87,000 residents, offsetting about two-thirds of the nearly 130,000-resident decline across the state's other 52 counties. As a result of its rapid growth, Region 9 contributes nearly 14% of West Virginia's total state tax revenue and its $9.7 billion regional GDP represents 8.6% of West Virginia's economy. Since 2020, the region's population has grown by an average of about 2.2% per year, and this growth was paramount in determining the objectives and strategies within this plan.

Strengths	Weaknesses
✓ Low Cost of Living ✓ Quality of Place ✓ Public Safety ✓ Outdoor recreation ✓ Workforce development/participation	✓ Lack of sufficient infrastructure ✓ Lack of shovel-ready sites ✓ Underperforming K-12 educational systems with lack of physical capacity to accommodate growing student population.
Opportunities	**Threats**
✓ Quality of life investments ✓ New perspectives to promote change for positive outcomes. ✓ Eastern WV Regional Airport (MRB) expansion	✓ Funding concerns for the MARC train and federal transit dollars ✓ Support for vulnerable populations

According to stakeholders, the biggest strength within the region is the low cost of living, coupled with excellent quality of life amenities, including public safety, primary health services, and outdoor recreation, which contributes to the region's population and diversity. While the

region's population maintain a strong sense of "hometown pride" in their communities, they are receptive to increased diversity and perspectives from new residents that promote change for positive outcomes.

The region's location to major metropolitan areas and its proximity to the interstate highway network has facilitated strong residential, commercial, and industrial development growth. The region was identified as needing a unified, long-term growth management plan that considers the collective needs of the population, environment, and infrastructure considering this growth. Commercial and industrial development is thriving due to the region's vocational and technical training institutions which support a strong workforce development environment. Workforce participation rates in all three counties exceed the national average. However, the region's K-12 educational systems were identified as a weakness as underperforming and lacking physical capacity to accommodate student population growth.

Stakeholders' most consistent concern is that population and business growth is outpacing the region's infrastructure. Roads, water, sewer, stormwater, electric power, broadband, cellular service, and public services are all under strain, and local governments lack the revenue tools and long-term operations and maintenance funding to keep up. Water is the most pressing constraint. The region's karst geology makes groundwater supply and protection a long-term risk, and new manufacturing, tourism, and data center demand are adding pressure on water sources. Electric power capacity has emerged as a new constraint: proposed data centers cannot yet secure power, new substations can take three to five years to build, and large transformers are years out from order. Broadband deployment has expanded substantially in recent years with federal and state investment, but gaps in fiber and cellular coverage remain, especially in rural areas. Those gaps limit remote work, telehealth, education, and business growth, and stakeholders noted that neighboring Maryland and Virginia offer stronger connectivity. Stakeholders also pointed to a shortage of fully serviced, shovel-ready industrial and commercial sites and noted that the region has lost investment to neighboring states when needed infrastructure was not in place. In response, they called for coordinated, infrastructure-led development across all three counties.

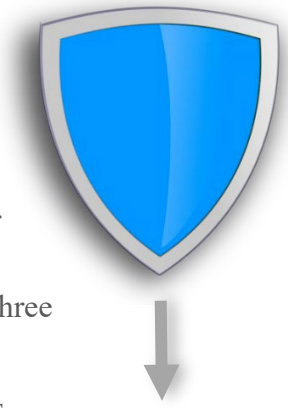
The Eastern WV Regional Airport (MRB) remains one of the region's most important growth assets. Marshall University is expanding its aviation programs, including professional pilot training, Berkeley County Schools has created aviation pathways for high school students, and planned federal investment in an aviation training facility would add aircraft maintenance and air traffic control training. Stakeholders see opportunities in aerospace, maintenance, repair and overhaul, defense-related activity, and airport-based industry, while acknowledging that further airport investment must be justified through benefit-cost analysis.

Transportation capacity has not kept pace with growth. Stakeholders cited severe congestion on WV Route 9, congestion through Harpers Ferry and mountain corridors, and roughly a decade of underinvestment in Berkeley County roads while housing growth continued. Priority projects include continued widening and safety improvements along Interstate 81, WV Route 9 West between Martinsburg and Berkeley Springs, Interstate 81 Exit 12 at WV Route 45, intersection improvements along US Route 11, the Charles Town interchange at US 340/WV 9/WV 51, and local bridge needs. Future trends show regional population and employment growth continuing

to outpace financial forecasts for transportation system expansion. The state's new benefit-cost scoring process for the Statewide Transportation Improvement Program should give local governments a clearer path to advance their priorities, and Region 9 and HEPMPO will continue to support projects not yet programmed. Stakeholders also emphasized the need for a more diversified transportation network, including transit, walking, and biking options. The Eastern Panhandle Transit Authority's (EPTA's) new transit center, expected in 2027, is a major step, but transit operating funding is at risk: as the urbanized area approaches 200,000 residents, federal operating support may decline and shift more of the cost to local governments. MARC train service continues to relieve roadway congestion and connect residents to Washington-area jobs, but ridership and local economic activity around the stations are tied to federal employment, and stakeholders saw this connection weakened during federal shutdowns. Federal workforce reductions and shutdowns are therefore a direct threat to the region's commuter economy. In Morgan County, the US 522 bypass will remove heavy truck traffic from downtown Berkeley Springs, but it may also divert visitors who now stop on impulse, so the community will need to market itself as a destination before the bypass opens.

Finally, stakeholders identified serious gaps in mental health care, substance use treatment, homelessness services, emergency and transitional housing, and other supports for vulnerable residents. They noted that these needs are growing with the region's population and that limited mental health resources are closely tied to substance use, homelessness, and barriers to employment. Region 9 does not have the authority to enforce laws or the expertise to operate treatment and recovery programs, but it can help build stronger pathways for youth and for people in recovery. By implementing the strategies below, Region 9 will support job growth, competitive wages, and diverse career options; help community partners expand quality-of-life alternatives for youth and families; and support education and training partners in providing the intervention and skill development residents need to build careers and take pride in their work and community.

Economic Resiliency



All communities, whether those in locations likely to experience significant natural disasters or those dealing with economic shifts, must be able to recognize their vulnerabilities. While there is no specific method for building regional economic resilience, the Eastern Panhandle Planning and Development Council's 2027-2031 CEDS Plan has developed several strategies and actions that can mitigate the effects of an economic incident and support long-term recovery efforts. These are identified with a blue shield in the left column. The shield symbolizes the three points to resiliency; Preventing, Withstanding, and Recovering.

Region 9 has included strategies in this document to strengthen the region's resilience against future economic shocks, whether a national downturn, the loss of a major employer, federal spending cuts, or a natural disaster. These strategies were developed from

stakeholder input gathered during the 2026 SWOT workshops and survey, along with lessons from recent disruptions, including the COVID-19 pandemic and federal government shutdowns. They address both steady-state resilience, meaning long-term efforts such as economic diversification, workforce development, and infrastructure investment that help the region withstand shocks, and responsive resilience, meaning the partnerships and capacity needed to act quickly and recover after a disruption. Resilience strategies are marked with the shield icon, representing the region's ability to prevent, withstand, and recover from economic disruptions.

Stakeholders identified several risks that shape these strategies: water supply limits and groundwater vulnerability in the region's karst geology; electric power capacity constraints; flooding, drought, and severe weather; cybersecurity threats; dependence on federal employment and federal funding; employer downsizing driven by outside market forces; and the uneven fiscal and service impacts of large developments such as data centers.

The strategies in the following section are built around four concepts:

1. **Establishing Networks**
   Region 9 will continue to build mechanisms for regular communication and collaboration among local governments, economic development organizations, emergency managers, utilities, employers, educational institutions, nonprofits, and state and federal partners. Economic development professionals will work with local and regional emergency managers to address the risks identified through hazard mitigation planning, including water supply, flooding, utility reliability, and disaster response capacity, and to coordinate recovery support for businesses and workers after disruption

2. **Identifying Regional Economic Challenges or Deficiencies**
   Region 9 will continue to monitor and report on weak spots and threats, including infrastructure capacity, water and electric supply, housing affordability, childcare availability, workforce shortages and wage competitiveness, gaps in mental health and substance use services, and the region's exposure to federal spending reductions. Region 9 will also track how growth-related costs and revenues are distributed among jurisdictions, so that communities bearing the service impacts of major development are not left without the resources to meet them.

3. **Monitoring and Adapting to Emerging Trends (Economic, Technology, Environmental, Policy)**
   Region 9 will keep staff and partners informed about shifts in the economy, technology, policy, and the environment, including data center and cloud technology growth, artificial intelligence and automation, federal workforce and funding changes, energy demand, and climate-related hazards. Region 9 will use resources such as the WVU Bureau of Business and Economic Research's (BBER's) economic outlook reports, U.S. Census Bureau and Bureau of Labor Statistics data, and in-house IMPLAN economic impact modeling, and will share project and regional data through a public-facing ArcGIS dashboard as funding permits.

4. **Promoting a Positive Vision for the Region**
   Region 9 will continue to communicate and promote the region's assets and opportunities, including its location, diversified economy, outdoor recreation, historic downtowns, and workforce and education institutions, to attract outside investment, talent, and visitors. Working with local partners, Region 9 will support regional branding and coordinated marketing that counter negative perceptions of West Virginia, help retain young residents, and help new residents connect with their communities.

Strategic Direction / Action Plan

This report presents the findings of a regional research process and a broad stakeholder engagement effort. In August and September 2026, Region 9 held four SWOT workshops in Martinsburg with local governments, civic and nonprofit organizations, economic and workforce development partners, and tourism and small business leaders. An online survey gave stakeholders who could not attend a chance to contribute. Each recommendation in this report connects to the plan's vision:

To continuously improve the quality of life and economic vitality within Berkeley, Jefferson, and Morgan Counties.

Stakeholders described a region whose growth is both its greatest asset and its most pressing challenge. The Eastern Panhandle's location, diversified economy, and quality of place continue to draw people and investment. However, infrastructure, housing, workforce, and public funding have not kept pace. Five key themes emerged as the foundation for how this plan will pursue its vision, support economic growth, and strengthen resiliency:

✓ **Key Theme One: Infrastructure and Growth Capacity.** Transportation, water, sewer, electric power, broadband, and business-ready sites that can keep pace with growth.

✓ **Key Theme Two: Workforce, Education, and Wages.** Training and career pathways tied to employer needs, competitive wages, childcare, and keeping young people and skilled workers in the region.

✓ **Key Theme Three: Housing and Affordability.** Attainable housing for local workers, first-time buyers, and long-time residents as costs rise.

✓ **Key Theme Four: Quality of Life and Community Character.** Outdoor recreation, tourism, historic downtowns, and community assets that make the region a place people want to live, work, and visit.

✓ **Key Theme Five: Regional Competitiveness and Collaboration.** Coordinated planning, stronger fiscal tools, regional marketing, and unified advocacy so the region can compete with neighboring states and secure its fair share of state and federal investment.

Economic resilience runs through all five themes. That includes water supply, power capacity, natural hazards, and dependence on federal spending, as well as the region's ability to absorb and recover from economic shocks.

Goals, Objectives, and Strategies

The five key themes have been refined into a Strategic Direction / Action Plan with one goal for each theme. The objectives and strategies under each goal respond directly to the strengths, weaknesses, opportunities, and threats stakeholders identified in 2026, and they are designed to stay flexible as new needs and opportunities emerge. Strategies that support economic resilience are marked with the shield icon.

Goal 1: Build infrastructure and growth capacity that keeps pace with the region's growth		
Objective 1.A.	**Support an integrated, multimodal, and resilient transportation network**	
🛡	Strategy 1.A.1	Advocate for system preservation and capacity funding that reflects the region's population growth and vehicle miles traveled, including congestion relief on Interstate 81 and WV Route 9
	Strategy 1.A.2	Work with HEPMPO and local governments to advance locally prioritized projects through the Statewide Transportation Improvement Program benefit-cost evaluation process
🛡	Strategy 1.A.3	Support EPTA in completing its new transit center and identifying sustainable operating funding as federal operating support changes with urbanized area growth
	Strategy 1.A.4	Work with the States of West Virginia and Maryland to sustain and market MARC train service to the Eastern Panhandle
🛡	Strategy 1.A.5	Promote walking, biking, and trail connections between downtowns, parks, and regional trail networks
	Strategy 1.A.6	Support transportation planning, project funding, and public transit options in Morgan County, which is outside HEPMPO's jurisdiction
	Strategy 1.A.7	Pursue federal and state funding for local bridge repair and replacement
	Strategy 1.A.8	Support freight, rail, and logistics capacity that serves the region's industrial base
	Strategy 1.A.9	Help communities along the US 522 corridor plan for the traffic and business impacts of the Berkeley Springs bypass
	Strategy 1.A.10	Support the WV Division of Highways (WVDOH) in providing a reliable, consistent, and timely permitting process
Responsible Parties	WVDOH, HEPMPO, EPTA, WV State Rail Authority, Eastern WV Regional Airport Authority (EWVRAA), counties and municipalities, Region 9 (coordination and grant support)	
Cost Estimate	$10M–$30M over five years, combining capital, planning, and added transit operations (planning-level estimate)	

Possible Funding	USDOT BUILD, FHWA PROTECT and Transportation Alternatives (through WVDOH), FTA 5307/5311/5339, FAA AIP, CRISI, EDA Public Works, ARC, FEMA HMGP, state and local match
Timeframe	2027–2031. Planning and resilience assessment in Years 1–2, with capital projects phased through Year 5.
Desired Outcomes	Flood-vulnerable routes identified and mitigated. Expanded transit access to jobs. Improved MARC station access and stable or expanded service. Airport sites ready for development. More miles of trail and sidewalk connecting towns.

Objective 1.B.	**Improve, expand, and protect water, sewer, and stormwater infrastructure**	
	Strategy 1.B.1	Assist utilities with capital planning and asset management to right-size systems for projected regional demand
	Strategy 1.B.2	Support groundwater protection, source water planning, and water supply studies that account for the region's karst geology and new large-volume users
	Strategy 1.B.3	Facilitate public-private partnerships to extend water and sewer service to priority growth and development areas
	Strategy 1.B.4	Help local governments plan for long-term operations, maintenance, and replacement costs when pursuing capital grants
	Strategy 1.B.5	Continue coordinating with local governments on stormwater management and Chesapeake Bay requirements, including green infrastructure

Responsible Parties	Public service districts, municipal utilities, county commissions, WV Infrastructure and Jobs Development Council, WV DEP, WV Water Development Authority, Region 9 (coordination and grant support)
Cost Estimate	$40M–$100M over five years (planning-level estimate)
Possible Funding	Clean Water and Drinking Water SRFs, USDA Rural Development Water and Environmental Programs, WV Small Cities CDBG, EDA Public Works, ARC, FEMA HMGP, utility and local match
Timeframe	2027–2031. Asset assessments and capacity planning in Years 1–2, with rehabilitation, extension, and stormwater projects phased through Year 5.
Desired Outcomes	Added capacity for housing and business growth. Service extended to unserved and underserved areas. Less inflow and infiltration and fewer overflows. Stronger regulatory compliance, including Chesapeake Bay and MS4 requirements. Reduced localized flooding.

Objective 1.C.	**Ensure reliable electric power and energy capacity for future growth**	
	Strategy 1.C.1	Coordinate with utilities, developers, and local governments to identify electric capacity needs, including substations and transmission, well ahead of major development

	Strategy 1.C.2	Help local governments evaluate the utility, land use, workforce, and fiscal impacts of data centers and other large energy users
	Strategy 1.C.3	Encourage energy efficiency programs for local governments, businesses, and residents
	Strategy 1.C.4	Evaluate opportunities for natural gas and alternative energy expansion where they support economic development
Responsible Parties	Potomac Edison (FirstEnergy), WV Public Service Commission, WV Office of Energy, PJM Interconnection, county development authorities, major employers and site developers, Region 9 (coordination, site-readiness planning, and grant support)	
Cost Estimate	$5M–$20M in public and shared costs over five years for site-readiness and resilience work (planning-level estimate). Utility transmission and substation upgrades would be funded mostly through utility capital investment.	
Possible Funding	Utility capital investment, private developer and employer investment, EDA Public Works, WV Economic Development Authority (WVEDA), DOE Grid Resilience formula grants (through the WV Office of Energy), USDA Rural Energy for America Program, FEMA HMGP (backup power at critical facilities), local match	
Timeframe	2027–2031. Capacity and demand assessment for priority growth areas and industrial sites in Years 1–2, with substation, distribution, and backup power projects phased through Year 5.	
Desired Outcomes	Enough power capacity identified and delivered at priority industrial and commercial sites. Shorter timelines for new service connections. Fewer and shorter outages. Backup power at critical community facilities. Better energy efficiency for local businesses.	
Objective 1.D.	**Improve communication networks, including broadband, mobile service, and emergency communications**	
	Strategy 1.D.1	Pursue funding to close remaining gaps in fiber broadband and cellular coverage, prioritizing unserved and underserved rural areas
	Strategy 1.D.2	Foster relationships with service providers and encourage private-sector system expansion and upgrades
	Strategy 1.D.3	Support reliable, interoperable emergency communications for public safety agencies
	Strategy 1.D.4	Inform residents of available internet options, including low-cost affordability programs
	Strategy 1.D.5	Help local governments expand online services and strengthen cybersecurity
Responsible Parties	WV Office of Broadband, WV Broadband Enhancement Council, internet service providers and wireless carriers, county commissions, county 911 centers and emergency management agencies, WV Statewide Interoperable Radio Network, Region 9 (coordination, mapping, and grant support)	

Cost Estimate	$15M–$40M over five years, combining broadband buildout, tower and coverage improvements, and emergency communications upgrades (planning-level estimate)
Possible Funding	BEAD (through the WV Office of Broadband), USDA ReConnect, WV state broadband programs, ARC, EDA Public Works, FEMA Homeland Security Grant Program, private provider investment, local match
Timeframe	2027–2031. Coverage mapping and gap analysis for broadband, mobile service, and emergency radio in Years 1–2, with buildout and upgrade projects phased through Year 5.
Desired Outcomes	Unserved and underserved locations connected to high-speed broadband. Mobile coverage gaps closed, especially in rural areas. Reliable, interoperable emergency communications across all three counties. Redundant networks that keep businesses and public safety running during disasters. Higher broadband adoption among households and businesses.

Objective 1.E.	**Maintain an adequate supply of business-ready sites for manufacturing, technology, distribution, and commercial users**	
	Strategy 1.E.1	Evaluate sites for needed utilities and readiness, and identify funding to bring priority sites to shovel-ready status
	Strategy 1.E.2	Assist development authorities with feasibility studies, financial assessments, and shell building strategies
	Strategy 1.E.3	Inventory commercial and industrial real estate and match it to the needs of target industries
	Strategy 1.E.4	Coordinate infrastructure-led development so water, sewer, power, broadband, and transportation investments are aligned with priority sites
	Strategy 1.E.5	Support continued development of the Eastern WV Regional Airport, including aviation, aerospace, aircraft maintenance, and federal training opportunities

Responsible Parties	Berkeley County Development Authority, Jefferson County Development Authority, Morgan County Economic Development Authority, WV Department of Economic Development (WVDED), WVEDA, utilities, private developers and landowners, county planning commissions, WV DEP (brownfields), Region 9 (site inventory, coordination, and grant support)
Cost Estimate	$10M–$40M over five years for site assessments, due diligence, infrastructure extensions, and site preparation (planning-level estimate)
Possible Funding	EDA Public Works, ARC, EPA Brownfields Assessment, Cleanup, and RLF grants, WV Brownfields Assistance Centers, WVDED and WVEDA programs, USDA Rural Development, tax increment financing, private investment, local match
Timeframe	2027–2031. Regional site inventory and readiness ranking in Years 1–2, with due diligence, brownfield cleanup, and infrastructure extensions to priority sites phased through Year 5.

Desired Outcomes	A current regional inventory of available sites ranked by readiness. More sites with utilities, access, and due diligence in place. Brownfields returned to productive use. Shorter timelines from prospect inquiry to site selection. Jobs created and private investment attracted on developed sites.	
Objective 1.F.	**Strengthen the region's resilience to natural hazards and protect natural resources**	
	Strategy 1.F.1	Assist in implementing projects identified in the region's hazard mitigation plans, including the Berkeley-Morgan County Multi-Jurisdictional Hazard Mitigation Plan
	Strategy 1.F.2	Support flood mitigation, drought preparedness, and severe weather planning
	Strategy 1.F.3	Work with local emergency managers to strengthen disaster response capacity, including for growth- and tourism-related service demands
	Strategy 1.F.4	Support programs that maintain the region's air quality and protect its natural resources
Responsible Parties	County emergency management agencies and floodplain managers, WV Emergency Management Division, WV DEP, WV Division of Natural Resources (WVDNR), WV Conservation Agency and Eastern Panhandle Conservation District, USDA NRCS, county farmland protection boards, land trusts and watershed groups, Region 9 (hazard mitigation planning, floodplain coordination, and grant support)	
Cost Estimate	$10M–$30M over five years for planning, flood mitigation projects, conservation easements, and watershed improvements (planning-level estimate)	
Possible Funding	FEMA Hazard Mitigation Grant Program and Flood Mitigation Assistance, USDA NRCS (EQIP, RCPP, and watershed programs), EPA Chesapeake Bay and Section 319 grants, National Fish and Wildlife Foundation Chesapeake grants, Land and Water Conservation Fund, county farmland protection programs, EDA, local match	
Timeframe	2027–2031. Hazard mitigation plan update and vulnerability assessment in Years 1–2, with flood mitigation, conservation, and watershed projects phased through Year 5.	
Desired Outcomes	Updated and adopted hazard mitigation plan tied to economic development priorities. Fewer homes, businesses, and critical facilities exposed to flooding. More communities taking part in the NFIP Community Rating System. Acres of farmland, forest, and source water areas permanently protected. Improved water quality in local streams and the Potomac watershed. Businesses better prepared to keep operating through disasters.	

2: Develop a skilled workforce and career pathways that keep talent in the region

Objective 2.A.	**Expand workforce development aligned with employer needs**	
	Strategy 2.A.1	Support paid apprenticeships, internships, and Learn and Earn programs
	Strategy 2.A.2	Partner with Shepherd University, Blue Ridge Community and Technical College (BRCTC), James Rumsey Technical Institute (JRTI), Marshall University, and local school systems to align training with employer needs
	Strategy 2.A.3	Support aviation, aerospace, and air traffic control training pathways linked to the Eastern WV Regional Airport
	Strategy 2.A.4	Help residents use West Virginia Invest and other financial aid to earn credentials and degrees
	Strategy 2.A.5	Address shortages in skilled trades, health care, public safety, education, manufacturing, and hospitality
	Strategy 2.A.6	Support expansion of STEM and coding programs such as STEMforce and CodeForce
Responsible Parties	Local Workforce Development Board and WorkForce WV, BRCTC, Shepherd University, JRTI, county school systems (career and technical education), major employers and industry associations, chambers of commerce, registered apprenticeship sponsors, Region 9 (convening sector partnerships, coordination, and grant support)	
Cost Estimate	$5M–$15M over five years for training programs, equipment, apprenticeship expansion, and wraparound supports (planning-level estimate)	
Possible Funding	WIOA, U.S. Department of Labor (DOL) apprenticeship grants, ARC, EDA, Perkins CTE funds, WV Invests Grant, state workforce programs, employer investment and match, foundation funds	
Timeframe	2027–2031. Employer needs assessment and launch of sector partnerships in key industries in Years 1–2, with expanded training, apprenticeships, and career pathways phased through Year 5.	
Desired Outcomes	Active employer-led sector partnerships in priority industries. More residents earning industry-recognized credentials. More registered apprentices and work-based learning slots. Higher job placement and wage gains for program completers. Fewer hard-to-fill positions reported by employers.	
Objective 2.B.	**Improve wage competitiveness and career advancement**	
	Strategy 2.B.1	Support competitive pay for teachers, public safety personnel, and public sector employees relative to neighboring states
	Strategy 2.B.2	Use regional wage and occupational data to target growth in higher-wage industries
	Strategy 2.B.3	Encourage career pathways that allow workers in entry-level jobs to advance within the region
	Strategy 2.B.4	Support efforts to attract professional, technical, and headquarters-based employers

Responsible Parties	Major employers and industry associations, local Workforce Development Board and WorkForce WV, BRCTC, Shepherd University, JRTI, county development authorities, chambers of commerce, WV Department of Commerce, Region 9 (wage and commuting data, convening employers, and grant support)
Cost Estimate	$2M–$8M over five years for incumbent worker training, career pathway development, and business attraction targeting higher-wage industries (planning-level estimate)
Possible Funding	WIOA incumbent worker training, WV Governor's Guaranteed Work Force Program, ARC, EDA, DOL grants, employer investment and match, foundation funds
Timeframe	2027–2031. Regional wage and commuting analysis and employer outreach in Years 1–2, with career ladder programs, incumbent worker training, and targeted recruitment of higher-wage employers phased through Year 5.
Desired Outcomes	Regional median wages closing the gap with state and national benchmarks. Fewer residents commuting out of the region for higher-paying jobs. More incumbent workers upskilled and promoted. Clear career ladders in place with key employers. More higher-wage employers locating or expanding in the region.

Objective 2.C.	**Expand childcare and youth development capacity**	
	Strategy 2.C.1	Support public and private investment in childcare, including infant, early learning, and shift-work care
	Strategy 2.C.2	Support partnerships among school systems, the YMCA, the Boys and Girls Club, and other providers to expand early learning and youth services
	Strategy 2.C.3	Encourage employer-supported childcare models
	Strategy 2.C.4	Support youth programs that build skills and connect young people to local careers

Responsible Parties	WV Department of Human Services (WVDHS), Division of Early Care and Education, child care resource and referral agency, licensed childcare providers, Head Start and county pre-K programs, county school systems, employers, BRCTC (early childhood education training), WVU Extension and youth-serving nonprofits, Region 9 (needs assessment, coordination, and grant support)
Cost Estimate	$5M–$15M over five years for new and expanded facilities, provider startup support, early childhood workforce training, and youth programming (planning-level estimate)
Possible Funding	Child Care and Development Block Grant (through WVDHS), CDBG, USDA Community Facilities, ARC, WIOA Youth, federal employer-provided childcare tax credit (45F), employer partnerships, foundation funds, local match

Timeframe	2027–2031. Childcare supply and demand assessment and employer outreach in Years 1–2, with facility expansion, provider recruitment, and youth program growth phased through Year 5.
Desired Outcomes	More licensed childcare slots, especially for infants and toddlers and in rural areas. More credentialed early childhood educators. Employer-supported childcare partnerships in place. More youth taking part in after-school, summer, and career exploration programs. Fewer parents held out of the workforce by lack of childcare.

Objective 2.D.	**Support small businesses and entrepreneurs**	
	Strategy 2.D.1	Continue partnering with the Small Business Development Center (SBDC) and the state Office of Entrepreneurship to provide training, technical assistance, and access to capital
	Strategy 2.D.2	Support innovation, coworking, and entrepreneurship centers
	Strategy 2.D.3	Use Region 9's website and social media to promote business resources, training, and networking opportunities
	Strategy 2.D.4	Encourage participation in the Eastern Panhandle Entrepreneurs Forum, chambers of commerce, and young professional networks
	Strategy 2.D.5	Help small businesses prepare for and recover from disruptions, including federal shutdowns and changes in traffic patterns

Responsible Parties	WV SBDC, SCORE, Shepherd University, BRCTC, chambers of commerce, Main Street and ON TRAC programs, community development financial institutions and local lenders, county development authorities, Region 9 (coordination, access to capital, and grant support)
Cost Estimate	$3M–$10M over five years for loan capital, technical assistance, entrepreneurship programming, and downtown business support (planning-level estimate)
Possible Funding	SBA programs, USDA Rural Business Development Grants and Intermediary Relending Program, EDA Revolving Loan Fund capitalization, ARC, CDFI Fund, WVDED programs, private lender participation, foundation funds
Timeframe	2027–2031. Assessment of capital and technical assistance gaps in Years 1–2, with expanded lending, coaching, and entrepreneurship programs phased through Year 5.
Desired Outcomes	More new business starts and higher survival rates. More loans made and capital deployed to small businesses. Jobs created and retained by assisted businesses. More businesses owned by residents of underserved areas. Lower storefront vacancy in downtowns.

Goal 3: Expand attainable housing for the region's workforce and residents		
Objective 3.A.	**Increase the supply of attainable housing**	
	Strategy 3.A.1	Support starter homes, owner-occupied townhomes and condominiums, and other workforce housing
	Strategy 3.A.2	Encourage downtown housing, adaptive reuse, and mixed-use redevelopment
	Strategy 3.A.3	Help local governments review zoning and development standards that limit housing options
	Strategy 3.A.4	Pursue funding for the infrastructure needed to make housing development feasible
Responsible Parties	WV Housing Development Fund (WVHDF), county and municipal planning commissions, local housing authorities, nonprofit housing developers including Habitat for Humanity, private builders and developers, public service districts, employers, Region 9 (housing needs data, coordination, and grant support)	
Cost Estimate	$20M–$60M in public and shared costs over five years for new construction, rehabilitation, infrastructure to housing sites, and planning and zoning updates (planning-level estimate). Most construction costs would come from private and tax credit financing.	
Possible Funding	Low-Income Housing Tax Credits, HOME, CDBG, National Housing Trust Fund and WVHDF programs, USDA Rural Development housing programs, HUD PRO Housing, Federal Home Loan Bank of Pittsburgh Affordable Housing Program, employer investment, private financing, local match	
Timeframe	2027–2031. Regional housing needs assessment and review of zoning and development barriers in Years 1–2, with new construction, rehabilitation, and infrastructure to housing sites phased through Year 5.	
Desired Outcomes	More housing units affordable to working households. Zoning and subdivision updates that allow a wider mix of housing types. Older homes rehabilitated and kept in use. Fewer households spending more than 30 percent of income on housing. More workers able to live in the communities where they work.	
Objective 3.B.	**Protect housing affordability and stability**	
	Strategy 3.B.1	Support first-time homebuyer assistance and preserve CDBG-funded and other housing programs
	Strategy 3.B.2	Study the effects of investor purchases on housing availability and share findings with local governments
	Strategy 3.B.3	Support emergency, transitional, and supportive housing for vulnerable residents
	Strategy 3.B.4	Encourage housing rehabilitation programs that help long-time residents remain in their homes
Responsible Parties	WVHDF, local housing authorities, community action agency, Legal Aid of WV, WV Balance of State Continuum of Care and homeless service	

	providers, Habitat for Humanity and home repair programs, WVDHS, United Way, Region 9 (data, coordination, and grant support)
Cost Estimate	$5M–$20M over five years for home repair and weatherization, homebuyer and rental assistance, eviction and foreclosure prevention, and preservation of existing affordable units (planning-level estimate)
Possible Funding	CDBG, HOME, Weatherization Assistance Program, LIHEAP, Emergency Solutions Grants, HUD Continuum of Care, Housing Choice Vouchers, USDA Section 504 home repair, Federal Home Loan Bank of Pittsburgh programs, WVHDF homebuyer programs, foundation funds, local match
Timeframe	2027–2031. Assessment of cost burden, at-risk units, and housing instability in Years 1–2, with expanded repair, assistance, prevention, and preservation programs phased through Year 5.
Desired Outcomes	More homes repaired and weatherized so owners can stay in them. Fewer evictions and foreclosures. More first-time homebuyers assisted. Existing subsidized and naturally affordable units preserved. Fewer people experiencing homelessness. More older residents able to age in place.

Goal 4: Enhance quality of life and community character

Objective 4.A.	**Promote outdoor recreation, tourism, and wellness**	
	Strategy 4.A.1	Identify funding to market regional tourism, including multi-county and multi-state itineraries
	Strategy 4.A.2	Support a connected regional trail network linking downtowns, parks, the C&O Canal, the Western Maryland Rail Trail, and other destinations
	Strategy 4.A.3	Support public riverfront access and recreation
	Strategy 4.A.4	Support wellness and heritage tourism, including Berkeley Springs' spa and spring assets
	Strategy 4.A.5	Help parks and recreation agencies plan and fund facilities and programs for a growing population of all ages

Responsible Parties	County convention and visitors bureaus, WV Dept. of Tourism, WVDNR and State Parks (including Berkeley Springs and Cacapon), National Park Service (NPS) (Harpers Ferry and C&O Canal), Town of Bath and other municipalities, outfitters and tourism businesses, local health systems, Region 9 (coordination, Bath Wellness Village support, and grant support)
Cost Estimate	$5M–$20M over five years for trail and recreation facility improvements, wayfinding, marketing, and wellness-related destination projects (planning-level estimate)
Possible Funding	WV Dept. of Tourism grants and Tourism Development Act incentives, Recreational Trails Program, Land and Water Conservation Fund, ARC, EDA, USDA Rural Development, NPS partnership programs, hotel occupancy tax revenue, private and foundation funds, local match

Timeframe	2027–2031. Regional outdoor recreation and tourism asset inventory and Bath Wellness Village planning in Years 1–2, with trail, facility, wayfinding, and marketing projects phased through Year 5.
Desired Outcomes	Higher visitor spending and hotel occupancy tax revenue. More miles of connected trails and higher trail use. New and expanded outdoor recreation and wellness businesses. The region known as a destination for recreation and wellness, anchored by Berkeley Springs and Bath. Better access to outdoor activity and wellness resources for residents.

Objective 4.B.	**Revitalize downtowns and historic districts**	
	Strategy 4.B.1	Support Main Street and ON TRAC programs and downtown-first strategies
	Strategy 4.B.2	Advocate for lower investment thresholds for historic tax credits and tourism development incentives so smaller buildings can qualify
	Strategy 4.B.3	Help municipalities address vacant and neglected properties through code enforcement and redevelopment tools
	Strategy 4.B.4	Assist with the redevelopment and restoration of historic districts and underused properties
	Strategy 4.B.5	Coordinate regional event calendars to reduce scheduling conflicts and increase attendance

Responsible Parties	Municipalities, Main Street and ON TRAC programs, WV State Historic Preservation Office, local historic landmarks commissions, county development authorities, property owners and private developers, downtown businesses, Region 9 (coordination, brownfields, and grant support)
Cost Estimate	$10M–$30M in public and shared costs over five years for building rehabilitation, streetscape and public space improvements, brownfield cleanup, and façade programs (planning-level estimate). Much of the rehabilitation cost would come from private investment and historic tax credits.
Possible Funding	Federal and WV historic rehabilitation tax credits, CDBG, EPA Brownfields grants, ARC, EDA, USDA Rural Development, Certified Local Government grants, WV Main Street program support, Transportation Alternatives (streetscapes), private investment, local match
Timeframe	2027–2031. Downtown building inventory and identification of priority vacant and underused properties in Years 1–2, with rehabilitation, streetscape, and façade projects phased through Year 5.
Desired Outcomes	Vacant and underused historic buildings rehabilitated and reoccupied. More upper-floor housing downtown. Lower storefront vacancy and more new businesses. Private investment leveraged by public dollars. Historic character of downtowns preserved. More foot traffic and activity in town centers.

Objective 4.C.	**Support health, social services, and community needs**	
	Strategy 4.C.1	Support the growth of local health systems to attract and retain specialty care

	Strategy 4.C.2	Support mental health and substance use disorder treatment and recovery services
	Strategy 4.C.3	Support senior services and transportation access to critical services
	Strategy 4.C.4	Improve walkability to critical services
Responsible Parties	Local health systems, federally qualified health centers, county health departments, behavioral health and recovery providers including EastRidge Health Systems, WVDHS, community action agency, senior services organizations, food banks and faith-based groups, United Ways, EPTA (transportation to services), Region 9 (needs data, coordination, and grant support)	
Cost Estimate	$5M–$20M over five years for community facilities, expanded health and behavioral health access, recovery-to-work programs, and service coordination (planning-level estimate)	
Possible Funding	HRSA, SAMHSA, ARC (including INSPIRE recovery-to-work grants), USDA Community Facilities, CDBG, Community Services Block Grant, Older Americans Act, opioid settlement funds, United Way and foundation funds, local match	
Timeframe	2027–2031. Community needs assessment and service gap mapping with health and social service partners in Years 1–2, with facility, access, and program expansions phased through Year 5.	
Desired Outcomes	Better access to primary and behavioral health care, especially in rural areas. More people in recovery connected to training and jobs. Lower food insecurity. Improved transportation access to medical and social services. Community facilities that meet growing demand. Better coordination among service providers.	
Objective 4.D.	**Encourage community involvement and a regional sense of pride**	
	Strategy 4.D.1	Continue to support farm-to-table initiatives and farmers markets
	Strategy 4.D.2	Coordinate the promotion of volunteer opportunities in communities
	Strategy 4.D.3	Encourage partnerships between local governments and nonprofits that provide services to residents
	Strategy 4.D.4	Help new residents connect with community resources and local government
Responsible Parties	Region 9 (convening, regional messaging, and CEDS engagement), county commissions and municipalities, chambers of commerce, convention and visitors bureaus, community leadership programs, Shepherd University and county school systems, arts and humanities councils, civic and volunteer organizations, Eastern WV Community Foundation, local media	
Cost Estimate	$500K–$2M over five years for regional identity and outreach campaigns, leadership development, community events, and engagement tools (planning-level estimate)	

Possible Funding	EDA Partnership Planning, ARC, WV Humanities Council, WV Commission on the Arts, National Endowment for the Arts, WV Community Development Hub, Eastern WV Community Foundation and other foundation funds, business sponsorships, local match
Timeframe	2027–2031. Regional identity effort and engagement plan in Years 1–2, with leadership programs, outreach campaigns, and community events ongoing through Year 5.
Desired Outcomes	More residents taking part in CEDS implementation and local planning. More graduates of community leadership programs serving on boards and commissions. Growth in volunteer participation. A shared regional identity used across the three counties. Higher resident pride and satisfaction in community surveys.

Goal 5: Strengthen regional competitiveness and collaboration

Objective 5.A.	**Market the region and advocate for its needs**	
	Strategy 5.A.1	Continue to manage the Eastern West Virginia Economic Alliance to market the region to businesses and site selectors
	Strategy 5.A.2	Develop regional branding and ambassador initiatives that counter negative perceptions and attract young talent
	Strategy 5.A.3	Maintain regular communication with state legislators and leadership on the region's needs, contributions, and successes
	Strategy 5.A.4	Promote tax incentive programs such as Opportunity Zones, New Markets Tax Credits, and HUBZones
	Strategy 5.A.5	Leverage Ascend West Virginia and other talent attraction programs

Responsible Parties	Region 9 (regional advocacy agenda, coordination, and data), county development authorities, WVDED, convention and visitors bureaus, chambers of commerce, HEPMPO, WV Association of Regional Councils, business and civic leaders, state legislative and congressional delegations
Cost Estimate	$1M–$3M over five years for regional marketing materials and website, data and site information for prospects, trade show and site selector outreach, and advocacy activities (planning-level estimate)
Possible Funding	EDA Partnership Planning, ARC, WVDED and WV Dept. of Tourism matching programs, county and municipal contributions, private sponsorships, local match
Timeframe	2027–2031. Regional marketing plan and annual advocacy agenda developed in Years 1–2, with marketing campaigns, site selector outreach, and legislative advocacy ongoing through Year 5.
Desired Outcomes	More business leads, prospect inquiries, and site visits. More projects locating or expanding in the region. Regional priorities reflected in state and federal policy and budgets. More state and federal funding secured for regional projects. A consistent regional message used by all partners.

Objective 5.B.	**Strengthen local fiscal capacity**	
	Strategy 5.B.1	Evaluate limits on local revenue authority and support tools that allow growing communities to fund services and infrastructure
	Strategy 5.B.2	Advocate for distribution of revenue from large developments, such as data centers, that reflects their service impacts on neighboring municipalities
	Strategy 5.B.3	Advocate for a fairer return of state revenue to the Eastern Panhandle and adequate state funding for economic development districts
	Strategy 5.B.4	Identify non-local match sources for federal and state grants, including foundations
	Strategy 5.B.5	Evaluate Home Rule options and support local governments where able
Responsible Parties	County commissions, municipalities, public service districts, WV State Auditor's Office (Local Government Services), WV Municipal League, County Commissioners' Association of WV, Region 9 (grant writing, grant administration, and technical assistance)	
Cost Estimate	$1M–$3M over five years for grant writing and administration support, capital improvement planning, utility rate studies, and financial management training (planning-level estimate)	
Possible Funding	EDA Partnership Planning and Local Technical Assistance, ARC (including READY Local Governments), USDA Rural Development technical assistance, WV Community Development Hub, foundation funds, local match	
Timeframe	2027–2031. Assessment of local government fiscal and grant capacity in Years 1–2, with capital improvement planning, rate studies, training, and expanded grant support ongoing through Year 5.	
Desired Outcomes	More state and federal funding secured by local governments. Capital improvement plans adopted and used for budgeting. Utility rates that support long-term system costs. Fewer audit findings and stronger financial management. Local governments able to provide match and manage grants without delays.	
Objective 5.C.	**Coordinate planning and regional solutions**	
	Strategy 5.C.1	Help local governments align land use, zoning, and development standards across jurisdictions
	Strategy 5.C.2	Support comprehensive plan updates and provide IMPLAN economic impact modeling to member governments
	Strategy 5.C.3	Encourage continued partnerships with Maryland, Virginia, and Pennsylvania
	Strategy 5.C.4	Support public-private partnerships that combine private investment with public infrastructure
	Strategy 5.C.5	Monitor the region's exposure to federal spending reductions and develop response strategies with partners
	Strategy 5.C.6	Support public safety capacity that keeps pace with growth

Responsible Parties	Region 9 (lead convener and CEDS administrator), CEDS Strategy Committee, county commissions and municipalities, county and municipal planning commissions, HEPMPO, public service districts, county development authorities, local Workforce Development Board, emergency management agencies, neighboring regional councils and Maryland and Virginia partners
Cost Estimate	$1M–$3M over five years for regional planning studies, shared data and GIS tools, plan alignment, and convening (planning-level estimate)
Possible Funding	EDA Partnership Planning, ARC, FHWA and FTA planning funds (through HEPMPO), FEMA hazard mitigation planning funds, USDA Rural Development, WV Community Development Hub, local match
Timeframe	2027–2031. Review of county, municipal, transportation, hazard mitigation, and workforce plans for alignment with the CEDS in Years 1–2, with shared data tools, joint studies, and regular regional convenings ongoing through Year 5.
Desired Outcomes	Local and regional plans aligned with CEDS goals. Shared regional data and GIS tools used by all partners. More multi-jurisdictional projects and joint funding applications. Less duplication of effort across the three counties. Regular coordination with neighboring regions in Maryland and Virginia on shared issues.

Evaluation Framework

Region 9 will use the following measures to track how well it carries out the CEDS and how the regional economy changes over the 2027–2031 planning period. Performance Measures track Region 9's own work and overall economic results. Key Theme Indicators track progress on each of the plan's five goals. Region 9 will report on these measures in each annual CEDS update.

Performance Measures

1. Jobs and Employment
   a. Total employment in the base year (2026) and each following year
   b. Jobs created or retained by projects Region 9 helped develop or fund
2. Public Investment in the Region
   a. Number and value of EDA-funded investments
   b. Number and value of other federal, state, local, and foundation investments
   c. Number of funding applications Region 9 prepared and submitted, and the number and value awarded
3. Private Investment in the Region
   a. Private investment leveraged by projects Region 9 helped develop or fund
   b. Major private investment announcements in the region
4. Region 9 Project Activity
   a. Number and value of active projects managed
   b. Value of active projects managed per dollar of local assessment dues
   c. Technical assistance provided, including comprehensive plans supported, IMPLAN analyses completed, and intergovernmental reviews completed
5. Gross Domestic Product growth for Berkeley, Jefferson, and Morgan Counties

Key Theme Indicators

1. Infrastructure and Growth Capacity
   a. Share of homes and businesses with high-speed broadband, and remaining unserved locations
   b. Number of transportation projects in the region programmed in the Statewide Transportation Improvement Program
   c. EPTA and MARC ridership in the Eastern Panhandle
   d. Public water and sewer service area and capacity added
   e. Number and acreage of business-ready and WV READY certified sites
   f. Hazard mitigation plan projects completed
2. Workforce, Education, and Wages
   a. Labor force participation rate
   b. Average annual wage compared with neighboring Maryland, Virginia, and Pennsylvania counties
   c. Share of employed residents working outside West Virginia
   d. High school graduation rates

e. Higher education and industry credential attainment
f. Licensed childcare capacity compared with the number of children under age 5

3. Housing and Affordability
   a. Median home sale price and median rent
   b. Share of households spending more than 30% of income on housing
   c. New housing units permitted, by type
   d. Homeownership rate
4. Quality of Life and Community Character
   a. Median household income
   b. Share of residents living in poverty
   c. Median age and share of the population aged 25 to 34
   d. Visitor spending and tourism employment
   e. Miles of trails and greenways
   f. Access to mental health and substance use treatment providers
   g. Air quality, water quality, and Chesapeake Bay restoration progress
5. Regional Competitiveness and Collaboration
   a. Population growth compared with the state
   b. Business prospects and site selection inquiries handled through the Eastern West Virginia Economic Alliance
   c. Unemployment rate compared with the state and the nation
   d. Share of regional employment in federal government and federal contracting, as a measure of exposure to federal spending changes

Technical Report

People of the Region



Photo 1: Shepherdstown, West Virginia

Growth Trend 1: Population

Table 1 presents population trends for Berkeley, Jefferson, and Morgan counties, Region 9, West Virginia, and the United States from 2010 through 2031. As of the 2020 Census, Region 9 had a population of 196,840, representing a 12.35% increase since 2010. Growth is expected to continue, with the region projected to reach 220,651 residents by 2031. Berkeley County, the region's largest county, has driven much of this growth, increasing by 17.2% between 2010 and 2020 and projected to grow another 7.08% between 2025 and 2031. Jefferson County grew by 7.9% during the last decade and is projected to experience the fastest future growth in the region, increasing by 8.90% through 2031. Morgan County, the region's smallest county, declined by 2.73% between 2010 and 2020 and is projected to experience a slight decline of 0.32% between 2025 and 2031. Overall, Region 9 is projected to grow by 7.00% between 2025 and 2031. This contrasts sharply with West Virginia, whose population declined by 3.20% between 2010 and 2020 and is projected to decline by an additional 1.53% through 2031. By comparison, the United States population increased by 6.85% from 2010 to 2020 and is projected to grow by 4.52% between 2025 and 2031.

TABLE 1: POPULATION IN REGION 9, WEST VIRGINIA, AND THE UNITED STATES, 2010 - 2031

	Berkeley County	Jefferson County	Morgan County	Region Total	West Virginia	United States
2010 (Actual)	104,169	53,498	17,541	175,208	1,852,994	308,745,538
2020 (Actual)	122,076	57,701	17,063	196,840	1,793,716	331,449,281
2025 (Estimate)	139,522	63,102	18,027	220,651	1,766,147	341,784,857
2031 (Projected)	149,400	68,716	17,970	236,086	1,739,195	357,222,715
Percent Change, 2010 - 2020	17.20%	7.90%	-2.73%	12.35%	-3.20%	6.85%
Projected Percent Change, 2025 - 2031	7.08%	8.90%	-0.32%	7.00%	-1.53%	4.52%
Projected Percent Annual Change, 2025 - 2031	1.18%	1.48%	-0.05%	1.17%	-0.26%	0.75%

Sources: Quick Facts U.S. Census Bureau; Esri ArcGIS Business Analyst; United Nations World Population Prospects; Aterio

Growth Trend 2: Changing Age Composition

While Region 9 has a population that is gradually aging, overall, it is younger than the state.[1] In Table 2, we present the median age in Berkeley County, Jefferson County, Morgan County, West Virginia, and the United States from 2010 – 2024. From 2020 - 2024, Berkeley County's median age decreased by 0.4 years, while the median ages in Jefferson and Morgan Counties rose by 0.1 years and 0.3 years, respectively. Morgan County's older age profile, including the highest share of residents aged 65 and older[2], highlights the importance of maintaining services such as senior centers, healthcare providers, and long-term care facilities.

As of 2024, Berkeley County had the youngest population in the region and a median age slightly below the national average. Jefferson County's median age remained below the statewide median, while Morgan County's median age was considerably higher than regional, state, and national averages. Despite its older population, Morgan County's share of residents in their prime working years (ages 25 to 54) remains slightly more comparable to West Virginia as a whole.[3].

TABLE 2: MEDIAN AGE IN REGION 9, WEST VIRGINIA, AND THE UNITED STATES, 2000 - 2024

	Berkeley County	Jefferson County	Morgan County	West Virginia	United States
2010	37.1	38.4	43.5	41.1	36.9
2020	38.9	40.9	48.5	42.7	38.2
2024	38.5	41.0	48.8	42.7	38.9
Percent Change 2010 to 2020	4.9%	6.5%	11.5%	3.9%	3.5%
Percent Change 2020 to 2024	-1.0%	0.2%	0.6%	0.0%	1.8%
% of Population between 25-34 years old	14.4%	11.0%	10.9%	12.0%	13.7%
Amount of Population between 25-34 years old	18,766	6,530	1,890	212,704	45,806,540
% of Population between 25-54 years old	41.0%	38.1%	34.6%	36.6%	39.1%
% of Population 65 and older	15.3%	17.3%	25.2%	21.0%	17.2%
Amount of Population 65 years and older	19,771	10,262	4,386	374,092	57,633,628

Source: U.S. Census Bureau, ACS 5-Year, 2024

[1] Deskins, J. and Lego, B. (2023) The Eastern Panhandle Economic Outlook, 2023 – 2027. WVU Bureau of Business & Economic Research

[2] Ibid., 4

[3] Ibid., 4

Growth Trend 3: Educational Attainment

In general, Region 9, West Virginia, and the nation are becoming more educated. Table 3 presents educational attainment data for residents age 25 and older in Berkeley County, Jefferson County, Morgan County, West Virginia, and the United States. Berkeley and Jefferson Counties exceed the state average in bachelor's degree attainment, with 16.4 percent and 21.3 percent, respectively, compared to 14.4 percent statewide. Morgan County experienced a slight decline in bachelor's degree attainment but saw increases in associate's, graduate, and professional degrees. There is an opportunity for local leaders and education providers to engage the "high school graduate" and "some college, no degree" cohorts about the benefits and affordability of local community and technical colleges, supporting the CEDS goals of expanding educational opportunities and developing a qualified workforce.

Berkeley and Jefferson counties have made strong improvements in their high school graduation rates. In 2014, 13.6 percent of adults age 25 and older in Berkeley County had not completed high school; by 2024, that share had fallen to 9.1 percent. Jefferson County experienced a similar decline, from 11.9 percent to 9.9 percent, while Morgan County saw the largest reduction, from 18.0 percent to 11.0 percent. These improvements exceeded the national decline and were comparable to or greater than improvements observed statewide, representing an opportunity for local employers seeking a workforce with higher levels of educational attainment.

TABLE 3: EDUCATIONAL ATTAINMENT- POPULATION 25 YEARS AND OVER (YEAR 2014, 2024)

Year	Berkeley County	Jefferson County	Morgan County	West Virginia	United States
% Population Age 25+ - less than HS					
2014	13.6%	11.9%	18.0%	15.5%	13.6%
2024	9.1%	9.9%	11.0%	10.7%	10.4%
% Change	-33.1	-16.8	-63.6	-31.0	-23.5
% Population Age 25+ - High School Graduate (or equivalency)					
2014	37.8%	33.2%	44.5%	40.9%	28.0%
2024	36.0%	28.9%	43.2%	39.3%	26.0%
% Change	-4.8	-13.0	-2.9	-3.9	-7.1
% Population Age 25+ - Some College (no degree)					
2014	21.5%	19.7%	13.7%	18.4%	21.2%
2024	20.3%	19.0%	18.8%	17.5%	19.1%
% Change	-5.6	-3.6	37.2	-4.9	-9.9
% Population Age 25+ - Associate's Degree					
2014	6.8%	6.8%	7.3%	6.4%	7.9%
2024	9.5%	8.3%	9.0%	8.4%	8.8%
% Change	39.7	22.1	23.3	31.3	11.4
% Population Age 25+ - Bachelor's Degree					
2014	12.9%	18.2%	10.2%	11.6%	18.3%
2024	16.4%	21.3%	8.7%	14.4%	21.6%
% Change	27.1	17.0	-7.5	24.1	18.0%
% Population Age 25+ - Graduate or Professional Degree					
2014	7.3%	10.1%	6.3%	7.2%	11.0%
2024	8.7%	12.6%	9.4%	9.7%	14.1%
% Change	19.2	24.8	23.7	34.7	28.2

Source: U.S. Census Bureau ACS 5-Year, 2014, 2024 – S1501: Educational Attainment

Growth Trend 4: Median Income by Educational Attainment

Typically, individuals with higher educational attainment earn more than individuals with lower educational attainment, as educational attainment correlates with higher potential productivity. In Table 4, we present median income levels by educational attainment not only for Berkeley County, Jefferson County, Morgan County, West Virginia, and the United States, but also for the neighboring counties of Washington County, MD and Frederick County and Loudoun County, VA, given that over 48% of Eastern Panhandle residents hold jobs outside of the state.

In Region 9, Berkeley and Jefferson Counties continue to report higher median incomes than West Virginia as a whole. Across all educational attainment levels, median income in 2024 was

$51,570 in Berkeley County and $59,796 in Jefferson County, compared to $45,862 statewide. These figures are similar to neighboring Washington County, Maryland ($53,340) and Frederick County, Virginia ($59,586), while remaining well below Loudoun County, Virginia's $97,873. Morgan County's median income reached $45,810, nearly matching the statewide average.

Median incomes increased substantially between 2014 and 2024 across the region. Earnings for all workers age 25 and older rose 39.2% in Berkeley County, 44.5% in Jefferson County, and 46.1% in Morgan County. These gains were generally comparable to neighboring counties and the nation, where incomes grew 43.8% in Washington County, 49.9% in Frederick County, 50.0% in Loudoun County, 45.2% statewide, and 46.2% nationally. Despite strong growth, significant income differences remain between Region 9 and parts of the Washington D.C. metropolitan area, particularly Loudoun County.

Income growth among individuals with some college education or an associate degree was especially notable in Morgan County. Median income for this group increased from $26,396 in 2014 to $42,242 in 2024, a 60.0% gain. Berkeley County experienced growth of 34.3%, rising to $51,130, while Jefferson County increased 27.9% to $57,017. Morgan County's growth exceeded that of neighboring counties, West Virginia (39.9%), and the United States (39.0%), while Berkeley and Jefferson Counties posted more moderate gains.

TABLE 4: MEDIAN INCOME BASED ON LEVEL OF EDUCATIONAL ATTAINMENT (YEAR 2014, 2024)

Location	2014	2024	% Change
Median Income -Age 25+, less than HS			
Berkeley County, WV	$24,054	$35,669	48.3
Jefferson County, WV	$20,724	$37,358	80.3
Morgan County, WV	$18,702	$44,537	138.1
Washington County, MD	$24,719	$38,422	55.4
Frederick County, VA	$27,397	$40,988	49.6
Loudoun County, VA	$25,309	$36,847	45.6
West Virginia	$19,675	$28,863	46.7
United States	$19,954	$32,485	62.8
Median Income -Age 25+ - High School Graduate (or equivalency)			
Berkeley County, WV	$30,921	$47,086	52.3
Jefferson County, WV	$31,504	$42,991	36.5
Morgan County, WV	$31,696	$42,870	35.3
Washington County, MD	$30,826	$43,545	41.3
Frederick County, VA	$31,781	$51,184	61.1
Loudoun County, VA	$34,956	$47,983	37.3
West Virginia	$26,843	$37,352	39.1
United States	$27,868	$40,153	44.1

Median Income -Age 25+ - Some College (no degree) or Associates			
Berkeley County, WV	$38,060	$51,130	34.3
Jefferson County, WV	$44,564	$57,017	27.9
Morgan County, WV	$26,396	$42,242	60.0
Washington County, MD	$37,128	$51,400	38.4
Frederick County, VA	$37,526	$55,687	48.4
Loudoun County, VA	$51,015	$65,400	28.2
West Virginia	$30,125	$42,135	39.9
United States	$33,988	$47,260	39.0
Median Income -Age 25+ - Bachelor's Degree			
Berkeley County, WV	$47,330	$58,772	24.2
Jefferson County, WV	$56,017	$71,793	28.2
Morgan County, WV	$40,715	$52,218	28.3
Washington County, MD	$52,500	$75,613	44.0
Frederick County, VA	$55,726	$80,314	44.1
Loudoun County, VA	$80,225	$113,064	40.9
West Virginia	$42,190	$57,259	35.7
United States	$50,515	$70,044	38.7
Median Income -Age 25+ - Graduate or Professional Degree			
Berkeley County	$55,063	$74,729	35.7
Jefferson County	$71,647	$90,063	25.7
Morgan County	$51,157	$69,646	36.1
Washington County, MD	$66,275	$81,145	22.4
Frederick County, VA	$65,187	$80,847	24.0
Loudoun County, VA	$101,342	$133,720	31.9
West Virginia	$54,114	$71,098	31.4
United States	$66,944	$90,720	35.5
Median Income –Age 25+ - All (with earnings)			
Berkeley County	$37,069	$51,570	39.2
Jefferson County	$41,369	$59,796	44.5
Morgan County	$31,351	$45,810	46.1
Washington County, MD	$37,085	$53,340	43.8
Frederick County, VA	$39,747	$59,586	49.9
Loudoun County, VA	$65,259	$97,873	50.0
West Virginia	$31,582	$45,862	45.2
United States	$36,034	$52,696	46.2

Source: U.S. Census Bureau, ACS 5 Year, 2014, 2024 – S2001: Earnings in the Past 12 Months (in 2014 & 2024 Inflation-Adjusted Dollars, respectively)

Economic Resilience

Job Trends

The economic performance and potential of a region can be characterized by the composition of employment by industry. In Table 5, we present total employment by industry in Berkeley, Jefferson, and Morgan Counties as of Q4 2025, as well as each sector's contribution to overall regional employment. The data for this analysis are derived from the U.S. Census Bureau's Quarterly Workforce Indicators.

The industry with the highest employment in Region 9 is **Accommodation and Food Services**, accounting for 15.0% of all jobs in the region. The second-largest sector is **Retail Trade**, representing 14.5% of regional employment, followed closely by **Health Care and Social Assistance** at 14.2%. **Manufacturing** is also a major employer, accounting for 10.1% of jobs. Together, these four sectors provide more than half of all jobs in Region 9 (53.8%).

The counties composing Region 9 differ significantly in their dominant industries. **Berkeley County** reported 31,881 jobs in Q4 2025. The largest employment sector was **Health Care and Social Assistance** (5,103 jobs, or 16.0% of total employment), followed by **Retail Trade** (4,625 jobs, or 14.5%), **Manufacturing** (4,099 jobs, or 12.9%), **Accommodation and Food Services** (3,527 jobs, or 11.1%), and **Professional, Scientific, and Technical Services** (2,317 jobs, or 7.3%). Together, these five sectors accounted for nearly 62% of all employment in the county.

Jefferson County reported 14,239 jobs in Q4 2025. The leading industry was **Accommodation and Food Services** (3,508 jobs, or 24.6% of total employment), followed by **Retail Trade** (1,997 jobs, or 14.0%), **Professional, Scientific, and Technical Services** (1,428 jobs, or 10.0%), **Health Care and Social Assistance** (1,316 jobs, or 9.2%), and **Administrative and Support and Waste Management and Remediation Services** (858 jobs, or 6.0%). Together, these sectors accounted for almost 64% of county employment.

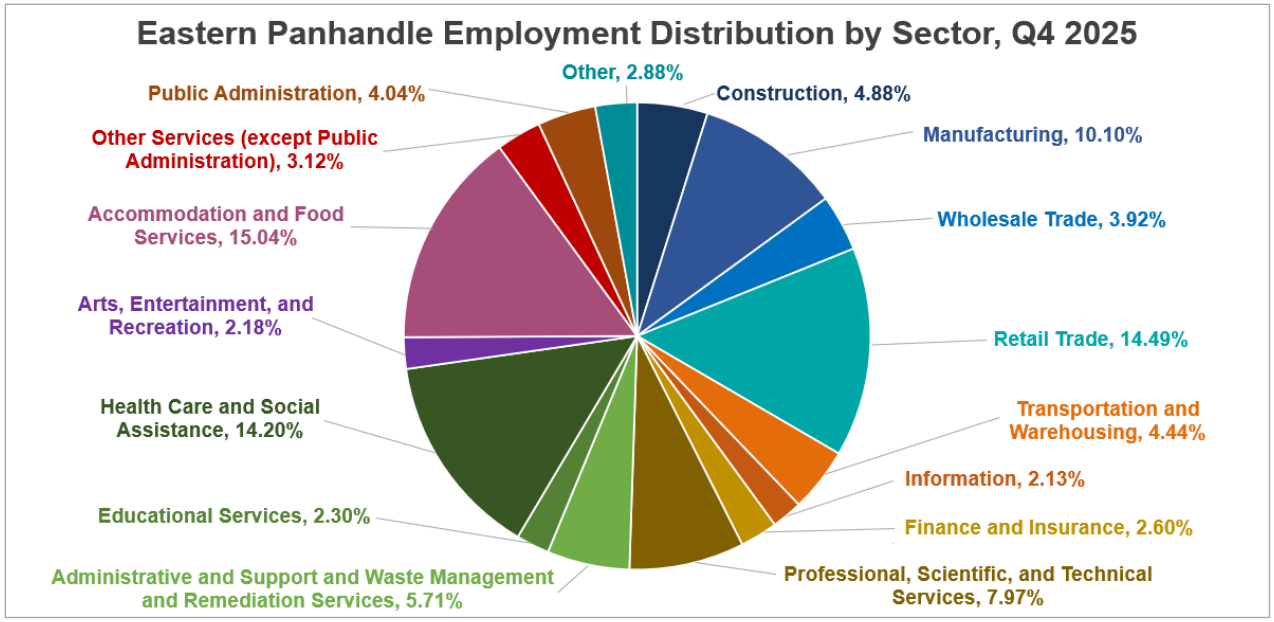
Morgan County reported 2,850 jobs in Q4 of 2025. The largest employment sector was **Health Care and Social Assistance** (536 jobs, or 18.8% of total employment), followed by **Retail Trade** (475 jobs, or 16.7%), **Public Administration** (362 jobs, or 12.7%), **Accommodation and Food Services** (331 jobs, or 11.6%), and **Manufacturing** (260 jobs, or 9.1%). Together, these sectors accounted for nearly 69% of county employment. The prominence of health care and public administration reflects the county's older population and the importance of public-sector employment within the local economy.

TABLE 5: TOTAL EMPLOYMENT BY PRIVATE AND PUBLIC SECTORS (Q4 YEAR 2025)

Industry	Berkeley County	Jefferson County	Morgan County	Total	Regional Share of Job Market by Sector
Agriculture, Forestry, Fishing and Hunting	217	59	52	328	0.67%
Mining, Quarrying, and Oil and Gas Extraction	Data Unavailable	9	Data Unavailable	9	0.02%
Utilities	114	18	20	152	0.31%
Construction	1,498	720	172	2,390	4.88%
Manufacturing	4,099	585	260	4,944	10.10%
Wholesale Trade	1,370	505	44	1,919	3.92%
Retail Trade	4,625	1,997	475	7,097	14.49%
Transportation and Warehousing	2,119	46	11	2,176	4.44%
Information	748	223	70	1,041	2.13%
Finance and Insurance	734	457	81	1,272	2.60%
Real Estate and Rental and Leasing	322	247	39	608	1.24%
Professional, Scientific, and Technical Services	2,317	1,428	156	3,901	7.97%
Management of Companies and Enterprises	252	51	11	314	0.64%
Administrative and Support and Waste Management and Remediation Services	1,865	858	75	2,798	5.71%
Educational Services	411	681	32	1,124	2.30%
Health Care and Social Assistance	5,103	1,316	536	6,955	14.20%
Arts, Entertainment, and Recreation	650	400	19	1,069	2.18%
Accommodation and Food Services	3,527	3,508	331	7,366	15.04%
Other Services (except Public Administration)	908	518	104	1,530	3.12%
Public Administration	1,002	613	362	1,977	4.04%

Source: U.S. Census Bureau, Quarterly Workforce Indicators.
Beginning of Q4 2025 Employment: NAICS Sectors

FIGURE 1: EASTERN PANHANDLE EMPLOYMENT DISTRIBUTION BY SECTOR, Q4 2025



Source: U.S. Census Bureau, Quarterly Workforce Indicators

Note: All sectors with less than 2% of Region 9's employment have been combined into the "Other" category.

Regional Competitiveness Effect

The local economic landscape changes over time, with certain industries becoming more – or less – dominant. In order to capture the extent to which industries in Region 9 are growing (or shrinking) relative to the country as a whole, we calculate the "regional competitiveness effect." **This is calculated as the difference in percentage growth for a given industry from 2023 Q4 – 2025 Q4 for Region 9 compared to the country as a whole**.

A positive number indicates that a sector grew faster in Region 9 than it did in the nation from 2023 Q4 – 2025 Q4 and is therefore considered a *leading industry*. A negative number indicates either slower growth or decline of an industry in the region and is therefore considered a *lagging industry*. We present top leading and lagging industries in Table 6 below.

The three strongest-performing industries in Region 9 were **Manufacturing**, which grew 10.16 percentage points faster than the national average; **Professional, Scientific, and Technical Services**, which outpaced national growth by 9.58 percentage points; and **Educational Services**, which grew 7.05 percentage points faster than the nation as a whole. In contrast, the most lagging industries were **Transportation and Warehousing**, which grew 14.13 percentage points more slowly than the national average; **Agriculture, Forestry, Fishing and Hunting**, which trailed national growth by 8.61 percentage points; and **Mining, Quarrying, and Oil and Gas Extraction** and **Utilities**, which both lagged behind the national average by 7.66 percentage points.

TABLE 6: COMPETITIVENESS EFFECT Q4 2023 to Q4 2025

Leading Industries	Regional Job Sector Growth vs Nation
Manufacturing	10.16%
Professional, Scientific, and Technical Services	9.58%
Educational Services	7.05%
Finance and Insurance	4.99%
Retail Trade	4.82%
Wholesale Trade	4.76%
Construction	4.61%
Real Estate and Rental and Leasing	2.58%
Arts, Entertainment, and Recreation	1.84%
Management of Companies and Enterprises	1.08%
Accommodation and Food Services	0.10%
Health Care and Social Assistance	0.05%
Lagging Industries	
Other Services (except Public Administration)	-0.37%
Information	-0.62%
Administrative and Support and Waste Management and Remediation Services	-2.91%
Mining, Quarrying, and Oil and Gas Extraction	-7.66%
Utilities	-7.66%
Agriculture, Forestry, Fishing and Hunting	-8.61%
Transportation and Warehousing	-14.13%

Source: U.S. Census Bureau, Quarterly Workforce Indicators
Note: no data available for Public Administration.

Location Quotient

The location quotient (LQ) is a way of quantifying how concentrated a particular industry is in one area compared to a larger region. **In this analysis, industry employment in the three-county region is compared to industry employment in the state of West Virginia.** An LQ of greater than 1 means the region has a higher concentration of jobs in a given industry than the state, and an LQ of less than 1 means the state as a whole has a higher concentration of jobs in an industry than does Region 9. Industries with a high LQ value are typically exporting industries and are important because they bring income into the region.

Table 7 demonstrates the difference in industry employment between Region 9 and the state of West Virginia. Industries with an LQ of greater than 1 are highlighted and represent the industries in which Region 9 has a high concentration of workers, and therefore, a competitive advantage. **The LQ indicator should be used with other indicators to determine a total picture of an industry.** For instance, Agriculture, Forestry, Hunting, and Fishing (LQ=2.16) is showing strength locally when compared to the state, but lags when compared to national growth (Table 6). This number can also reaffirm the strongest industries in Region 9. For instance, Educational Services and Professional, Scientific, and Technical Services both have high LQs and are **Leading Industries** when compared to the Nation.

TABLE 7: REGIONAL LOCATION QUOTIENT (YEAR 2023)

Jobs by Industry Type	Region 9		West Virginia		LQ
	Employment	% of Total	Employment	% of Total	
Agriculture, Forestry, Fishing and Hunting	328	0.70%	1,829	0.32%	2.16
Educational Services	1,124	2.39%	6,827	1.21%	1.98
Information	1,041	2.22%	7,763	1.37%	1.61
Professional, Scientific, and Technical Services	3,901	8.30%	30,435	5.38%	1.54
Transportation and Warehousing	2,176	4.63%	17,230	3.05%	1.52
Accommodation and Food Services	7,366	15.67%	63,836	11.29%	1.39
Arts, Entertainment, and Recreation	1,069	2.27%	9,575	1.69%	1.34
Manufacturing	4,944	10.52%	46,097	8.15%	1.29
Wholesale Trade	1,919	4.08%	19,469	3.44%	1.19
Retail Trade	7,097	15.10%	75,552	13.36%	1.13
Real Estate and Rental and Leasing	608	1.29%	6,719	1.19%	1.09
Administrative and Support and Waste Management and Remediation Services	2,798	5.95%	33,539	5.93%	1.00
Other Services (except Public Administration)	1,530	3.26%	18,400	3.25%	1.00
Finance and Insurance	1,272	2.71%	18,269	3.23%	0.84
Construction	2,390	5.09%	37,785	6.68%	0.76
Health Care and Social Assistance	6,955	14.80%	140,355	24.82%	0.60
Management of Companies and Enterprises	314	0.67%	7,601	1.34%	0.50
Utilities	152	0.32%	5,221	0.92%	0.35
Mining, Quarrying, and Oil and Gas Extraction	9	0.02%	18,996	3.36%	0.01

Source: U.S. Census Bureau, Quarterly Workforce Indicators.
2025 Employment: NAICS Sectors for Region 9 Counties & WV Statewide

Regional Infrastructure

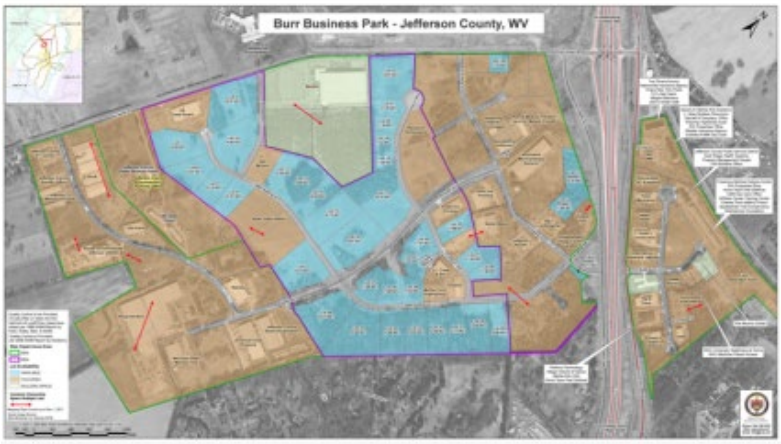
Adequate infrastructure is an essential component of economic development, as it can limit the rate and size of development. Each county is planning or already in the construction phase of projects to bring improved infrastructure to its development areas. Infrastructure projects that will increase quality of life in the region's communities are also being planned. Every county and municipality are experiencing growth which has created water and sewer infrastructure issues. In addition, the influx of business brings a need for expanded public services such as schools, hospitals, daycare centers, and public safety personnel. Region 9 is working to provide efficient infrastructure and services to businesses and residents, while continuing to develop the local economy.

Improving water, sewer, natural gas, transportation and broadband infrastructure will increase the competitiveness of the local region and will help to meet the needs of the growing population and business environment. All of these public services are necessary to support continued growth and development within the region. Over the past several years, Region 9 and HEPMPO have developed studies and plans which improve and protect the area's infrastructure and resources. These plans can be found at Region9wv.com and www.hepmpo.net.

Business and Industrial Parks

Significance

An inventory of available properties that can accommodate a variety of industries is essential to attracting new employers or retaining existing employers needing to expand.



Burr Business Park, Jefferson County, West Virginia

Current Conditions

Region 9 has fifty-five (55) business and industrial parks/sites/buildings currently available, totaling nearly 3,000 acres of available land and over 3,000,000 square feet of available building space. Properties are concentrated mainly in Martinsburg, Inwood, including Tabler Station; Charles Town, Kearneysville, and Berkeley Springs. Each county development authority promotes available properties using West Virginia Department of Commerce Property Search that not only provides a searchable database of available industrial parks/sites/buildings at city, county, and regional levels, but also includes community information, occupational data, demographic information, labor force, consumer expenditures, wages, businesses and talent.

Trends and Future Needs



Morgan County, West Virginia, Business Park

The initial opening and progressive expansion of production capacity at Proctor and Gamble's manufacturing plant in Berkeley County, as well as the openings of the Rockwool (Jefferson County) and Clorox (Berkeley County) manufacturing facilities in 2021 and 2022, respectively, coupled with the continued job growth in the Transportation and Warehousing sector indicate that the Region is becoming more competitive in the nation[4].

West Virginia Forward (WV Forward) is a collaboration among the West Virginia Department of Commerce, West Virginia University, and Marshall University to identify short-term, larger-scale projects that will boost West Virginia's economic development efforts. [5].

The lack of development-ready industrial sites has been cited by state officials as one of the top three barriers to attract businesses, create jobs and bolster investments in West Virginia. Shovel-ready sites are one of the most effective ways to lure new firms to the state, saving companies time and resources while reducing site location risk and development costs. [6] While Region 9 has been the state's strongest economic region for over a decade[7], it could certainly benefit from a state certification system for site readiness to improve its competitiveness.[8]

Strategic Findings

Given the region's proximity to large government, financial, and medical based economies, there is an opportunity to diversify the focus from "traditional" manufacturing based industrial parks to also include to logistics related industrial spaces such as high-tech industrial/offices from bioscience, medical and information technology businesses to meet future demands. There will be continued development of business parks that accommodate office, commercial, warehousing and industrial uses.

[4] Deskins, J. and Lego, B. (2023) The Eastern Panhandle Economic Outlook, 2023 – 2027. WVU Bureau of Business & Economic Research

[5] About WV Forward - West Virginia Department of Commerce. Downloaded on 2.6.23.

[6] West Virginia Forward. Creating an inventory of sites ready for development. West Virginia University. Downloaded 2.6.23.

[7] Deskins, J. and Lego, B. (2023) The Eastern Panhandle Economic Outlook, 2023 – 2027. WVU Bureau of Business & Economic Research

[8] Borges Marques dos Santos, P. (2018). Moving at the Speed of Business. West Virginia Forward (WV Forward)

TABLE 8: BUSINESS AND INDUSTRIAL PROPERTIES IN BERKELEY COUNTY, 2026

No.	Type	Name	City	Total Acres/ Sq. Ft.	Available Acres/ Sq. Ft.
1	Vacant Land	Shockey Business Center Site at I-81 Exit 16	Martinsburg	126.00 acres	126.00 acres
2	Industrial, Business Park	John D. Rockefeller IV Science & Technology Park (North)	Martinsburg	75.57 acres	75.57 acres
3	Vacant Land	BCDA Station Square	Martinsburg	20.30 acres	20.30 acres
4	Industrial, Storage/Warehouse	Carlton Drive Warehouse	Inwood	43,000 sq. ft.	43,000 sq. ft.
5	Vacant Land	Tract A Plat of Stewart Survey	Inwood	23.60 acres	23.60 acres
6	Vacant Land, Industrial/Business Park	30.22 Acre Site Tabler Station Business Park	Martinsburg	30.20 acres	30.20 acres
7	Vacant Land	1806 Hedgesville Road	Martinsburg	40.39 acres	40.39 acres
8	Vacant Land	Martinsburg Pike MAP	Martinsburg	115.00 acres	115.00 acres
9	Vacant Land	Van Metre Farm	Kearneysville	175.00 acres	107.00 acres
10	Vacant Land, Shovel Ready Sites	300-400 Mall Drive	Martinsburg	7.80 acres	7.80 acres
11	Flex, Industrial, Manufacturing, Distribution/Warehouse	Tabler Station Logistics Park (Hines)	Martinsburg	1,226,120 sq. ft.	1,226,120 sq. ft.
12	Vacant Land	Horner Farm	Martinsburg	42.00 acres	42.00 acres
13	Vacant Land	719 Near Bethels Way	Martinsburg	86.04 acres	86.04 acres
14	Distribution/Warehouse	748 Novak Drive – Warehouse Space	Martinsburg	177,866 sq. ft.	177,866 sq. ft.
15	Industrial, Vacant Land	Cumbo Yard Industrial Park	Martinsburg	59.22 acres	59.22 acres
16	Vacant Land	Novak Drive Site	Martinsburg	124.60 acres	124.60 acres
17	Vacant Land	Martinsburg Land LLC	Inwood	70.60 acres	70.60 acres
18	Vacant Land	Route 9 Properties Site	Martinsburg	168.00 acres	168.00 acres
19	Vacant Land	Harlan Springs Road	Martinsburg	115.00 acres	115.00 acres
20	Industrial, Industrial/Business Park	Falling Waters Business Center	Martinsburg	74.00 acres	14.00 acres

21	Vacant Land	Butler's Crossing: Remaining 147 Acres	Inwood	147.00 acres	147.00 acres
22	Vacant Land	Bender Fulton	Martinsburg	52.80 acres	52.80 acres
23	Vacant Land, Industrial/Business Park	Shockey Commerce Center Site	Martinsburg	84.00 acres	84.00 acres
24	Industrial, Industrial/Business Park	Liberty Business Park	Martinsburg	146.00 acres	50.00 acres
25	Vacant Land	Poland Properties Apple Harvest Drive	Martinsburg	55.00 acres	55.00 acres
26	Industrial, Manufacturing, Distribution/Warehouse	Martinsburg Logistics Center	Martinsburg	829,948 sq. ft.	829,948 sq. ft.
27	Vacant Land	Vintage Acres	Martinsburg	116.00 acres	116.00 acres
28	Office, Flex, Industrial, Distribution/Warehouse	144 Runnymead Road	Bunker Hill	35,000 sq. ft.	35,000 sq. ft.
29	Aviation	MRB South	Martinsburg	23,500 sq. ft.	23,500 sq. ft.
30	Flex, Industrial, Distribution/Warehouse	Bowman-Novak Building	Martinsburg	120,000 sq. ft.	120,000 sq. ft.
31	Industrial, Distribution/Warehouse	Mid-Atlantic I-81 Logistics Park, Phase 4 (Equus)	Martinsburg	324,000 sq. ft.	324,000 sq. ft.
32	Vacant Land	Silver Property Portfolio	Inwood	420.00 acres	400.00 acres
33	Vacant Land, Industrial/Business Park	55.02 Acre Site Tabler Station Business Park	Martinsburg	55.02 acres	55.02 acres
34	Hospitality	419 W. King Street	Martinsburg	22,664 sq. ft.	22,664 sq. ft.
35	Distribution/Warehouse	Truxmore Suite A	Inwood	30,000 sq. ft.	30,000 sq. ft.
36	Vacant Land	5660 Tabler Station Road	Inwood	24.60 acres	24.60 acres
37	Vacant Land	The Farm at Ridgeway	Ridgeway	188.00 acres	188.00 acres

Source: West Virginia Economic Development, Sites & Buildings; Berkeley County Development Authority

TABLE 9: BUSINESS AND INDUSTRIAL PROPERTIES IN JEFFERSON COUNTY, 2026

No.	Type	Name	City	Total Acres/ Sq. Ft.	Available Acres/ Sq. Ft.
1	Vacant Land	Blackford Village Site	Ranson	49.50 acres	49.50 acres
2	Industrial, Vacant Land, Industrial/Business Park	Burr Business Park	Kearneysville	5.00 acres	5.00 acres
3	Industrial, Manufacturing, Distribution/Warehouse	471 Cold Storage Road	Charles Town	20,000 sq. ft.	20,000 sq. ft.
4	Flex, Distribution/ Warehouse	464 James Burr Boulevard Building B	Kearneysville	10,000 sq. ft.	10,000 sq. ft.
5	Office	130 East Burr Boulevard (Jefferson Building)	Kearneysville	5,600 sq. ft.	5,600 sq. ft.
6	Vacant Land	Parcel B – WV Route 115	Ranson	11.14 acres	11.14 acres
7	Vacant Land, Industrial/Business Park	Tabb Lane, Harpers Ferry, WV 25425	Harpers Ferry	51.50 acres	51.50 acres
8	Office	941 James Burr Boulevard	Kearneysville	43,132 sq. ft.	15,731 sq. ft.
9	Vacant Land	282 Candlewood Drive, Charles Town, WV 25414	Charles Town	22.57 acres	22.57 acres
10	Flex, Industrial, Manufacturing, Distribution/Warehouse	Speedway Building	Kearneysville	262,500 sq. ft.	120,000 sq. ft.
11	Vacant Land	Jefferson Orchards Site	Ranson	236.70 acres	236.70 acres
12	Vacant Land	Old Standard Site	Harpers Ferry	407.00 acres	407.00 acres

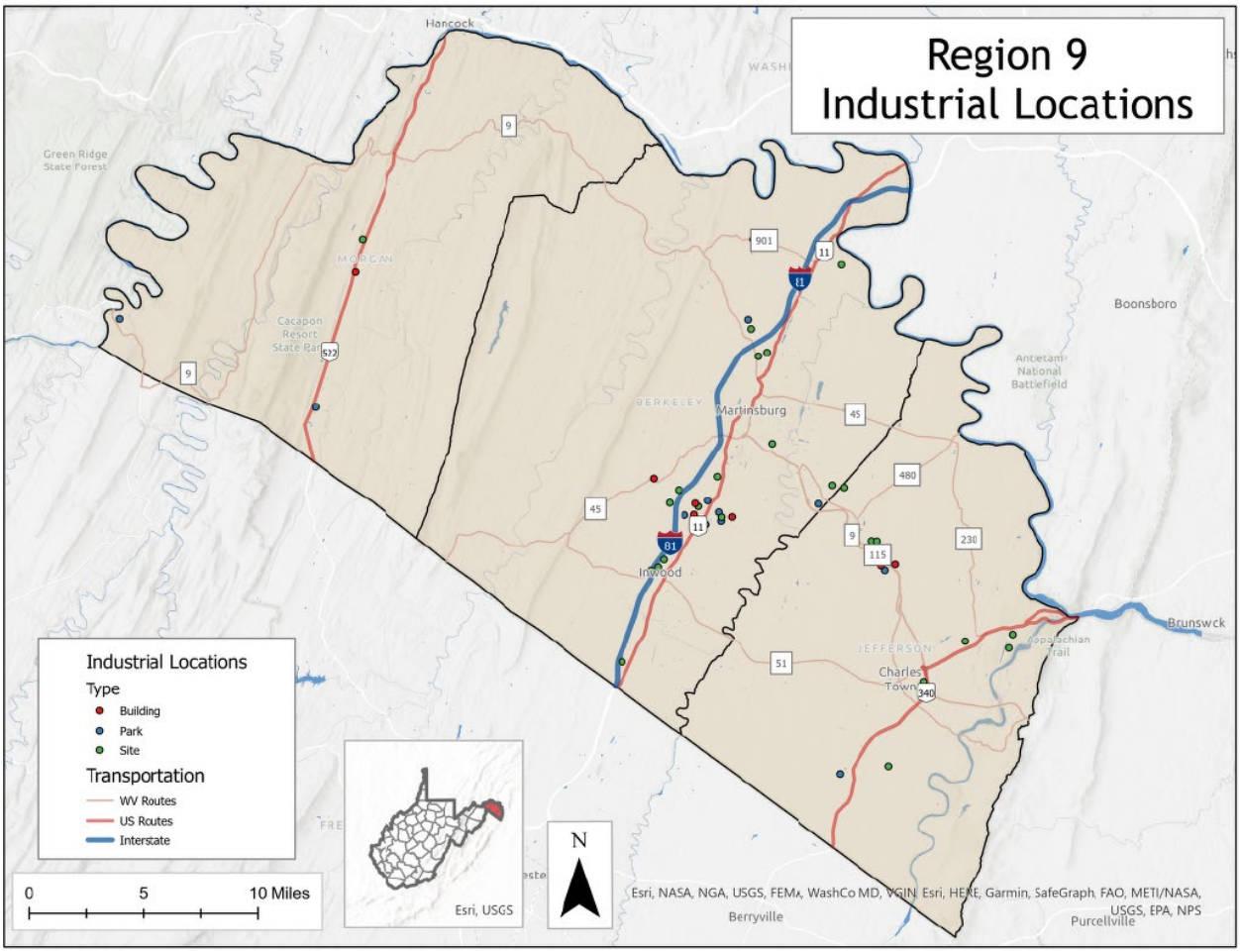
Source: West Virginia Economic Development, Sites & Buildings; Jefferson County Development Authority

TABLE 10: BUSINESS AND INDUSTRIAL PROPERTIES IN MORGAN COUNTY, 2026

No.	Type	Name	City	Total Acres/ Sq. Ft.	Available Acres/ Sq. Ft.
1	Flex, Distribution/Warehouse	Orchard Building	Paw Paw	10,000 sq. ft.	10,000 sq. ft.
2	Vacant Land, Shovel Ready Site, Industrial/Business Park	522 Business Park	Bath/Berkeley Springs	142.00 acres	57.70 acres
3	Industrial, Industrial/Business Park	Robert C. Byrd Industrial Park	Paw Paw	30.00 acres	12.25 acres
4	Vacant Land	Shirley Farms West Site	Bath/Berkeley Springs	63.70 acres	63.70 acres
5	Call Center, Office, Data Center, Medical, Hospitality	Green Street Building	Bath/Berkeley Springs	26,050 sq. ft.	26,050 sq. ft.
6	Call Center, Office, Data Center, Medical	Office Building	Bath/Berkeley Springs	8,835 sq. ft.	8,835 sq. ft.

Source: West Virginia Economic Development, Sites & Buildings; Morgan County Development Authority

FIGURE 2: 2023 BUSINESS/INDUSTRIAL SITES IN REGION 9



Source: Hagerstown Eastern Panhandle Metropolitan Planning Organization (HEPMPO)

Airports

Significance

Airports are important components to a regional economy, supporting domestic and international trade.

Current Conditions

The Eastern Panhandle is served by the Eastern West Virginia Regional Airport (EWVRA, airport code MRB), a public general aviation airport in Berkeley County, West Virginia. The airport is also home to the 167th Airlift Wing of the West Virginia National Guard. Under a joint use agreement, the 167th Airlift Wing runs its operations from the airport and leases space, including hangar facilities that house an eight-aircraft squadron. The Wing's presence makes the airport both a civilian and military asset and supports a significant number of jobs in the region.

The Federal Aviation Administration (FAA) classifies MRB as a regional reliever airport, meaning it accepts commercial flights from BWI and Dulles International Airports in cases of emergency or unexpected runway closure. The airport offers a full range of general aviation services, including a full-service fixed base operation (FBO), aircraft maintenance, hangar leasing, flight training, and other aviation education programs. While MRB does not currently have commercial passenger service, it has a 9,615-foot-long, 200-foot-wide runway with a weight capacity of almost one million pounds, the largest in the state and in the region.

Because the runway can handle the largest transport aircraft, the airport could be used to ship goods produced in the region to markets around the world in a relatively short time. Its size and weight capacity also make it well suited for large aircraft maintenance, repair, and overhaul (MRO) operations. Access to an airport of this caliber is a strong selling point when attracting business and industry to the region. Given the region's large federal presence, the airport can also bring federal officials and contractors directly to the Eastern Panhandle rather than through the Baltimore or Washington, D.C., airports. Over the long term, MRB could support future growth by adding passenger service and expanding the movement of goods to and from the region, positioning Region 9 to become a major transportation hub.

The airport has also become a growing center for aviation education and workforce training. Marshall University is expanding its aviation programs at MRB, including a professional pilot program, and Berkeley County Schools has partnered with Marshall and the airport to offer aviation programming for high school juniors and seniors. Stakeholders in the 2026 SWOT workshops also pointed to planned federal investment in a regional aviation training facility that would include aircraft maintenance and air traffic control training. They cited the airport's recent expansion as an example of how infrastructure investment can generate entrepreneurial activity, procurement opportunities, and new jobs.

Trends and Future Needs

The EWVRAA adopted its Master Plan and Airport Layout Plan (ALP) 2036 in April 2019. The Master Plan and ALP give the EWVRAA, the City of Martinsburg, and Berkeley County useful, understandable information and guidance for developing and maintaining a safe and efficient airport. The ALP also informs the FAA, the West Virginia Department of Multimodal Transportation, the EWVRAA, and other key stakeholders about planned development at MRB. The plan presents the results of data collection, activity forecasts, an analysis of development alternatives, and recommendations to guide the airport's continued development through 2036.

In the SWOT analysis for the previous CEDS, stakeholders identified the Eastern West Virginia Regional Airport as a major development opportunity and called it the most under-utilized asset in the region. In the 2026 SWOT workshops, stakeholders again pointed to the airport as a key opportunity, this time with a focus on aviation, aerospace, aircraft maintenance, air traffic control training, defense-related activity, and airport-based industry linked to Marshall University and federal facilities. They also noted that proposals for further airport investment will need to be supported by benefit-cost analysis, since the region competes with nearby airports and major investments must show a clear return.

Several airport-related projects are currently in development. These include an MRB Educational Hangar, planned with educational partners including Marshall University, BRCTC, and Shepherd University; a perimeter fence for the 167th Airlift Wing; an aviation education and play space led by the MRB Foundation; and engineering and construction of Harold Drive, for which a federal BUILD grant application has been submitted. Together, these projects would expand the airport's role in workforce training, military readiness, and business development.

Strategic Findings

The Airport Authority has identified four areas of focus to achieve its vision:

1. **Financial**
   a. Strengthen financial health
   b. Enhance fiscal management
   c. Capitalize on existing regional assets
2. **Customers and Community**
   a. Grow general aviation, aircraft maintenance, and air cargo business
   b. Improve political and legislative relationships
   c. Improve regional perception and brand
   d. Maximize regional economic impact
3. **Operations and Process**
   a. Explore emerging technologies
   b. Provide for the timely and cost-effective delivery of facility improvements and expansion
   c. Optimize FBO services and facilities
4. **Workforce**
   a. Attract and retain a highly talented and diverse workforce
   b. Enhance training and development
   c. Maintain organizational effectiveness

These priorities align closely with the goals of this CEDS, particularly Objective 1.E (business-ready sites and airport development) and Objective 2.A (workforce development aligned with employer needs). Region 9 will continue to support the Airport Authority in pursuing funding, advancing aviation workforce programs, and marketing MRB as a regional economic asset.

Ground Transportation

Significance

The Eastern Panhandle's economy runs on its transportation connections. WVU's BBER uses commuting patterns to group counties into economic regions for its county forecasting program, recognizing that changes in one county affect its neighbors. That's especially true here: tens of thousands of residents commute to jobs in Maryland, Virginia, and the Washington region, and businesses depend on the same roads and rail lines to move goods. Transportation decisions in the region shape where people live, where businesses locate, and how quickly the region can respond to growth.

Current Conditions

Berkeley and Jefferson Counties are part of HEPMPO, which leads federal transportation planning for the urbanized area. Morgan County is outside HEPMPO's planning area and relies on Region 9 and WVDOH for transportation planning support.

The region's location is one of its greatest strengths. Interstate 81 runs through Berkeley County, connecting the region to markets from New York to Tennessee, and Interstates 70 and 68 are just across the Maryland border near Hancock. Major highways connect the region to Maryland, Virginia, Pennsylvania, and Washington, D.C., and about half of the U.S. and Canadian population lives within a day's drive. Unlike much of West Virginia, most of the region is easily reached by major roads. The region is also served by CSX and Norfolk Southern rail lines, nearby intermodal facilities in Chambersburg and Greencastle, Pa., and the Front Royal, Va., inland port, along with the Eastern WV Regional Airport.

Transit is a growing part of the system. MARC commuter rail connects Martinsburg and Harpers Ferry to the Washington region, and EPTA provides bus service in Berkeley and Jefferson Counties, with a new transit center expected to open in 2027.

Growth has outpaced the road network, however. In the 2026 SWOT workshops, stakeholders described severe congestion on WV Route 9 in Berkeley County, where commercial and residential development has grown rapidly toward Interstate 81, and said Berkeley County saw roughly a decade of road investment that didn't keep up with housing growth. They also cited worsening congestion through Harpers Ferry and the region's mountain corridors.

Trends and Future Needs

Federal funding uncertainty. The Infrastructure Investment and Jobs Act (IIJA) brought significant federal funding to West Virginia for bridges, paving, safety, transit, and trails, but its

programs were set to expire September 30, 2026. Congress has extended the IIJA authorizations until December 11, 2026, while it continues negotiating new surface transportation reauthorization legislation. In May 2026, the House Committee on Transportation and Infrastructure approved the BUILD America 250 Act (H.R. 8870) by a bipartisan vote of 62-2, advancing a five-year, $580 billion surface transportation reauthorization package. Until a new law passes, funding levels for highways, transit, and local programs remain uncertain, and Region 9 and HEPMPO will need to track the outcome closely.

State investment and project selection. In 2024, the state allocated $150 million in supplemental highway funding, with 46 roads in WVDOH District 5, which includes Berkeley, Jefferson, and Morgan Counties, benefiting. Stakeholders noted that the state's next Statewide Transportation Improvement Program (STIP) will use a more transparent benefit-cost scoring process that lets cities and counties submit projects for evaluation, giving local governments a clearer path to advance their priorities. Recent and planned regional projects include the US 340 widening in Jefferson County and improvements to WV Route 9 between Berkeley and Morgan Counties.

Transit funding. As the urbanized area grows, it is approaching the 200,000-person threshold at which federal transit operating support changes. Stakeholders warned that this could shift more of EPTA's operating costs to local governments, putting existing services such as free fares and Saturday service at risk. MARC service and ridership are also tied to federal employment, and stakeholders saw demand drop during federal shutdowns.

Local roads and bridges. Municipalities maintain their own streets from general revenue, without dedicated state funding, and stakeholders said many cannot keep up even when they spend their entire street budgets. Federal bridge funding remains an important opportunity for local bridges.

Freight and corridor changes. Freight volume on Interstate 81 is expected to keep growing, and Virginia and Maryland have both studied widening their portions of the corridor. In Morgan County, the US 522 Berkeley Springs bypass will remove heavy truck traffic from downtown but may also reduce visitor traffic, and the community will need to plan for that change before the bypass opens.

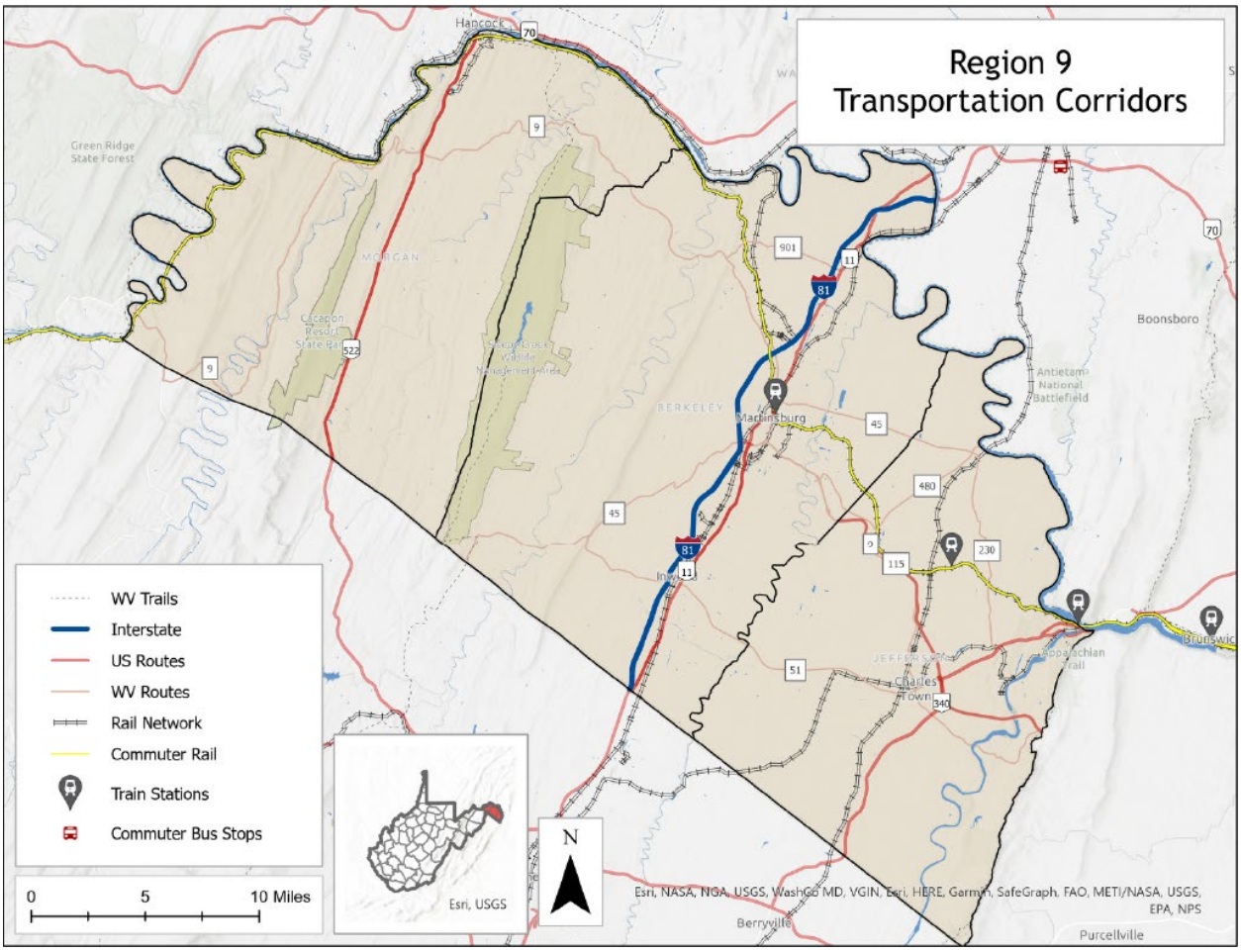
Long-range planning. HEPMPO's 2050 Long Range Transportation Plan, adopted in 2022, identifies how the region intends to invest in its transportation system. That plan and related studies are available at https://hepmpo.com. HEPMPO's next plan update will be an important opportunity to reflect the growth trends documented in this CEDS.

Strategic Direction

HEPMPO will remain the lead organization for most transportation projects in Berkeley and Jefferson Counties. Region 9 will support HEPMPO's planning process, help local governments advance projects through the state's STIP evaluation, support transportation planning and

funding in Morgan County, and work with EPTA and state partners to sustain transit service as funding rules change.

FIGURE 3: TRANSPORTATION CORRIDORS IN REGION 9



Source: Hagerstown Eastern Panhandle Metropolitan Planning Organization (HEPMPO)

Drinking Water, Wastewater, and Stormwater



Significance

Water is the resource the Eastern Panhandle's growth depends on most. Reliable, clean water and adequate wastewater capacity determine where housing can be built, which employers can locate here, and whether the region's spring- and river-based tourism economy can thrive. In the 2026 SWOT workshops, stakeholders identified water supply as the most pressing infrastructure constraint in the region.

Current Conditions

The Eastern Panhandle is served by the following water and sewer utilities:

- Berkeley County Public Service Water District
- Berkeley County Public Service Sewer District
- City of Martinsburg Water and Sewer Department
- Harpers Ferry Water Works
- Charles Town Utility Board
- West Virginia American Water
- Berkeley Springs Water Works
- Paw Paw Municipal Water Works
- Warm Springs Public Service District
- Paw Paw Sewer System
- Private wells and private septic systems

Utilities are investing heavily to keep up with growth. The Berkeley County Public Service Water District's Potomac River and Bunker Hill treatment plant projects alone total more than $115 million. Other active projects include water main extensions in Berkeley County, sewer plant and line improvements in Paw Paw, water plant upgrades in Bath, inflow and infiltration repairs for the Warm Springs Public Service District, and water and sewer extensions along US 522 in Morgan County.

Much of the region's infrastructure is old. Martinsburg's water system dates to 1872, and many local water and sewer assets were built before or during the World War II era. Stakeholders noted that capital grants can fund new facilities, but communities often lack dedicated funding for long-term operations, maintenance, and replacement.

The City of Martinsburg and the Berkeley County Public Service Sewer District are the region's Municipal Separate Storm Sewer System (MS4) permit holders, and each is responsible for developing and implementing a stormwater management program. The Berkeley County Public

Service Stormwater District launched in 2019, and the City of Martinsburg launched its stormwater program in 2023.

Trends and Future Needs

Water supply. Demand is rising from population growth, new manufacturing, tourism, and proposed data centers, all drawing on surface and groundwater sources that are finite. The region's karst limestone geology makes groundwater especially vulnerable, since contaminants can move quickly through dissolved channels in the bedrock. Stakeholders cited a major event in the region that drew about 50,000 spectators, during which two wells ran dry and water had to be trucked in, as an example of how close some systems are to their limits.

Source water protection. West Virginia requires all public water suppliers to develop and implement Source Water Protection Plans, and utilities may need additional resources to carry out the strategies in those plans. A recurring strategy across the region is extending sewer service to areas with failing septic systems, since effluent can reach groundwater through the karst bedrock.

Wastewater capacity. As incoming flows rise with growth, sewer utilities must continue to meet their wasteload allocations (WLAs) under the Chesapeake Bay cleanup. Utilities will need to stay current on financing and funding opportunities to expand capacity while keeping rates reasonable.

Extending service to growth areas. Water and sewer access is one of the main factors limiting business-ready sites and housing. Stakeholders cited Project Allstar, where extending water and sewer across Interstate 81 remains a key constraint, and noted the region has lost investment in the past when needed infrastructure was not in place.

Stormwater. Under the 2020 Census and EPA's 2023 clarification of its stormwater rules, small MS4 permit requirements apply to communities within census urban areas of 50,000 or more people. As Charles Town and Ranson continue to grow, they should monitor whether they fall within a qualifying urban area after the next census and prepare for possible MS4 permit designation. Both communities have taken early steps by applying for funding to map their stormwater infrastructure. Stormwater infrastructure asset mapping is also underway or proposed in Martinsburg and other communities.

Strategic Findings

Protecting and expanding the region's water resources benefits existing residents and businesses and assures new employers that their water needs will be met reliably. Region 9 will continue to help utilities plan capital investments, pursue funding, and account for long-term operations and maintenance costs.

The Eastern Panhandle lies within the Chesapeake Bay watershed. Other watershed states have used nutrient credit trading programs that Region 9's utilities could look to as models for meeting their wasteload allocations.

Charles Town and Ranson can work with Region 9's environmental program staff to understand MS4 permit responsibilities and prepare in the years before a possible designation.

Communication Network

Significance

Fast, reliable broadband and mobile service are basic infrastructure for the Eastern Panhandle's economy. Businesses need them to operate and compete, residents need them for remote work, telehealth, and education, and site selectors treat them as a minimum requirement. Public safety agencies also depend on reliable communications to respond to emergencies across a growing region.

Current Conditions

Broadband coverage in the region has expanded substantially in recent years. In the 2026 SWOT workshops, stakeholders noted that fiber deployment had grown significantly over the previous year and a half, driven partly by federal infrastructure funding. Gaps remain, however, especially in fiber and cellular coverage in rural parts of the region, and stakeholders noted that neighboring Maryland and Virginia offer stronger connectivity.

Statewide, the federal government approved about $545 million for West Virginia's plan to expand broadband access in November 2025 under the Broadband Equity, Access, and Deployment (BEAD) program, clearing the way for the state to begin connecting more than 73,000 additional locations to reliable high-speed internet. WVDED's Office of Broadband administers the program; details are available at https://broadband.wv.gov. Each county's broadband development plan is available on Region 9's website at Broadband Plans (region9wv.com). westvirginiawatchwv

Trends and Future Needs

Demand for bandwidth will keep growing as more residents work remotely, more services move online, and the region attracts technology and data-driven employers. Fiber provides the capacity and reliability that data centers, federal contractors, and other technology users need, while cellular coverage remains critical for public safety, travel corridors, and tourism areas. As BEAD-funded projects are built, local governments will need to track which locations are still unserved, help residents learn about affordable service options, and protect their own systems against growing cybersecurity threats.

Strategic Findings / Policy Implications

The region already has a strong base of information sector jobs and skills. According to the Census Bureau's Quarterly Workforce Indicators, information sector employment is about 63% more concentrated in Region 9 than statewide. With continued investment to close remaining fiber and cellular gaps, the Eastern Panhandle can compete with neighboring states for technology companies, federal contractors, and remote workers.

Electric and Energy

Significance

Energy, particularly electricity and natural gas, is a basic and critical component of infrastructure that fuels economic development. Increased availability, diversity of energy sources, and reliability of energy provisions are key to increased economic productivity.

Current Conditions

In the Eastern Panhandle current electrical service is provided by the First Energy Corporation electric companies *First Energy Corp.,* Mon Power and Potomac Edison.

Current gas service is provided by Mountaineer Gas Company, Blueflame, Inc., and Thompson Gas.

The Eastern Panhandle Expansion Project brought a new natural gas supply into Region 9 through two connected pipelines. A 23-mile Mountaineer Gas line was built across northeastern Morgan County in 2018, and it connects to existing natural gas lines in Berkeley County. To supply that line, Columbia Gas Transmission, a subsidiary of TransCanada (now TC Energy), applied to the Federal Energy Regulatory Commission (FERC) in 2017 to build a new 8-inch pipeline running 3.4 miles from an existing facility in Fulton County, Pa., through Washington County, Md., and under the Potomac River and the C&O Canal into Morgan County. FERC approved the project in July 2018 after environmental and historical reviews and several public hearings, but it stalled when the State of Maryland denied the final right-of-way needed for the pipeline. Columbia then sued in federal district court in Maryland to use federal eminent domain power, and the federal appeals court upheld the district court's decision in October 2023. Construction began in late 2024, and the pipeline began service on June 26, 2025. According to the company, the pipeline will provide more than 47 million cubic feet per day of natural gas to homes and businesses in Morgan County. Mountaineer Gas has said that once its interconnection facility is built, it will look at running natural gas supplies into Berkeley Springs for local customers. Along with electric and gas, there are several private renewable energy consultants and installation experts in the region.

Citation: FERC docket (CP17-80), Morgan Messenger's June 2025 article on FERC's in-service approval, and Pipeline & Gas Journal's July 2025 report.

Trends and Future Needs

The Eastern Panhandle Expansion Project pipeline under the Potomac River began service on June 26, 2025, bringing a new natural gas supply into Morgan County. As Mountaineer Gas works toward serving more local customers, including possible service to Berkeley Springs, businesses and institutions will need information on how to connect, what it costs, and how to convert existing heating and process systems to natural gas. Local fire and emergency services

will also need training and equipment to respond to natural gas incidents in areas that haven't had gas service before.

Electric power has become a more pressing concern. In the 2026 SWOT workshops, stakeholders identified electric capacity as a major constraint on growth. About 40 potential data center sites have been identified in the region, but none of the three projects underway could yet get a power commitment because the needed capacity isn't available. New substations can take three to five years to build, large transformers are about three years out from order, and new transmission lines can cost more than $100 million and face local opposition. Stakeholders also raised concerns that large data center demand could raise electricity rates for residents and businesses, and flagged the proposed Valley Link high-voltage transmission line as a significant regional issue.

Energy efficiency remains one of the most cost-effective tools available. Efficiency programs reduce demand on a strained grid, lower energy costs for residents, businesses, and local governments, and improve resilience during outages and price spikes.

Strategic Findings

The Eastern Panhandle's growth depends on a reliable, affordable, and diverse energy supply. Region 9 will support coordinated planning among utilities, developers, and local governments so that electric and gas capacity is in place before major development arrives, help communities evaluate the impacts of large energy users such as data centers, and promote energy efficiency and supply diversity to strengthen the region's resilience.

Solid Waste

Significance

The management of waste streams are critical to quality of life and economic development, as open dumps and roadside litter can present a strain on natural resources. Landfill capacity could limit disposal options for industry operations.

Current Conditions

Curbside pickup is provided by municipal corporations or other private businesses outside corporate boundaries. Currently, there are three landfills that receive municipal solid waste (MSW). The LCS Services landfill in Berkeley County, north of Hedgesville is one disposal point for Berkeley County generated MSW. Private haulers also transport MSW to landfills in nearby Pennsylvania.



Berkeley County, WV Solid Waste Authority

While some Municipalities and private haulers provide curbside recycling, there are several recycling transfer centers located throughout the region:

three in Berkeley County 1.) South Berkeley Pilgrim Street 2.) Martinsburg Grapevine Road, 3.) Hedgesville Eagle Plaza; one in Jefferson County - Jefferson Orchard Rd Kearneysville; and one in Morgan County - The Charles R. Biggs Recycling Center located approximately three miles south of Bath on US 522.

The Rehabilitation Environmental Action Plan (REAP) operates a statewide litter collection program involving the public called Adopt-A-Highway. The program allows groups to voluntarily agree to collect litter in 2–3-mile increments of any road within the county twice per year.

Trends and Future Needs

Each county's Solid Waste Authority periodically prepares a Comprehensive Litter and Solid Waste Control Plan. These plans document trends and needs in each county and across the region, and they guide local decisions about collection, recycling, litter control, and disposal.

The region's growth is making it harder to site new landfills or expand existing ones. Development pressure, rising land values, and the region's karst geology all limit where disposal facilities can go, and Class A landfills are prohibited county-wide in Berkeley County. As the population grows, so does the volume of waste, increasing the region's reliance on facilities outside its borders and raising disposal costs for residents and businesses.

The former Entsorga facility in Martinsburg shows both the potential and the risks of alternatives to landfilling. The plant opened in 2019 and was designed to process 110,000 tons per year of mixed waste into solid recovered fuel (after recovering certain recyclables) for use in facilities such as cement kilns. Prior to its closure, the waste-to-fuel plant sold its product to Argos, a local cement plant in Martinsburg. After the facility closed in 2022, the authority was forced to redirect its material to a neighboring county's landfill that is more expensive. Since then, trash inside the facility's giant bins has caught fire and the building has sat largely idle as Solid Waste Authority leaders sought to find an operator that could get it going again. The Berkeley County Solid Waste Authority, which owns the site, took full control of the facility in 2023 and has since cleaned up most of the waste left behind.

A restart now appears possible. In September 2026, the Berkeley County Solid Waste Authority held a public hearing on an application from BurCell, a Georgia-based company that aims to "develop the old Entsorga facility into a new state-of-the-art Mixed Waste Processing Facility." Reopening the site would reduce the amount of trash going to landfills, which emit significant greenhouse gases and can pollute waterways, lower disposal costs for Berkeley County, and restore a local supply of recovered fuel for industry. Lessons from Entsorga's closure, including the importance of a financially stable operator and a plan for site cleanup if operations stop, should inform any new agreement.

Strategic Findings

Region 9 will assist, when feasible, with implementing strategies in the county solid waste plans:

- Berkeley County Solid Waste Authority Comprehensive Litter and Solid Waste Control Plan
- Jefferson County Solid Waste Authority Comprehensive Litter and Solid Waste Plan
- Morgan County Solid Waste Authority Comprehensive Litter and Solid Waste Plan

Region 9 will also support efforts to reopen the former Entsorga site as a mixed waste processing and resource recovery facility, and will help the county authorities identify funding for recycling, waste reduction, and litter control programs that keep pace with the region's growth.



Eastern Panhandle Planning and Regional Development Council (Region 9)

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