

Monarch Compute Campus Phase 1 in Mason County, WV

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The Monarch Compute Campus is a proposed 1.35 GW data center powered by a 2GW natural gas power plant that will provide local economic benefits during construction and subsequent operation of the data center campus.

	Jobs <i>Onsite jobs plus jobs created at suppliers and county businesses</i>	Income <i>Wages, salaries, and benefits paid to workers</i>	GDP <i>Project's net addition to the County's economy (inclusive of income)</i>	Taxes <i>Revenue generated for local governments in Mason County¹</i>
Construction period	6,250 Temporary jobs each year during construction (4,375 onsite)	\$1.5B Cumulative income for onsite, supplier, and induced workers	\$3.9B Cumulative county GDP from direct, indirect, and induced activity	\$105M Annual property tax revenue for county taxing jurisdictions generated through data center campus operations ²
Annual operations	2,090 Permanent jobs (645 onsite + 1,445 in other sectors)	\$181M Annual labor income for onsite, supplier, and induced workers	\$395M Annual GDP contributions - 36% of Mason County's current GDP	



Phase 1 development of the Monarch Compute Campus is expected to support 6,250 jobs annually during construction. This includes 4,375 onsite construction jobs and 1,875 additional jobs supported through local suppliers and household spending across Mason County. Construction activity is projected to generate \$1.5 billion in cumulative labor income, including \$1.3 billion in wages and benefits for construction workers (averaging approximately \$150,000 per worker annually) and \$207 million for supplier- and consumption-supported jobs (averaging approximately \$55,100 per worker annually). Contributions to the local economy are expected to total \$3.9 billion during the construction period.



Once operational, the Monarch Compute Campus is expected to support 2,090 jobs in Mason County. This includes 645 permanent positions at the campus, plus an estimated 1,445 additional jobs supported through supply chain activity and employee spending in the local economy. The Campus is expected to contribute \$395 million annually to Mason County's economy, equivalent to approximately 36% of the county's current GDP. Annual property taxes generated for Mason County taxing jurisdictions are estimated to total \$105 million, including \$87 million for the school district, \$13 million for Mason County government, and \$5 million towards Mason County emergency services and public safety funding.

Source: EY analysis using development expenditures and planned operations provided by Nscale. Analysis uses the 2024 IMPLAN economic model for Mason County, WV. Dollar amounts displayed are in 2026 dollars for both construction and operations. All figures are projections based on economic and fiscal assumptions that may be subject to change.

Notes: Impacts include direct (data center + power generation), indirect (supplier activity), and induced (consumer-related) activity.
 1. Tax estimates reflect direct property tax revenue associated with the Monarch Compute Campus and do not include other potential state and local taxes generated by the project's direct, indirect, and induced activity.
 2. Annual property tax estimates incorporate a reduction in value due to the High-Technology Business Property Valuation Act that allows for tangible personal property (TPP) directly used in the high-tech business to be valued at 5% of original cost. Tax revenues attributable to excess county and school levies were allocated directly to the applicable local taxing jurisdictions. Current levies were allocated according to the formula for High Impact Data Centers with 30% allocated to Mason County jurisdictions and the remaining 70% allocated to various state funds.

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