

The Northwest grid could grow 50–100% in 20 years. Your capital plan is where that lands.

Data centers, electrification, and a legislated 100%-clean deadline are stacking new load and new obligations onto a grid built on federal hydropower. Each of those forces reshuffles the projects on your list. Invizion helps electric utilities re-sequence a capital portfolio in a click — and defend every decision.

50–100%¹ Projected growth of the Northwest power system over the next 20 years, with data centers a leading near-term driver.	9,000 MW¹ New renewables the region must add 2027–2032 — alongside 5,000 MW of storage.	~\$5B² Bonneville Power Administration's transmission-expansion program across 20+ projects.	100% clean • 2045³ CETA deadline — coal-free by 2025, greenhouse-gas-neutral by 2030.
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THE WASHINGTON LANDSCAPE

Four forces are moving your project list at once

None of these is theoretical, and none of them waits for your next budget cycle. Together they mean the capital plan you approved last year may already be the wrong plan.

DEMAND — LOAD GROWTH

Decades of flat load, then a step change

The Northwest Power and Conservation Council's draft Ninth Power Plan projects regional energy demand rising from about 22,000 average MW today to 31,000–44,000 aMW by 2046 — a system that grows 50–100% in 20 years, with data centers named the major near-term driver.¹

Central Washington's low-cost hydropower — Chelan County residential rates near 3 cents per kWh — has made the region a magnet for data centers, and every large new customer is a capacity commitment competing for the same capital.¹³

RELIABILITY — HYDRO & PEAKS

A hydro-built grid meeting a rising peak

Hydroelectricity is Washington's primary generation source, and the state's low 10.13 cents/kWh average retail price reflects it.⁴ But that backbone is federal: Bonneville markets power from 31 dams, supplies about 28% of the region's electricity, and controls roughly 75% of its high-voltage transmission.⁵

Utilities like Snohomish County PUD still draw about 77% of their power from Bonneville — so drought years and a climbing winter peak (35,500 MW regionally, headed toward 47,000–60,000 MW by 2046) land directly on resource-adequacy margins.⁶¹

GENERATION — THE TRANSITION

Coal out, clean in — on a legislated clock

The Clean Energy Transformation Act requires utilities to eliminate coal by 2025, be greenhouse-gas-neutral by 2030, and reach 100% clean electricity by 2045.³ That reshapes every IRP: Puget Sound Energy's 2023 mix was still 30% hydro, 30% gas, 22% wind, and 18% coal.⁸

The Northwest's only nuclear plant, the 1,207 MW Columbia Generating Station, is now a rare firm carbon-free anchor — and the region needs 9,000 MW of new renewables and 5,000 MW of storage by 2032 to fill the gap.⁷¹

CAPITAL — TRANSMISSION & GRID

Build transmission and modernize at once

Bonneville is advancing roughly \$5 billion of transmission expansion across more than 20 projects, and raised annual grid-reinforcement spending to \$590 million in FY2025 from \$377 million a year earlier.²

For the investor-owned utilities, recovery is the pressure point: PSE's pending rate plan seeks a 15.2% electric increase in 2027, and Avista is asking for \$111 million (13.9%) starting January 2027.⁹ ¹⁰ New obligations stack on the backlog — something on the list has to move.

WHO RUNS WASHINGTON'S GRID

A few investor-owned utilities, a very large public-power sector, and a federal backbone

Washington is a public-power state. Three UTC-regulated investor-owned utilities sit alongside big municipal utilities and PUDs — all resting on Bonneville's federal hydro and transmission system. The pressures are shared; the accountability path differs.

Investor-owned utilities

Rates & capital recovery regulated by the WA UTC

Puget Sound Energy (PSE) ~1.24M electric customers · 8 counties⁸

Avista 422,000 electric customers · HQ Spokane¹¹

Pacific Power SE / central WA · a division of PacifiCorp
(Berkshire Hathaway Energy)

PSE's pending multiyear rate plan seeks a 15.2% electric increase in 2027 — approvals are not a formality.⁹

Public power & the federal backbone

Governed by boards, councils & federal statute, not UTC rates

Seattle City Light 493,663 customers · carbon-neutral since 2005¹²

Snohomish County PUD 373,000 customers · ~77% of power from BPA⁶

Tacoma Power Municipal · division of Tacoma Public Utilities, hydro-based

Chelan & Grant County PUDs Columbia River dams · Chelan >2,000 MW hydro¹³¹⁴

Bonneville Power Administration Federal · 31 dams, ~28% of NW powers

Bonneville's ~\$5 billion transmission-expansion program underpins nearly every utility in the state.²

Every capital dollar has to be defensible

Whether you answer to the UTC, an elected PUD board, or a federal rate process, the question is the same: why this project, why now, why at this cost?

Washington UTC regulates rates, capital recovery, and clean-energy plans for the investor-owned utilities — PSE, Avista, and Pacific Power.¹⁵

PSE's pending rate plan (filed February 2026) requests electric increases of 15.2% in 2027, 3.7% in 2028, and 8.7% in 2029, with a UTC decision expected in early 2027.⁹

Avista's 2026 case seeks \$111 million (13.9%) in electric revenue effective January 2027 at a requested 10.2–10.5% ROE, phased through 2030.¹⁰

Cap-and-invest — Washington's carbon market launched in February 2023, and voters rejected repeal Initiative 2117 in 2024 (about 62% opposed), locking the program in as a lasting cost-and-funding factor for utilities.¹⁶¹⁷

Public power sets its own rates — Seattle City Light, Tacoma Power, and the PUDs answer to councils and elected boards, making capital decisions in front of their customer-owners.¹²

The money is moving — can your plan absorb it?

Washington utilities have more grid and clean-energy capital in play than they've had in a generation. The constraint is readiness: which projects qualify, which are shovel-ready, and how the timing lines up.

Bonneville transmission: ~\$5B across 20+ expansion projects, plus \$590M of grid reinforcement in FY2025 (up from \$377M in FY2024).²

DOE GRIP: \$6B+ nationally across Rounds 1 and 2 of the Grid Resilience and Innovation Partnerships program — the federal pool Washington utilities compete into for resilience and transmission.¹⁸

~\$2.3B annual regional need by 2032 — the estimated fixed cost of the draft Ninth Plan portfolio (9,000 MW renewables, 5,000 MW storage, 2,100 MW gas).¹

Cap-and-invest proceeds from Washington's allowance auctions are reinvested in clean transportation, resilience, and clean-energy projects utilities can align capital against.¹⁶

IRA elective (direct) pay lets public power and PUDs — Seattle City Light, Tacoma Power, Chelan and Grant — monetize clean-energy tax credits they historically could not use.

WASHINGTON'S GRID, IN BRIEF

Questions Washington utility leaders are asking

Short, sourced answers — the same facts we dig into with utilities looking at their capital programs.

How fast is Washington's (and the Northwest's) electricity demand growing?

The draft Ninth Power Plan projects the regional power system growing 50–100% over 20 years — from about 22,000 average MW today to 31,000–44,000 aMW by 2046 — with data centers the leading near-term driver

What does the Clean Energy Transformation Act require?

CETA requires Washington utilities to eliminate coal-fired electricity by 2025, be greenhouse-gas-neutral by 2030, and deliver 100% clean, carbon-free electricity by 2045.³

How dependent is Washington on hydropower?

Hydroelectricity is the state's primary generation source and keeps its average retail price low at 10.13 cents/kWh; Bonneville alone markets power from 31 federal dams and supplies about 28% of the region's electricity, so drought and a rising peak directly stress resource adequacy.⁴⁵

Who regulates my utility's rates?

The Washington UTC regulates rates and clean-energy plans for the investor-owned utilities — PSE, Avista, and Pacific Power. Seattle City Light, Tacoma Power, and the PUDs are public power and set their own rates through councils and elected boards.⁵¹²

What grid funding is available in Washington?

Bonneville is advancing roughly \$5 billion of transmission expansion, DOE's GRIP program has put more than \$6 billion nationally in play, and the state's cap-and-invest auction proceeds are reinvested in clean-energy and resilience projects.²¹⁸¹⁶

How does Invizion help Washington electric utilities plan capital?

Invizion is scenario-based capital portfolio optimization for utilities. It lets you model how a data-center load surge, a drought year, a grant award, or a CETA milestone reshuffles your whole project list, re-sequence the portfolio automatically, and keep a defensible record of every decision for the UTC or your board.

REFERENCES

Sources

Every figure in this briefing is tied to a primary or authoritative source.

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ABOUT INVIZION

Capital program optimization for utilities

Invizion is a purpose-built capital lifecycle management platform for utilities. It integrates budgeting, CIP, scenario analysis, and funding-source tracking in one system — so utilities can re-sequence a capital portfolio in a click and demonstrate audit-ready, defensible decisions to regulators, boards, and rating agencies.

See how utilities keep capital plans current and defensible with Invizion.

Explore Invizion →