From a utility planning perspective, the energy transition has a simple problem:
Reliability matters.

Load growth from data centers, electrification, and AI isn't theoretical — it's showing up in our forecasts now. At the same time, gas retirements and transmission constraints are shrinking the margin for error.

Wind and solar are essential. Batteries help. But neither replaces **firm, local, always-on capacity**.

That's why geothermal — especially closed-loop geothermal — is back in planning conversations.

From a planner's seat, geothermal checks boxes that few other resources can:

- 90%+ capacity factor
- Predictable output
- Small footprint near load
- No fuel price volatility
- Long asset life aligned with system planning horizons

Traditional geothermal carries reservoir risk. Closed-loop systems change that equation by turning subsurface uncertainty into surface-level engineering — something utilities know how to underwrite.

Importantly, utilities don't need to own wells to benefit.

The model that works best is familiar: Developers and subsurface experts manage the wells, utilities procure **firm capacity** through long-term contracts, and reliability shows up where it matters — in the resource adequacy stack.

Geothermal isn't replacing hydrogen, gas, or storage. It's filling the reliability gap while the rest of the system catches up.

Quietly, pragmatically, that's why utilities are paying attention.