US Data Center Daily Briefing

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KEY THEMES

- PSC Wisconsin raised We Energies' VLC parent-credit bar to A-/A3 in Docket 6630-TE-113
- Oracle says full cash collateral at the nearly 1 GW Lighthouse campus could top $100M/year
- Dominion's 70,000 MW data-center load heads to a July 14 Virginia SCC hearing in PUR-2026-00056
- PUCT approved ERCOT's Batch Zero process for 75 MW+ loads, with Batch 1 opening Summer 2027

Why PSC Wisconsin's A-/A3 credit bar puts Oracle's Lighthouse collateral in play

PSC Wisconsin tightened the credit rules behind one of the country's largest data center loads. On May 21, 2026 the Commission issued its final decision in Docket 6630-TE-113 on We Energies' Very Large Customer tariff. It raised the parent-credit bar to A-/A3 before a customer can skip cash collateral, and it stripped the utility's power to waive financial assurances on its own. On June 10, 2026 Wisconsin Electric, Vantage Data Centers, and Cloverleaf Infrastructure filed jointly to reopen those provisions. Oracle, the phase-1 customer at the nearly 1 GW Lighthouse campus in Port Washington, says full cash posting could cost it more than $100 million a year.

- PUR-2026-00056: Dominion data-center load heads to a July 14 SCC hearing – The Piedmont Environmental Council is pressing the Virginia State Corporation Commission to adopt a "but for" cost-allocation standard so hyperscale infrastructure costs follow the load that causes them; Dominion's data-center power requests now total 70,000 MW.
- ERCOT's Batch Zero clears the PUCT; the batch framework recurs from Batch 1 in 2027 – The PUCT approved ERCOT's process to study and connect loads of 75 MW or greater on June 18, 2026; Batch Zero submissions are due July 10, 2026, and Batch 1 applications open in Summer 2027.
- Wisconsin DNR issued air permits for 45 diesel generators at Lighthouse – On June 12, 2026 DNR issued permits 25-MIN-094 and 24618528A-F01 for 45 emergency generators at the 672-acre Vantage campus in Port Washington.

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