Who controls the technology behind a UK energy supplier?

How much this sector depends on technology suppliers it cannot fully control — and where that matters most.

June 2026

The big picture

3.4 / 5

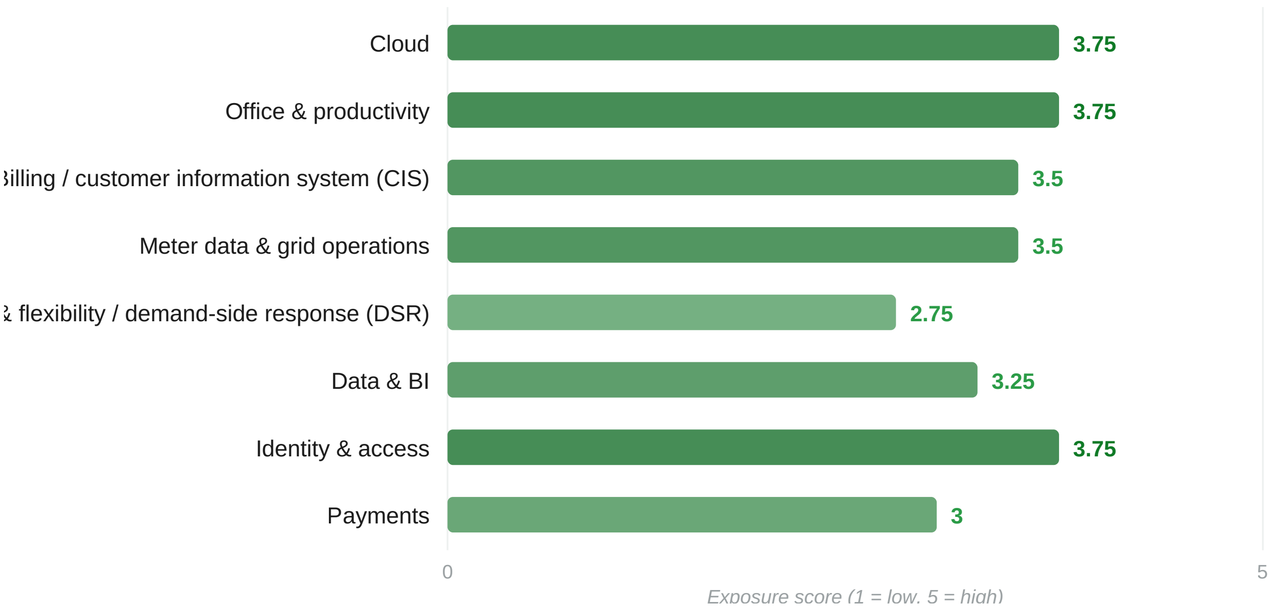
MEDIUM EXPOSURE (top of band, leaning High)

For a typical UK energy supplier, six of the eight technology building blocks are High or upper-Medium exposure, with a overall headline score of 3.4. This is the first sector we have profiled where the defining system has a genuine British leader: the customer information system (CIS) that bills households has a UK-controlled market leader, Kraken Technologies (spun out of Octopus Energy), and the trading and flexibility / demand-side response (DSR) layer is unusually British too. But the same billing layer also includes Gentrack (New Zealand), Hansen (Australia), SAP (Germany) and Itron (United States), and beneath almost everything sits a US hyperscaler - Kraken and Gentrack both run on Amazon, the leading meter-data system (Itron) runs on Microsoft - so British control of the software does not clear US legal reach at the substrate.

We looked at the everyday layers of technology a UK energy supplier or utility relies on, from the cloud it runs on to the systems that define the sector. A supplier owned in the United States can be compelled to hand over data under US law — the CLOUD Act[1], and the surveillance powers in Section 702 of the Foreign Intelligence Surveillance Act[2] — even when that data is stored in Britain; a British supplier answers only to UK law. We scored each building block on four things — how few the suppliers are, whose laws they answer to, how hard they are to switch, and how essential they are.

Where the exposure sits

Exposure level: lower higher



High : above 3.5 **Medium : 2.1–3.5**

Who controls each layer

The building blocks this sector relies on, coloured by who ultimately controls each one: US-controlled Mixed / other UK-controlled

Cloud
Microsoft Azure / Amazon Web Services
US

Office & productivity
Microsoft 365
US

Billing / customer information system (CIS)
Kraken / ENSEK / Gentrack / Hansen / SAP for Utilities
Mixed

Meter data & grid operations
Itron MDM / Correla / ElectraLink
Mixed

Trading & flexibility / demand-side response (DSR)
Flexitricity / Kaluza / Kraken Flex / Limejump
UK

Data & BI
Microsoft Power BI / Stark / EnAppSys
Mixed

Identity & access

Microsoft Entra / Okta US

Payments UK
UK banking rails and acquirers

This is the first profile where the defining layer (the billing customer information system) has a genuine UK-controlled market leader (Kraken Technologies), and the trading/flexibility (DSR) layer plus the central market-data infrastructure (Correla, ElectraLink) are UK-controlled too. But cloud, productivity, identity and reporting remain US-dominated, the billing layer also includes NZ/AU/DE/US vendors, and the substrate beneath the British software is still a US hyperscaler (Kraken and Gentrack on AWS; Itron meter data on Azure).

What this means, in plain terms

For once, the defining system has a British leader. Unlike a law firm (whose document store has no British leader) or a manufacturer (whose design software has no UK option at scale), an energy supplier has a real UK-controlled choice for its most important system. The customer information system (CIS) that bills households has a UK-controlled market leader, Kraken Technologies, built inside Octopus Energy and now being spun off as a standalone company, plus ENSEK (Nottingham, now owned by British Gas's parent Centrica). This is the clearest bright spot we have found - the method registering genuine UK sovereignty where it exists[3].

But the billing layer is mixed, not clean. The same billing layer that contains Kraken and ENSEK also contains Gentrack (New Zealand), Hansen (Australia), SAP (Germany) and Itron (United States). So whether a given supplier is well-placed depends heavily on which billing system it chose: a supplier on Kraken is UK-controlled at the software level, while one on Gentrack or SAP is not. And the customer information system is the deepest thing to replace on the whole profile - migrating it is a multi-year programme[3].

The cloud underneath undercuts the British software. Kraken and Gentrack - the two leading billing platforms - both run on Amazon's cloud, and the leading meter-data system, Itron, runs on Microsoft's. So even Britain's billing leader keeps its customer data on an American platform, reachable under the US CLOUD Act[1] (the Clarifying Lawful Overseas Use of Data Act 2018, which lets US authorities compel a US company to hand over data wherever stored). British control of the software lowers the risk; it does not remove it.

The sharpest data risk is smart-meter readings on a US system. The meter-data layer carries the highest confidentiality concern. The leading meter-data-management system, Itron, is American and runs on Microsoft's cloud - so granular half-hourly readings of how a household uses electricity sit under US legal reach twice over. Britain's central market-data systems, Correla (gas) and ElectraLink (electricity Data Transfer Service), are genuinely UK-owned and pull the layer back, but a supplier's own meter-data system is often Itron.

Flexibility and demand-side response is the British strength. The systems that trade electricity and switch flexible demand on and off (demand-side response, DSR) are the sector's strongest sovereignty position. Flexitricity (Edinburgh), Kaluza and Kraken Flex (both in the Octopus group) and Lunar Energy are all UK-controlled. The one watch item is Limejump, bought by Shell - Shell is Anglo-Dutch rather than American, so jurisdiction stays low, but it shows the layer's ownership can move.

If a supplier pulled the plug, how fast would it hurt?

SPEED OF IMPACT	LAYER	WHAT HAPPENS
Immediate	Identity & access (Microsoft Entra / Okta)	Staff log-in fails within hours - an instant lockout of every cloud system at once.
Fast	Billing / customer information system (CIS)	The meter-to-cash heart; billing and customer management stop within days, and replacing a CIS is a multi-year re-implementation - the deepest re-platform on the profile.
Fast	Meter data & grid operations	Billing-grade meter reads and regulated market interactions stop within days; settlement breaks.
Fast	Cloud	Account suspension propagates quickly to everything hosted on it.
Medium	Payments	Direct-debit collection is the cash engine; card and open-banking flows have a UK fallback.
Medium	Data & BI	Reporting degrades but operations continue for a while.
Slow	Trading & flexibility / DSR	Most UK-controlled and most replaceable - the lowest-exposure technology layer.

What organisations can do about this

BUILDING BLOCK	PRACTICAL STEPS

Billing system (CIS) - favour the British leaders	At the point of choosing or replacing a customer information system, the UK-controlled options in our database are Kraken Technologies and ENSEK (Centrica-owned); Gentrack (New Zealand), Hansen (Australia), SAP (Germany) and Itron (United States) are not UK-controlled. Note that Kraken still runs on Amazon's cloud, so choosing it lowers the jurisdiction risk rather than removing it.
Meter data - prefer the British market systems where you can	Britain's own central market-data infrastructure - Correla (gas) and ElectraLink (electricity Data Transfer Service) - is UK-owned and UK-run; the widely-used meter-data-management system Itron is American and runs on Microsoft's cloud. UK-controlled options in our database also include Stark and Smarter Technologies.
Trading and flexibility (DSR) - protect a position of strength	This layer is already UK-rich: Flexitricity, Kaluza, Kraken Flex and Lunar Energy are UK-controlled. Accept and monitor, and keep an eye on ownership changes - Limejump was acquired by Shell - but this is the sector's strongest sovereignty position.
Cloud and log-in - reduce the American concentration	Moving the cloud and/or staff log-in off Microsoft stops one problem taking down email, reporting, log-in and the meter-data system together. UK and European cloud options in our database: OVHcloud and Scaleway (France), IONOS (Germany), Civo (UK); the open-source log-in system Keycloak, self-hosted, reduces reliance on a single US provider.

Payments - accept and monitor	Keep direct debit over UK banking rails as the main collection method; it is already low-to-medium risk and runs under UK law. The tail is the US card networks behind card payments.

Sources

1. US CLOUD Act 2018 (18 U.S.C. 2713) - compels US-incorporated providers to produce data in their custody wherever in the world it is stored. https://www.govinfo.gov/content/pkg/USCODE-2018-title18/html/USCODE-2018-title18-partI-chap121-sec2713.htm
2. US Foreign Intelligence Surveillance Act, Section 702 (50 U.S.C. 1881a) - a US directed-surveillance authority. https://www.govinfo.gov/app/details/USCODE-2021-title50/USCODE-2021-title50-chap36-subchapVI-sec1881a
3. Vendor ownership and hosting - taken from company filings, public registries (including UK Companies House) and suppliers' own documentation, compiled in the Information Matters UK vendor sovereignty database.

How we did this. We scored each technology layer on four things — supplier concentration, whose laws they answer to, how hard they are to switch, and how essential they are — using the IM Sovereignty Framework and our UK vendor database. Control and hosting facts come from primary sources; the harder-to-quantify judgments are our reasoned view of a typical organisation. Scores are bands, not exact measurements. Full evidence record available on request.

If you have any questions or comments about this article please email info@informationmatters.net