

# Who controls the technology behind a UK farm?

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

June 2026

## The big picture

High

3.7 / 5

For a typical UK farm, the high-exposure blocks cluster around one fact: the farm's most valuable data — the field and machine records produced by its own tractors — is largely owned and controlled by the foreign equipment maker, not by the farmer. For a John Deere farm the field records, the live machine data and the machinery's own electronics all trace back to one US company, under US legal reach. The clear exception is money: banking and government support payments run on UK rails under UK law.

We looked at the everyday layers of technology a UK farm or agribusiness 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<sup>[1]</sup>, and the surveillance powers in Section 702 of the Foreign Intelligence Surveillance Act<sup>[2]</sup> — 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



## Who controls each layer

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

<b>Cloud &amp; compute</b> Microsoft Azure, Amazon Web Services	US
<b>Office &amp; productivity</b> Microsoft 365, Google Workspace	US
<b>Farm management &amp; precision agriculture</b> John Deere Operations Center, Trimble, Climate FieldView, Gatekeeper/Farmplan	US
<b>Connected machinery &amp; telematics</b> John Deere JDLink / Operations Center, CNH (Case/New Holland) AFS, Trimble	US
<b>Livestock &amp; herd management</b> Herdwatch, Breedr, iLivestock, Sum-It, AgriWebb	Mixed
<b>Supply-chain &amp; assurance</b> Muddy Boots/Greenlight, Hectare, Map of Ag, Origin Digital	Mixed

## Data & business intelligence

Trinity AgTech (Sandy), KisanHub, Yagro, Sencrop

UK

## Identity & log-in

Microsoft Entra, Google sign-in, per-app log-ins

US

## Payments, banking & grants

UK banks; Defra / Rural Payments Agency (BPS / ELMS)

UK

*The agricultural concentration story is not a hyperscaler monoculture but equipment-maker control of operational data. A genuine UK-controlled option exists at the farm-management records layer — Gatekeeper/Farmplan (RELX), verified UK — plus UK-controlled choices in livestock (Breedr, iLivestock, Sum-It), supply-chain (Hectare, Map of Ag) and data/BI (Trinity AgTech, KisanHub). The UK-vs-foreign split is: cloud, office, identity, the dominant farm-management/precision-ag and machinery/telematics platforms, and the leading assurance platform are foreign-controlled (mostly US, one Canadian, one German-parent); banking and government grant payments, and a credible minority of the sector apps, are UK-controlled. The data the farm cannot move — machine telematics — is the most foreign-locked layer of all.*

## What this means, in plain terms

**The farmer does not own the farm's data.** The most operationally valuable data a farm produces — every pass, yield map and agronomic record — is uploaded automatically to the equipment maker's cloud. For the market leader, John Deere (US), this is the Operations Center, connecting 500+ million acres worldwide, behind a licence the farmer cannot negotiate and which restricts what the owner can even read on their own machine (the right-to-repair dispute). The farm's most valuable dataset is controlled by a foreign machine maker under US legal reach<sup>[3]</sup>.

**The lock-in is welded to the tractor.** Unlike a law firm or bank, where the lock-in is in software you can in principle move, here the data platform is bundled with machinery costing hundreds of thousands of pounds and replaced only every 10–15 years. You cannot switch it inside a growing season — the concentration is physical, not just contractual. This is the highest single exposure on any IM profile to date (4.75)<sup>[3]</sup>.

**There is a real British option at the records layer.** For the agronomy and field records the farm keeps itself, Gatekeeper / Farmplan — owned by UK-listed RELX — is a genuinely UK-controlled choice. It keeps farm-management concentration from going to maximum and gives farms a repatriation route for the records they can hold, even if raw machine data still lands on the maker's platform.

**A German owner is not a shield.** Climate FieldView, a popular precision-agriculture app, is owned by Germany's Bayer — but it is run by a US subsidiary (The Climate Corporation, St. Louis), so the US CLOUD Act<sup>[1]</sup> still reaches it. We score it the same as a US vendor on legal reach, with the EU parent recorded only as a partial mitigant. Where the data is run matters as much as who ultimately owns it.

**Money is the sovereign exception.** Payments collapse to Low (1.75). Farm banking runs on UK rails under UK law, and the single largest income line — the Basic Payment Scheme and its ELMS successor — is a UK public grant rail run by Defra and the Rural Payments Agency. About as sovereign as a payment gets — the clearest contrast with financial services, where payments are existential.

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

SPEED OF IMPACT	LAYER	WHAT HAPPENS
<b>within days–weeks</b>	Machinery & telematics	losing guidance and telematics mid-season hurts within days–weeks, and years of field-data history are effectively unrecoverable off the maker's platform — the deepest lock-in, recovery well over a year.
<b>varies</b>	Farm management & precision-ag	cropping records and variable-rate maps are the year's operating plan; rebuilding them off a foreign platform is slow (12+ months).
<b>varies</b>	Supply-chain assurance	a lost assurance feed can block the farm from selling into a retailer scheme — the income tap, and the buyer sets the platform.
<b>in lockout fails fastest (under 24h)</b>	Cloud & identity	log-in lockout fails fastest (under 24h); cloud suspension propagates to the SaaS apps above within days.

<b>in the middle of harvest — the true worst case</b>	Per dominant vendor	a single John Deere event takes out farm management, telematics and the machinery data history together, in the middle of harvest — the true worst case, and it is physical, not just a software switch.
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## What organisations can do about this

BUILDING BLOCK	PRACTICAL STEPS
<b>Machinery data</b>	negotiate at purchase: the only point of leverage is when you buy the kit. Insist on data-export rights and keep a parallel field-record off the maker's platform; prefer open machine standards (ISOBUS) where available.
<b>Farm-management records</b>	use the UK option: prefer Gatekeeper / Farmplan (RELX, UK) for the records you control, and keep agronomy data exportable.
<b>Supply-chain assurance</b>	choose UK where the buyer allows: UK-controlled options include Hectare (SellMyLivestock / Graindex) and Map of Ag.
<b>Livestock &amp; herd management</b>	a real UK/Irish choice exists: Breedr (UK), iLivestock (Scotland), Sum-It (UK), Herdwatch (Ireland); note AgriWebb became US-owned in 2026.
<b>Data &amp; reporting</b>	prefer UK-controlled analytics: Trinity AgTech (Sandy) and KisanHub are UK-controlled; check where they host the data.
<b>Payments &amp; grants</b>	already low-risk; accept and monitor.

## 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-part1-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.

This research consists of the opinions of the Information Matters team — human and AI — and should not be considered statements of fact.

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