

Who controls the technology behind a UK construction or property business?

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

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The big picture

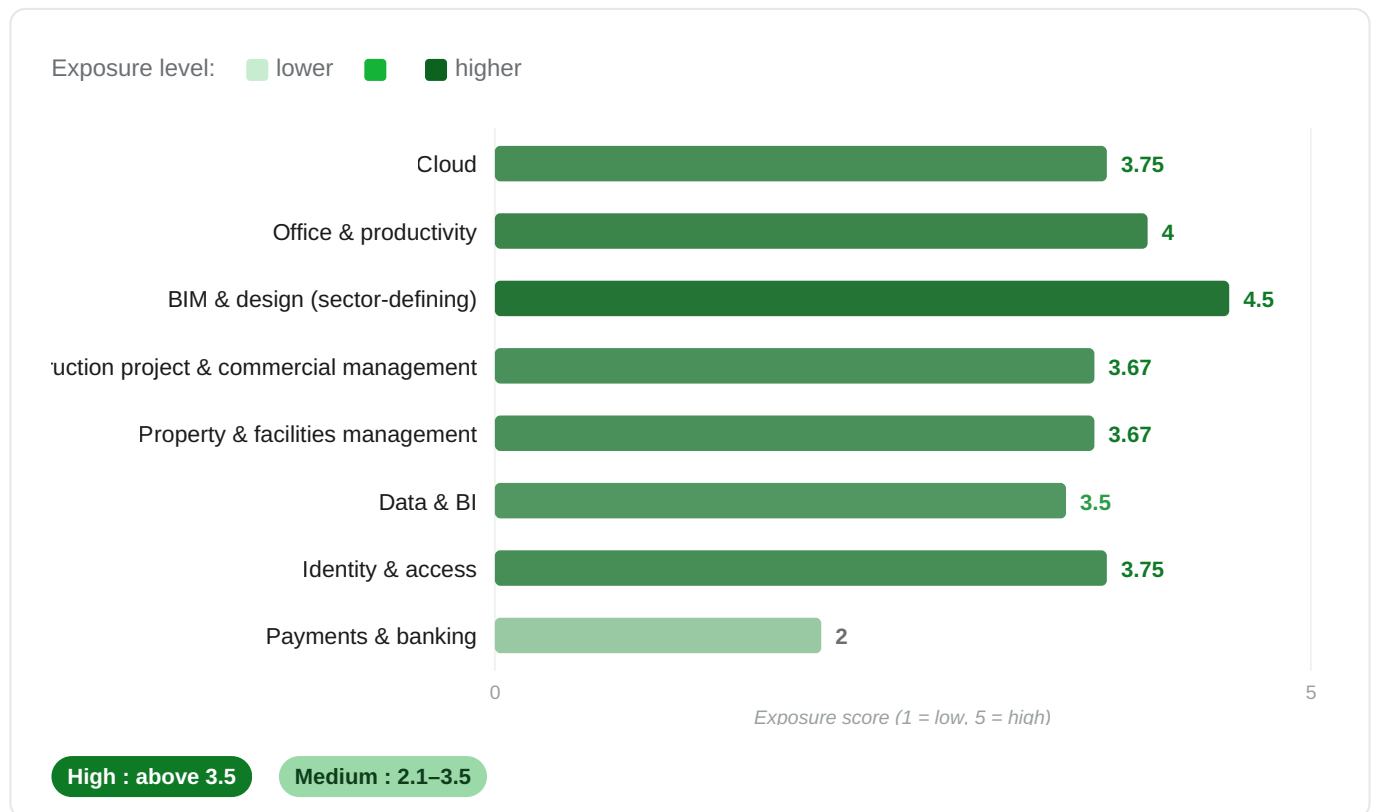
HIGH EXPOSURE

3.7 / 5

For a typical UK contractor, housebuilder or property and facilities manager, seven of the eight technology building blocks are High exposure, with a overall headline score of 3.7. The defining risk is distinctive to this sector: the design and building-information-modelling layer is dominated by a single US supplier, Autodesk, with no UK-controlled alternative at the same scale. The firm's drawings, models and the common data environment that holds them all sit under US legal reach. Only banking is genuinely UK-controlled, and the one bright spot is that construction commercial-management and property and facilities-management software do have real UK-controlled options.

We looked at the everyday layers of technology a UK construction or property business 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



Who controls each layer

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

Cloud Microsoft Azure / Amazon Web Services	US
Office & productivity Microsoft 365	US
BIM & design (sector-defining) Autodesk / Bentley Systems / Nemetschek	US
Construction project & commercial management Procore / RIB Software / COINS / Causeway	US
Property & facilities management MRI Software / Yardi / Aareon / Reapit / Re-Leased	US
Data & BI Microsoft Power BI	US
Identity & access	

Payments & banking

UK business banks

UK

Only one of the eight layers - business banking - is genuinely UK-controlled. The design and BIM layer is the most exposed, dominated by US Autodesk with no UK alternative at scale. The two operational layers (construction project/commercial management and property/facilities management) are the bright spot: both have genuinely UK-controlled options (COINS, Causeway, Asite, Eque2; Reapit, Goodlord, Dezrez, Concerto) usable as mitigations.

What this means, in plain terms

Design and BIM are a near-monopoly under one US supplier. Construction is unusual: its defining tool is design and building-information-modelling (BIM) software, and one US company - Autodesk, maker of AutoCAD and Revit - so dominates the market that there is no UK-controlled alternative at the same scale. Bentley Systems is also US-controlled; the only large non-US option is Germany's Nemetschek. The firm's drawings, 3D models and the common data environment (the shared store the whole project team works from) therefore sit with a single US supplier you cannot easily inspect, cannot quickly leave, and which is reachable under US law. In our analysts' view this concentration on one foreign vendor is the sharpest sovereignty risk in the sector ^[3].

The drawings and models are slow and costly to move. BIM models are large, interconnected and tied to the vendor's own file formats (Revit's.rvt, for example). A project that has standardised on Autodesk's tools and its common data environment has years of design work locked into one supplier's formats, so leaving means re-creating or converting models as well as switching software. That deep lock-in is why this layer scores higher than cloud or office software ^[3].

Project and property management is where UK options actually exist. Unlike BIM, the systems that run construction projects and manage property and facilities do have genuine UK-controlled choices. In construction commercial management, COINS, Causeway, Asite and Eque2 are UK-controlled, alongside US Procore and Oracle Aconex and France's RIB. In property and facilities management, Reapit, Goodlord, Dezrez and Concerto are UK-controlled, against US MRI, Yardi, Arthur and Fixflo and Germany's Aareon. These are the layers where a UK-origin choice is realistic at renewal.

Microsoft sits under a large share of the stack. Microsoft controls the cloud (Azure), the office software (Microsoft 365), the reporting tools (Power BI) and the staff log-in (Entra) - and several sector systems run on Azure (Bentley, Eque2, Fixflo) while others run on Amazon (Autodesk, Nemetschek, Arthur). The variety of construction-software brands hides the fact that much of it ultimately sits on one of two American clouds, so even non-US suppliers often inherit a US substrate.

Property managers hold tenant and resident personal data under foreign reach. A property or facilities manager's systems hold tenant and leaseholder personal data, rent and arrears records and maintenance histories. Where that runs on US-controlled software (MRI, Yardi, Arthur, Fixflo) the personal data of residents is reachable under the US CLOUD Act^[1] (the Clarifying Lawful Overseas Use of Data Act 2018). The confidentiality concern is highest here and on the design layer.

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

SPEED OF IMPACT	LAYER	WHAT HAPPENS
Immediate	Identity & access (Microsoft Entra)	Staff log-in fails within hours - an instant lockout of every cloud system at once.
Fast	BIM & design (Autodesk)	Live design and the common data environment stop within days; with no UK alternative at scale, re-platforming the design suite and converting years of models could take well over a year.
Fast	Cloud	Account suspension propagates quickly to everything hosted on it.
Medium	Construction project & commercial management	Valuations, cost control and project records stall within weeks; a real UK-controlled alternative exists, so migration is feasible but slow.
Medium	Property & facilities management	Rent, maintenance and tenancy operations degrade over weeks; UK-controlled options make a move realistic.
Slow	Payments & banking	Low exposure - not a crisis layer for a construction or property business.

What organisations can do about this

BUILDING BLOCK	PRACTICAL STEPS
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BIM and design - the hardest problem, so manage it deliberately

There is no UK-controlled BIM suite at Autodesk's scale, so this is about reducing lock-in rather than replacing the vendor. Always keep exportable copies of models in the neutral open format (IFC, Industry Foundation Classes) so you are never trapped in one supplier's files, and run the common data environment in the UK region where the supplier offers it. The only large non-US alternative is Germany's Nemetschek; Bentley is also US-controlled. In our view, treat IFC export discipline as the single most useful protection here.

Construction project and commercial management - choose UK at renewal

This is a layer where a UK-controlled choice is real. UK-controlled options in our database include COINS, Causeway, Asite and Eque2. The widely-used Procore and Oracle Aconex are American and RIB is French. Contracts run for years, so renewal is the decision point.

Property and facilities management - UK options exist, use them

UK-controlled options in our database include Reapit, Goodlord, Dezrez and Concerto (Concerto hosts in its own UK data centre). The large incumbents MRI, Yardi, Arthur and Fixflo are US-controlled and Aareon is German. Where you hold tenant and resident personal data, prefer a UK-controlled supplier and check where it hosts.

Cloud and log-in - reduce the Microsoft concentration

Moving the cloud and/or staff log-in off Microsoft stops one problem taking down email, reporting, log-in and computers together. UK and European cloud options: 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 and banking - accept and monitor

Already low-risk; business banking and subcontractor payments run over UK rails under UK law.

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.
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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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