

Who controls the technology behind a UK manufacturer?

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

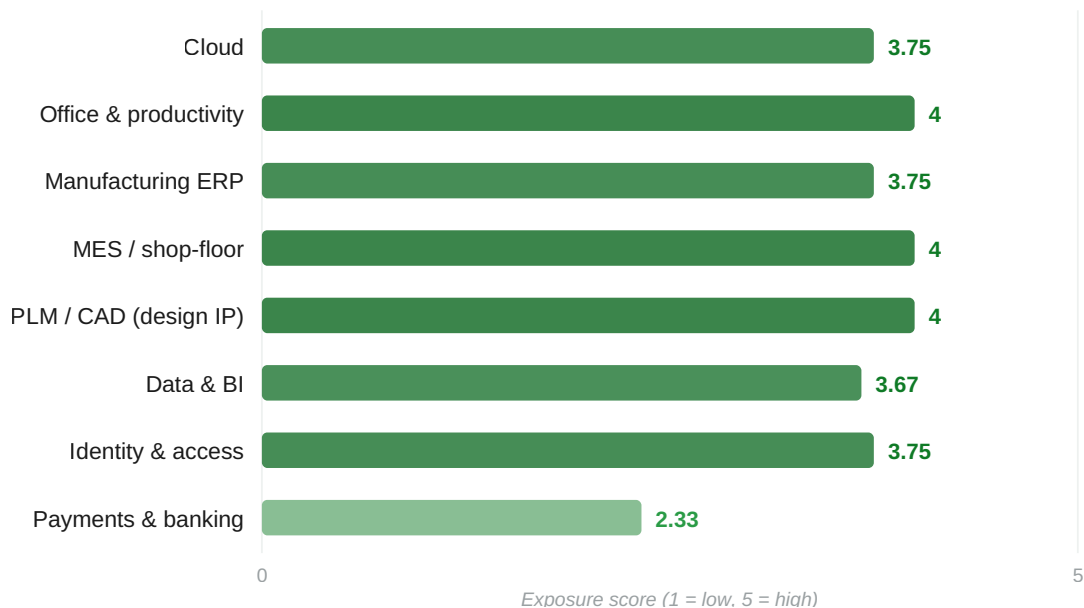
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For a typical UK mid-size manufacturer, seven of the eight technology building blocks come out as high exposure. The defining risk is distinctive to this sector: the software that runs the live production line, and the firm's crown-jewel product designs, both sit with foreign-controlled suppliers and under foreign legal reach. Only the firm's banking is genuinely UK-controlled.

We looked at eight everyday layers of technology a UK manufacturer relies on, from the cloud it runs on to the software that runs the production line. A supplier owned in the United States can be required to hand over data under the US CLOUD Act even when that data is stored in Britain^[1]; 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 ■ UK-controlled

Cloud Microsoft Azure / Amazon Web Services	US
Office & productivity Microsoft 365	US
Manufacturing ERP Infor / Epicor / SYSPRO / Plex / IFS	US
MES / shop-floor PTC / Tulip / Lighthouse / Siemens / AVEVA	US
PLM / CAD (design IP) PTC / Siemens / Dassault / Autodesk	US
Data & BI Seeq / Microsoft Power BI	US
Identity & access Microsoft Entra	US
Payments & banking UK business banks	UK

Only one of the eight layers - business banking - is genuinely UK-controlled; all seven technology layers are foreign-controlled (six US-dominated, with European options available as mitigations rather than incumbents).

What this means, in plain terms

The production line itself runs on foreign-controlled software. A manufacturer is unusual among the businesses we have profiled: its actual production process depends on a manufacturing execution system (MES) supplied by a US company (PTC, Tulip, Lighthouse) or a large continental-European one (Siemens in Germany, AVEVA in France)^[3]. A law firm's documents can wait; a production line that loses its control system stops making things - and these systems are closed black boxes you cannot easily inspect or pause.

The crown-jewel design IP sits under foreign law. The firm's most valuable asset - its product designs and engineering know-how - lives in PLM/CAD (product lifecycle management / computer-aided design) software that is almost entirely foreign-controlled: PTC and Autodesk (United States), Siemens and Dassault (Germany and France)^[3]. This is the highest-sensitivity data on the profile, held in systems reachable under the US CLOUD Act and related US surveillance law^{[1][2]}, and very slow and costly to move.

ERP is the operational core, and it is US-dominated. The central business system - enterprise resource planning (ERP) - runs orders, stock, planning and finance. The packages most UK manufacturers use (Infor, Epicor, SYSPRO, Plex) are all US-controlled^[3], and several host on Microsoft Azure or Amazon Web Services, so the ERP layer depends on a US supplier twice over. The credible non-US option is Sweden's IFS.

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 factory systems (Epicor, SYSPRO, IFS) run on Azure while others (Infor, Lighthouse) run on Amazon^[3]. The apparent variety of factory-software brands hides the fact that nearly everything ultimately sits on one of two American clouds.

Concentration is the one thing the sector does well. Unlike cloud or Microsoft 365, manufacturing ERP, MES and PLM have genuine multi-vendor choice, including credible European-controlled options (IFS, Siemens, Dassault, AVEVA) and a handful of genuinely UK-controlled smaller packages (Exel, WinMan, Cimlogic, FourJaw). That choice lowers concentration - but not jurisdiction, because the realistic alternatives are mostly continental-European, not British.

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.
Immediate	MES / shop-floor	The production line stops within hours to days; re-equipping it with a different control system could take well over a year.
Fast	Manufacturing ERP	Orders, planning and dispatch halt within days; replacing an ERP is a 6-18-month re-implementation compressed into a crisis.
Fast	Cloud	Account suspension propagates quickly to everything hosted on it.
Medium	PLM / CAD	Engineering can limp on local copies for a short while, but migrating the full design vault is very slow.
Slow	Payments & banking	Low exposure - not a crisis layer for a manufacturer.

What organisations can do about this

BUILDING BLOCK	PRACTICAL STEPS
Design IP (PLM/CAD) - protect the crown jewels first	Always keep an exportable copy of the design vault in neutral open formats (STEP, JT) so you are never trapped. Where re-platforming is realistic, the main non-US options are European - Siemens (Germany) and Dassault (France). No UK-controlled suite exists at this scale, so this is about choosing the less-exposed foreign option.
Shop floor (MES) - reduce the black box	Prefer a European-controlled system, or one built by a UK system integrator on UK infrastructure, and insist on the right to inspect and pause it. Genuinely UK-controlled options in our database: Cimlogic and FourJaw Manufacturing Analytics.

ERP - choose carefully at renewal

ERP contracts last years, so renewal is the decision point. UK-controlled packages in our database: Exel Computer Systems (EFACS) and WinMan. Credible European options: IFS (Sweden), Forterro (Switzerland), Columbus Global (Denmark), Katana and MRPeasy (Estonia). The widely-used names - Infor, Epicor, SYSPRO, Plex - are all American.

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).

Payments and banking - accept and monitor

Already low-risk; business banking runs 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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