

Who controls the technology behind a UK media or creative business?

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

June 2026

The big picture

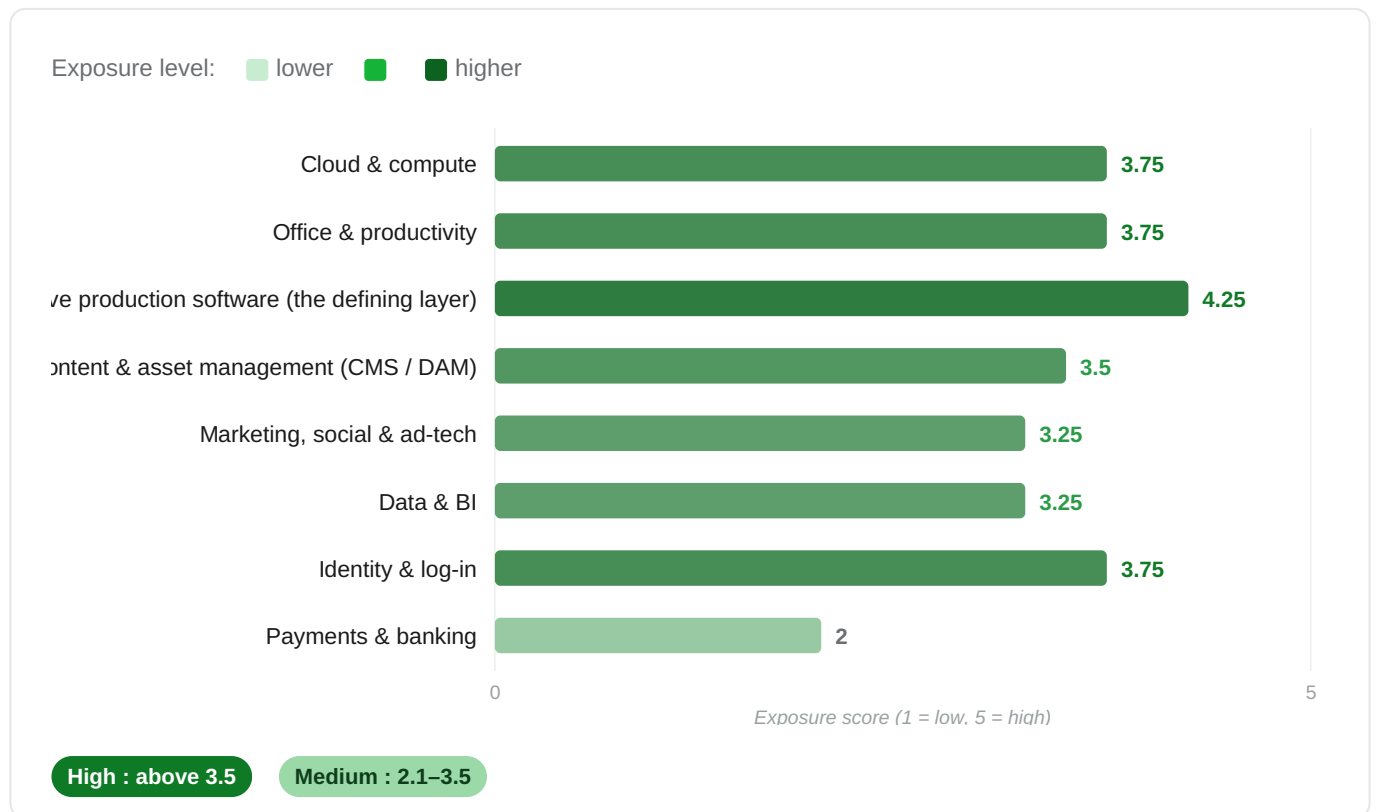
HIGH EXPOSURE

3.6 / 5

For a typical UK media, creative, marketing or publishing business, five of the eight building blocks score High exposure, and the sharpest of all is the one the work is actually made in: creative production software, where Adobe holds a near-monopoly and its proprietary file formats make leaving genuinely hard. The cloud, office software, the creative tools and the staff log-in are all US-controlled. Payments is the one low-risk layer. The defining problem is not data loss but dependency: the craft itself runs on one American supplier's tools and file formats.

We looked at the everyday layers of technology a UK media, creative or marketing 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

<p>Cloud & compute Amazon Web Services / Microsoft Azure / Google Cloud</p>	US
<p>Office & productivity Microsoft 365 / Google Workspace</p>	US
<p>Creative production software (the defining layer) Adobe Creative Cloud (near-monopoly) + Canva, Frame.io, Avid — UK/EU options: Affinity/Serif (was UK, now Canva/AU), DaVinci Resolve (AU), open-source GIMP/Krita/Blender/Inkscape</p>	US
<p>Content & asset management (CMS / DAM) WordPress/Automattic, Adobe Experience Manager, Contentful, Sitecore, Brightcove — UK/EU: Contentful (Germany), Cinegy (Germany), Umbraco (Denmark), self-hosted WordPress</p>	US
<p>Marketing, social & ad-tech HubSpot, Hootsuite, Salesforce, Brandwatch, Cision, Meltwater — UK: Roxhill Media; EU: Meltwater (Netherlands)</p>	US
<p>Data & BI Google Analytics / Looker / Microsoft Power BI / Adobe Analytics</p>	US

Identity & log-in

Microsoft Entra / Okta / Google sign-in

US

Payments & banking

UK banking / Stripe / GoCardless — mostly UK rails for an agency or studio

UK

Genuinely UK-controlled options in our data are thin in the layers that matter most. Creative tooling: the strongest UK-origin product, Affinity (Serif, Nottingham), is now Australian-owned (Canva, 2024) — ownership, not origin, is the test; Synthesia and Blackbird are UK-controlled but narrower tools. Content management: self-hosted WordPress (open-source) hosted in the UK is the clearest lever; EU-controlled options are Contentful and Cinegy (Germany), Umbraco (Denmark). Marketing/PR: Roxhill Media (UK), Meltwater (Netherlands). The defining gap is design and video editing, where there is no full-parity UK-controlled alternative to Adobe — open-source (GIMP, Krita, Inkscape, Blender) and the Australian DaVinci Resolve are the realistic non-US routes, with feature and format trade-offs.

What this means, in plain terms

The defining risk: the craft runs on one American supplier's tools. Unlike most sectors, a creative business's sharpest dependency is not its cloud or its data — it is the software the work is made in. Adobe Creative Cloud (Photoshop, Illustrator, InDesign, Premiere, After Effects) is a near-monopoly across design, photo, layout and video, and Adobe is US-incorporated, so the tools sit under US legal reach (the CLOUD Act^[1]). What makes this the defining layer is not jurisdiction but lock-in: Adobe's file formats (PSD, AI, INDD) are proprietary, so years of working files are effectively trapped in Adobe's tools. You can change your subscription, but the format keeps you in — you swapped the contract, not the lock-in. Adobe also owns Frame.io (video review), so even the collaboration layer around the work is Adobe. That is the highest switching cost on this board (S=5) and our analysts' single biggest concern for the sector^[3].

Five of eight layers are US-controlled — and they overlap. The cloud, the office software, the creative tools, the staff log-in and most of the marketing and analytics stack are all American. Microsoft and Google each tend to pull cloud, office software, log-in and analytics together; Adobe pulls creative tooling, asset management (Adobe Experience Manager) and analytics together. So a typical creative business has two American giants — one of Microsoft/Google for the office and one Adobe for the craft — sitting under most of what it does. That correlates the failures: one outage, account action or legal order touches several layers at once^[3].

There are real UK and EU options — but the strongest one just changed hands. The most credible UK challenger to Adobe in our data is Affinity (made by Serif, Nottingham) — professional design tools sold as a one-off purchase, not a subscription, with no proprietary-format lock-in. But Serif was acquired by Canva (Australian-controlled) in 2024, so the leading 'British' alternative is now Australian-owned — a textbook case of why ownership, not where the product was built, is the test. Genuine open-source options exist (GIMP, Krita, Inkscape, Blender for 3D, DaVinci Resolve for video — the last is Australian) and reduce both jurisdiction and lock-in, but rarely at full feature parity for a professional studio. In content management, self-hosted WordPress, Contentful (Germany), Umbraco (Denmark) and Cinegy (Germany) are real EU/UK-controllable choices.

The website and asset library are a quieter, deeper dependency. A publisher or agency's website and its asset library hold the finished, published work and the brand archive. WordPress powers a large share of the web and is open-source — self-hosting it in the UK is a genuine sovereignty lever — but the company behind WordPress.com and the commercial ecosystem, Automattic, is US-controlled, as are Adobe Experience Manager, Sitecore and the video platform Brightcove. Contentful (Germany) is the clearest EU-controlled option. Switching a CMS or migrating a DAM is a multi-month project, so this layer is a slow but real lock-in even though it rarely halts the business in hours.

Payments is the one low-risk layer. Unlike a retailer or a bank, a typical agency, studio or publisher is not card-payment-dependent: it invoices clients and runs its money over UK banking rails under UK law. Where card or recurring payments are used (a subscription publisher, say), Stripe (US) or GoCardless (UK) appear, but for most creative businesses payments is peripheral and low-exposure — the clearest contrast with the consumer-facing sectors.

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

SPEED OF IMPACT	LAYER	WHAT HAPPENS
Hours–days	Identity & log-in	Staff are locked out of every connected system at once; fastest failure, gates access to the cloud, files and creative tools.
Days	Creative production software (Adobe)	Subscription suspension locks the studio out of the tools the work is made in. Re-tooling onto open-source or Affinity is possible but means retraining and re-working files trapped in proprietary formats — weeks to months, and quality/feature gaps remain.
Days	Cloud & compute	Account suspension propagates quickly; hosting, rendering and storage degrade. Migration is a multi-month project.

Days	Office & productivity	Email and shared documents stop; the office cannot coordinate. Recoverable but disruptive.
Weeks–months	Content & asset management (CMS / DAM)	The website and asset library degrade slowly; published content stays live for a while, but a forced migration of a CMS or DAM is one of the deepest projects on the board.

What organisations can do about this

BUILDING BLOCK	PRACTICAL STEPS
Creative production software — the defining layer	Treat the Adobe format lock-in as the priority, because it is the deepest and most specific to this sector. Keep working files exported in open or interchangeable formats where the workflow allows (TIFF, PNG, SVG, PDF/X, ProRes) so the archive is not trapped in PSD/AI/INDD. Weigh Affinity (now Canva/AU-owned — lowers lock-in and subscription dependence, but ownership is Australian, not British) and open-source tools (GIMP, Krita, Inkscape, Blender, DaVinci Resolve) for parts of the workflow that do not need full Adobe parity. Our analysts' view: full repatriation is not realistic today, but reducing format lock-in is, and it is the move that matters most.
Content & asset management	Self-host WordPress in the UK (open-source — a genuine sovereignty lever), or prefer EU-controlled options such as Contentful (Germany), Umbraco (Denmark) or Cinegy (Germany) at the next platform decision. This lowers jurisdiction one rung (US → 4 to EU → 2–3) or, for UK-hosted open-source, towards 1 — but only at a re-platforming, which is slow, so the renewal is the moment to choose.
Marketing, social & ad-tech	This layer has the most painless UK/EU choice because switching costs are lower. Meltwater (Netherlands) and Roxhill Media (UK) are non-US options for PR and media monitoring in our data. Where US tools (HubSpot, Salesforce, Brandwatch, Cision) are kept, insist on UK/EU data residency and UK/EU-law contracting — this lowers the practical blast radius but does not remove US legal reach under the CLOUD Act.

Cloud, office, identity & concentration

Avoid taking cloud, office software, log-in and analytics all from one US giant — splitting them reduces the single-vendor blast radius even if every part is still foreign. UK and European cloud options (OVHcloud, Scaleway, IONOS) and the open-source log-in system Keycloak, self-hosted, reduce reliance on a single US provider.

Payments & banking

Already low-risk for a typical creative business — accept and monitor. Only a subscription or e-commerce publisher with heavy card dependence needs to revisit this layer.

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.

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

Information Matters · informationmatters.net

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