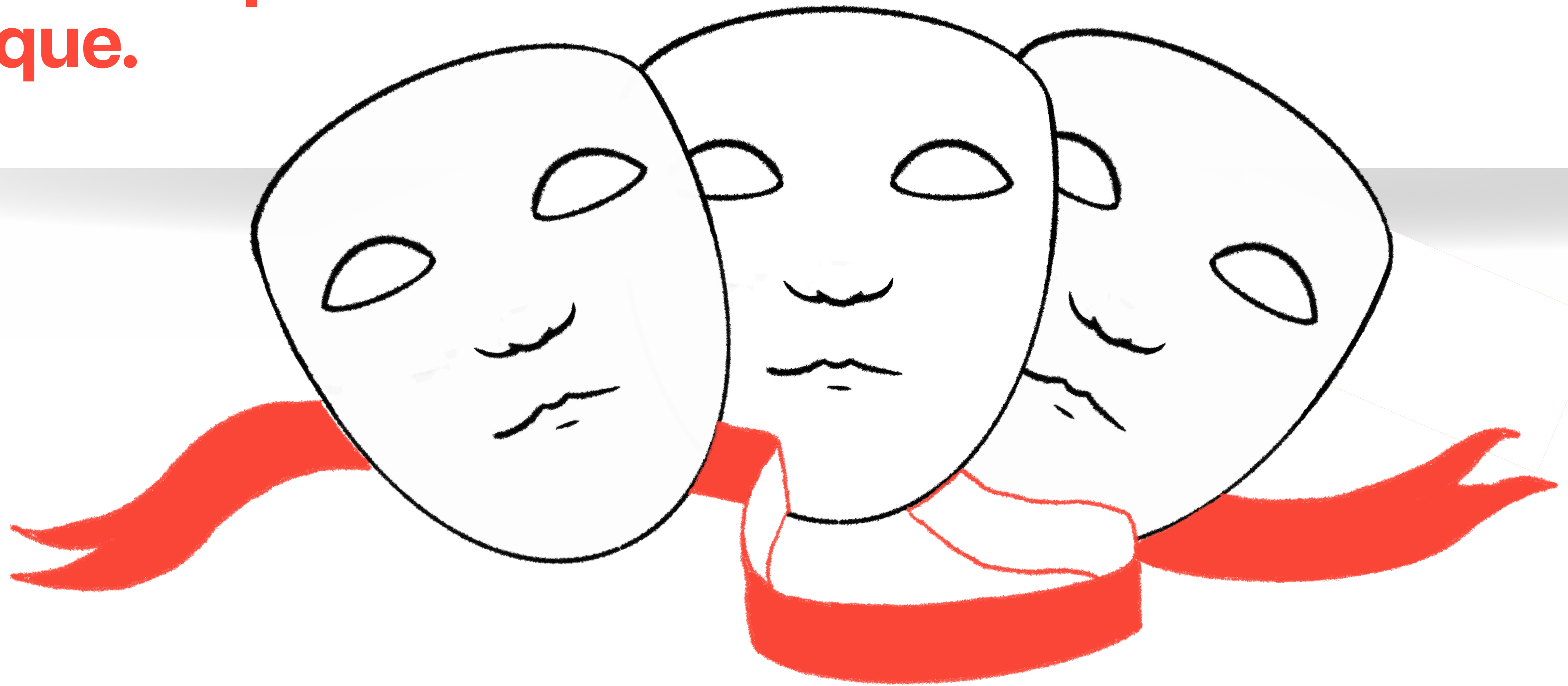


How Google, Meta, & Amazon drive the governance of the digital ad industry



The digital ad
industry is **complex**
and opaque.

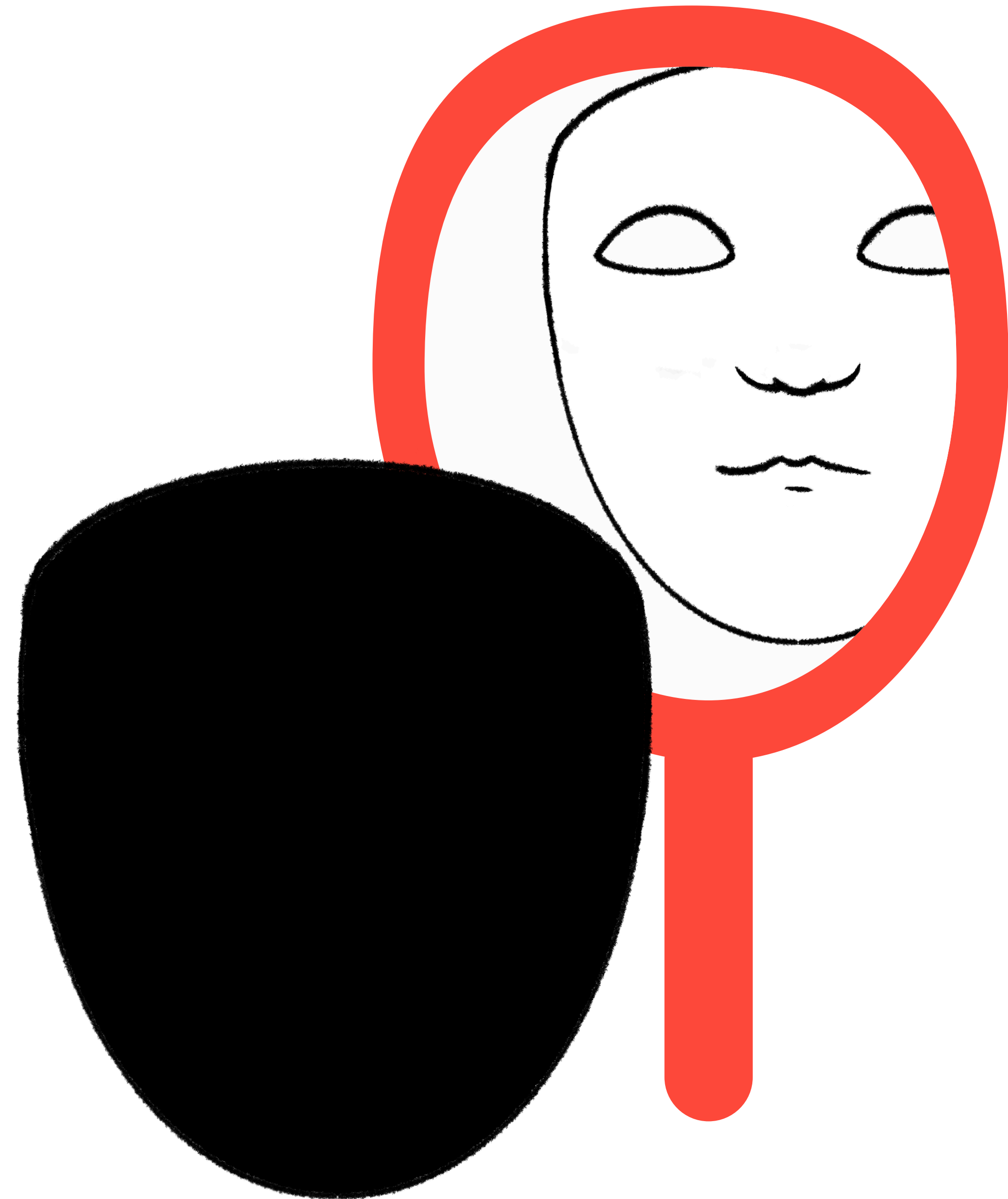


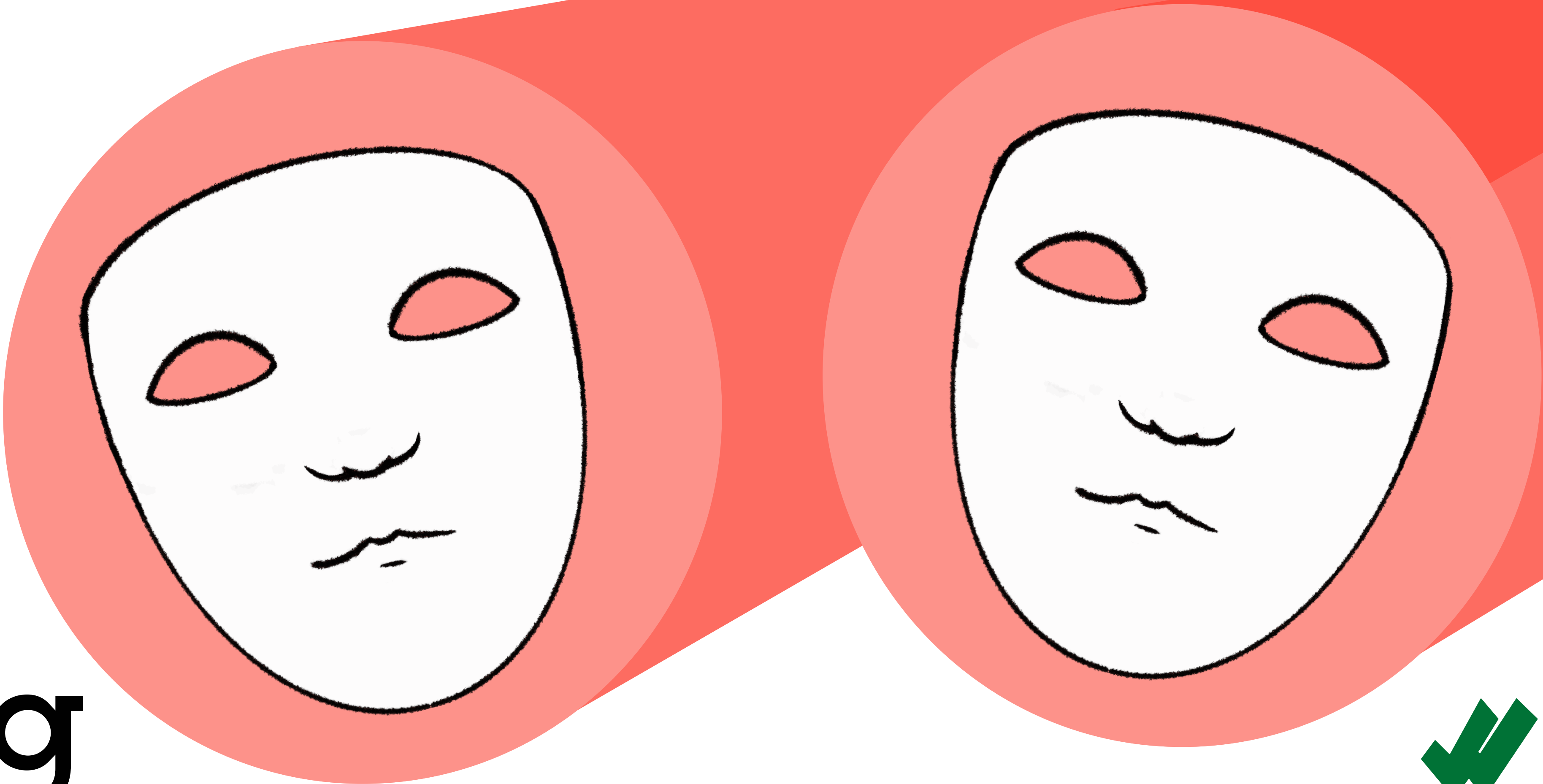
The industry is largely unregulated, relying instead on self-regulation.

In the digital ad industry, the role of governance is provided via certification by standard setting organizations.

The criteria for these certifications are defined by these entities which are heavily influenced by those very same vendors.

The result is the opposite of regulation, where big vendors are free to set the guard rails as they like, resulting in a market that becomes less safe for everyone involved.

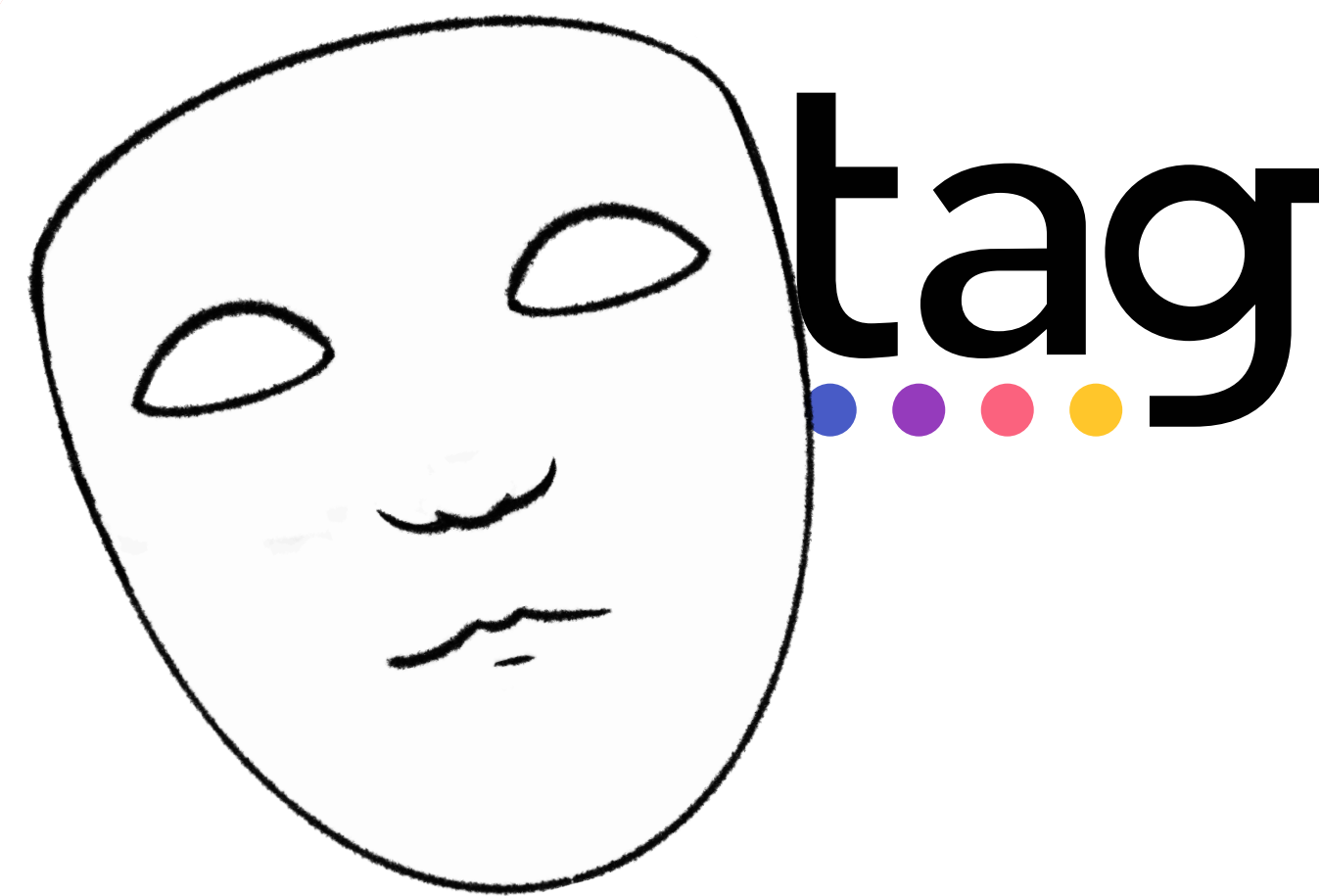




tag

✓ MRC

Who are the certifying bodies?



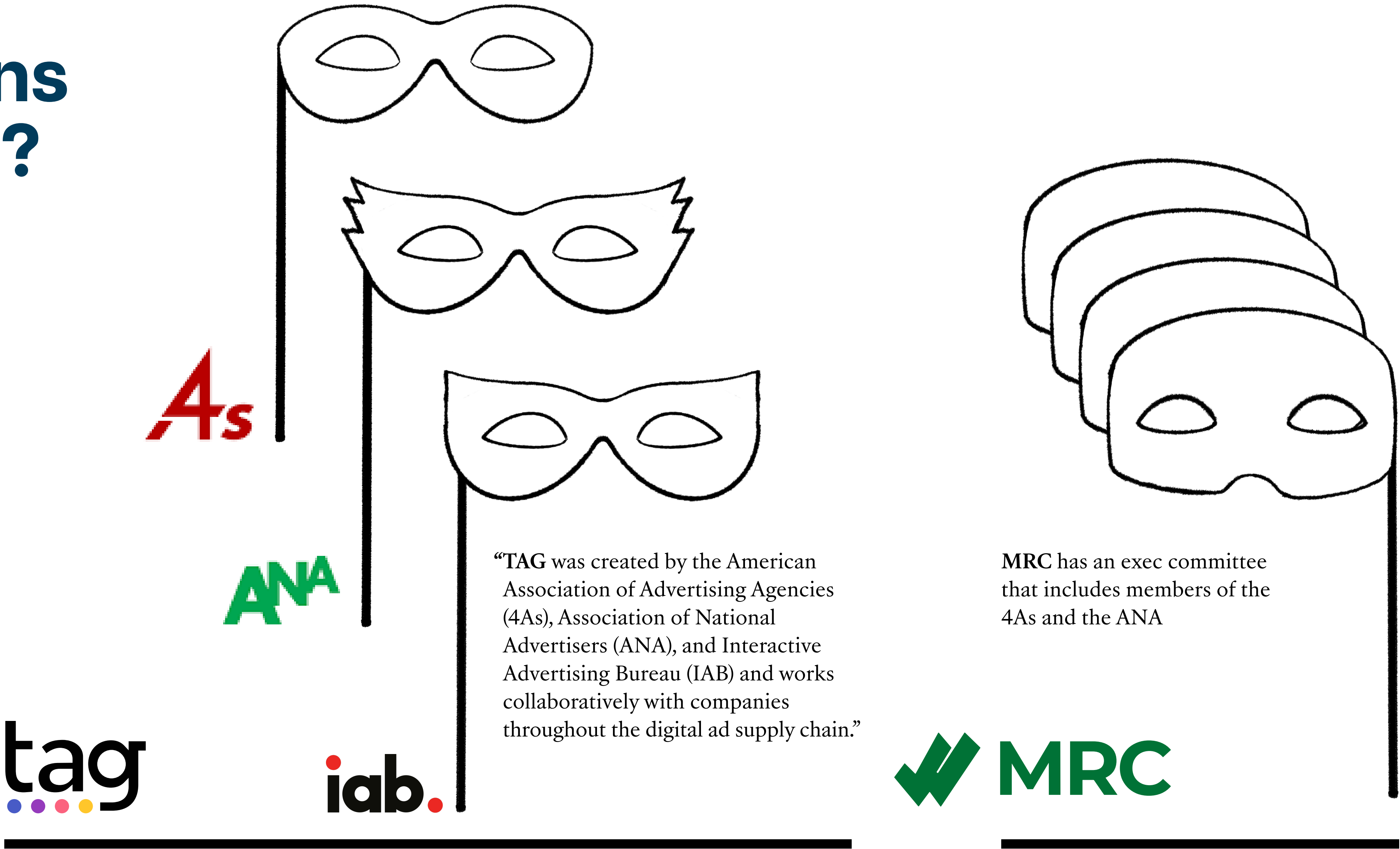
Standard setting organizations like TAG and MRC play the role of governance within the digital ad industry.

“TAG was created by the American Association of Advertising Agencies (4A's), Association of National Advertisers (ANA), and Interactive Advertising Bureau (IAB) and works collaboratively with companies throughout the digital ad supply chain.”

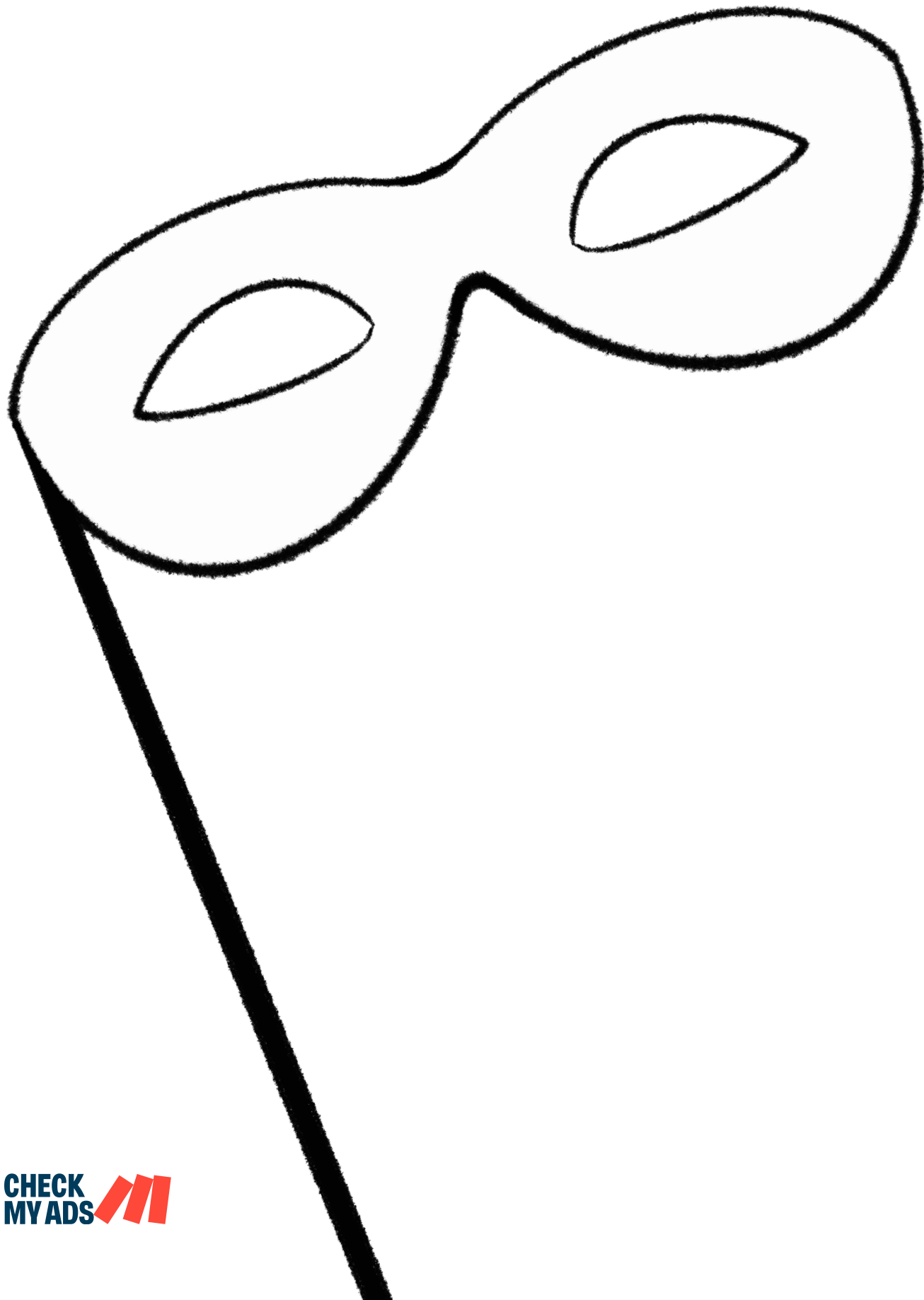


“Media Rating Council seeks to improve the quality of measurement services and data source products to provide a better understanding of the applications (and limitations) of the information and services delivered.”

Who governs MRC & TAG?



TAG Leadership Council



MRC Leadership

MRC has an exec committee that includes members of the 4As and the ANA

Mission

History of MRC

Audit and Accreditation Process

Leadership

Professional Staff



George W. Ivie
CEO & EXECUTIVE DIRECTOR



Ron Pinelli
SVP, DIGITAL RESEARCH AND STANDARDS



Hannah Bolcar
DIRECTOR, MEASUREMENT AUDIT OPERATIONS

Support Staff



Albana Gashi
EXECUTIVE ASSISTANT & OFFICE MANAGER



Carol Gonzalez
OFFICE ADMINISTRATOR & FINANCE MANAGER

Executive Committee

CHAIR

Kevin Stuart

VP, RESEARCH
HEARST TELEVISION

TELEVISION COMMITTEE CHAIR

Brian West

SVP, DATA & MEASUREMENT STRATEGY
NBCUNIVERSAL

DIGITAL COMMITTEE CHAIR

Celeste Castle

EVP, HEAD OF RESEARCH AND MEASUREMENT
AMPLIFI

OUT-OF-HOME COMMITTEE CHAIR

Ashwini Karandikar

EVP - MEDIA, TECH & DATA
AMERICAN ASSOCIATION OF ADVERTISING AGENCIES (4AS)

CHAIR EX OFFICIO

Annette Malave

SVP, INSIGHTS
RAB

RADIO COMMITTEE CHAIR

Tom Dohler

VICE PRESIDENT, AUDIO RESEARCH
TELEVISAUNIVISION

PRINT & DATA QUALITY CHAIR

Jackson Bazley

EVP, MEASUREMENT FOR MARKETERS
ASSOCIATION OF NATIONAL ADVERTISERS (ANA)

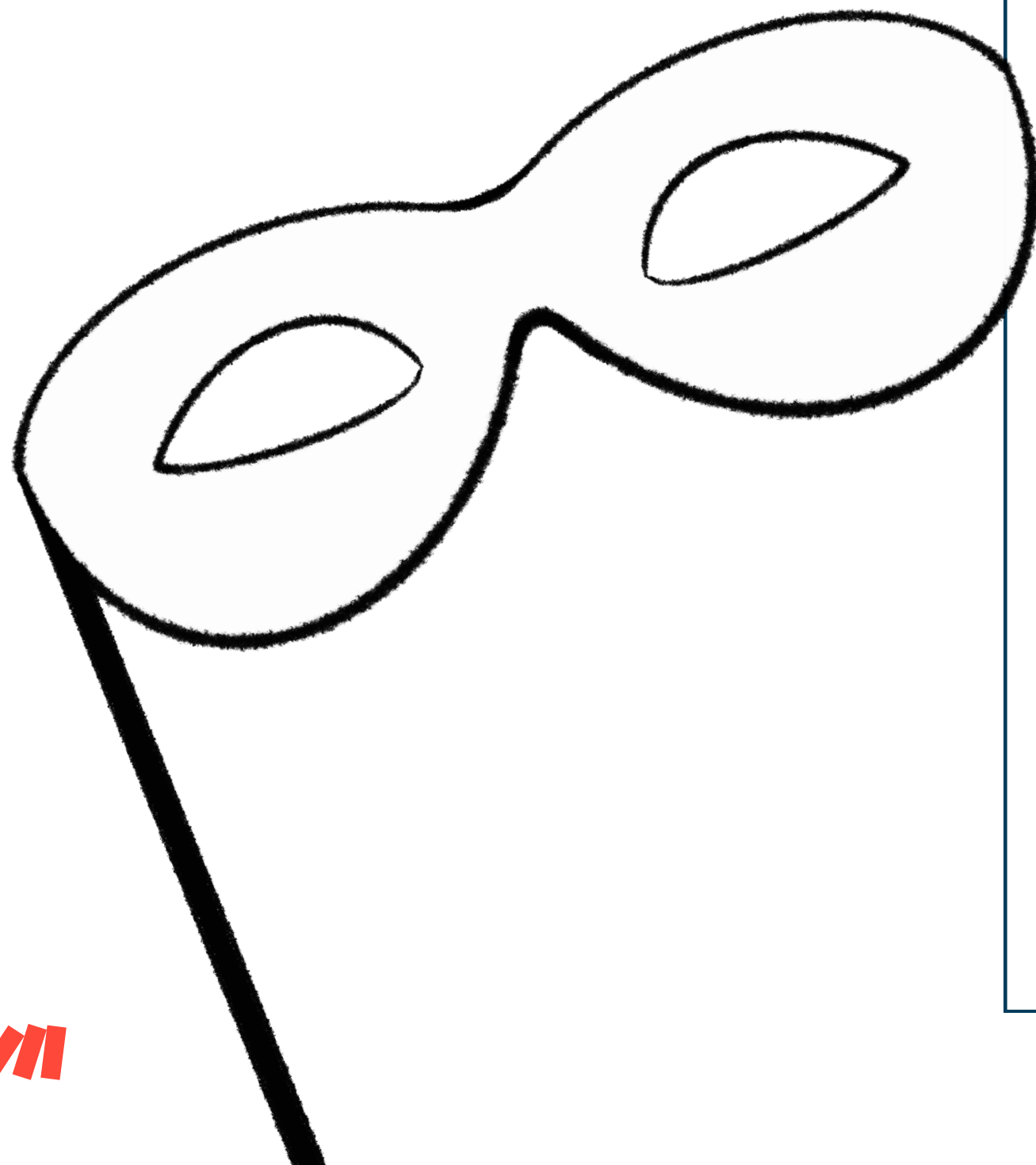
INTERNATIONAL COMMITTEE CHAIR

Tony Squires

GLOBAL COMMERCIAL MEDIA DIRECTOR
MARS INC.

Source: [Media Rating Council](#)

Meta's associations, coalitions, & organizations



Memberships and Independent Organizations

Meta belongs to various trade groups and organizations representing diverse views and communities. Our team also works with independent third-party organizations on issues relating to technology and internet policy and we sometimes support their events that highlight internet and social media issues. We seek to participate in conversations about the issues that directly affect our company and the experience of the people who use our service. We chose these organizations because they are engaged in meaningful dialogue about either the internet or the local communities in which we operate. While we actively participate in these discussions and believe collaborative problem solving is the best way to address a problem and have the greatest impact, we do not always agree with every policy or position that individual organizations or their leadership take. Therefore, our membership, work with organizations, or event support should not be viewed as an endorsement of any particular organization or policy.

While the groups we work with will continue to evolve, below please find a representative list of the ones we have worked with in 2025. When possible, we link to the organization's website, so that you may find out more about them.

Associations, Coalitions, and Membership Organizations:

[AI Alliance](#)

[AI Infrastructure Coalition](#)

[AI Progress](#)

[Albuquerque Hispano Chamber of Commerce](#)

[Albuquerque Regional Economic Alliance \(AREA\)](#)

[Allegheny Conference on Community Development](#)

[Altoona Chamber of Commerce](#)

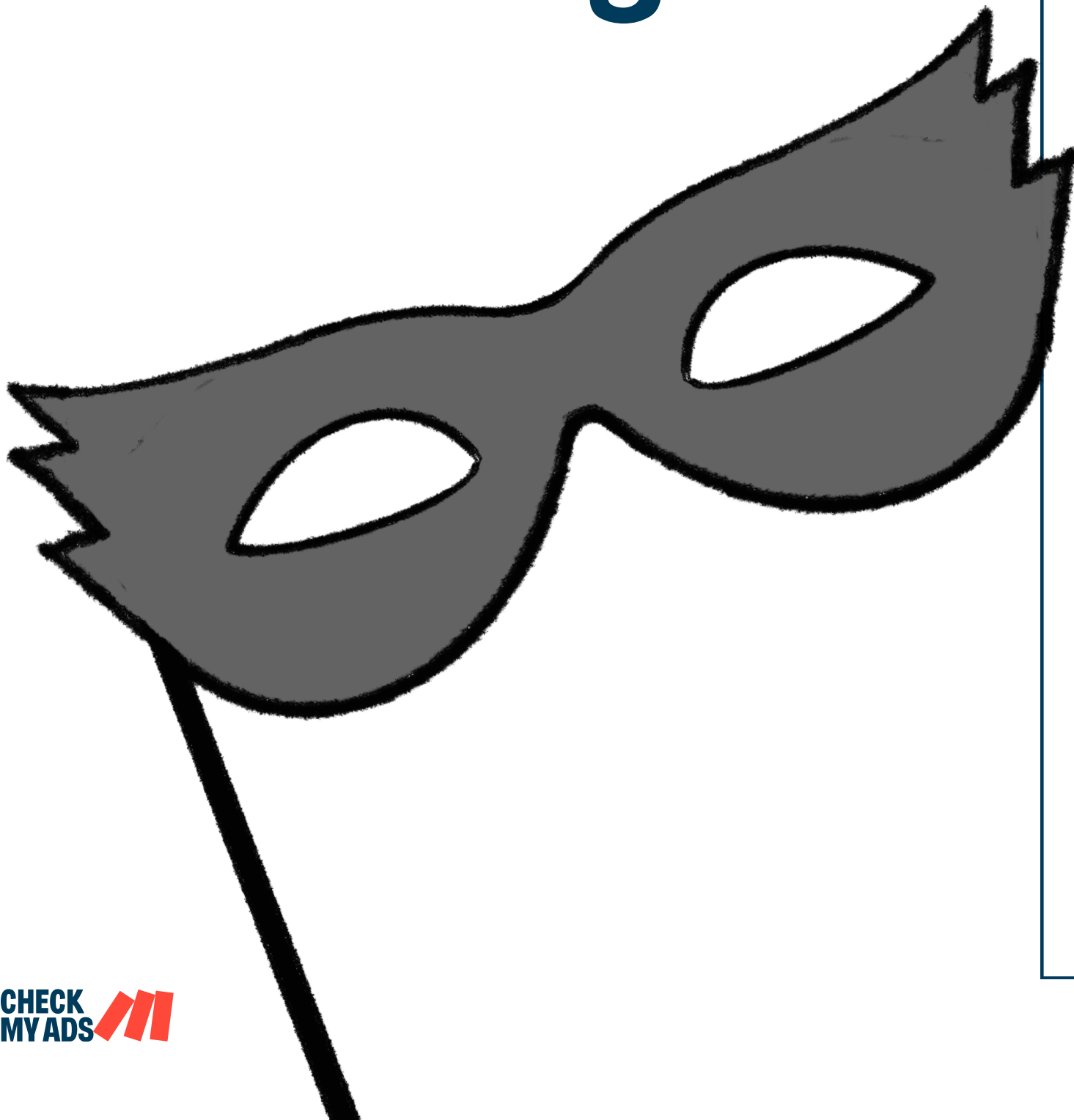
[American Association of Advertising Agencies \(4As\)](#)

[Arizona Chamber of Commerce and Industry](#)

[Arizona Technology Council](#)

[Association of National Advertisers](#)

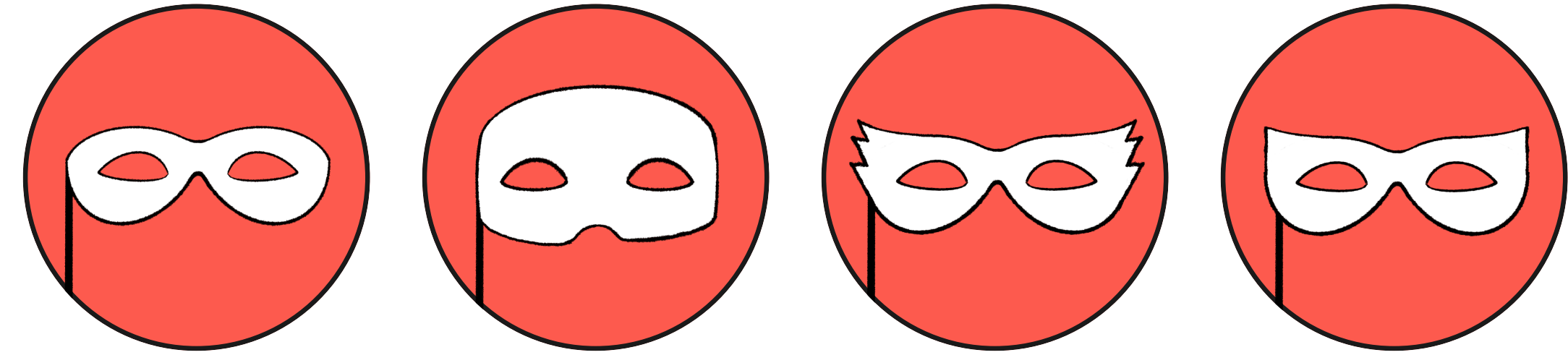
Organizations receiving substantial contributions from Google



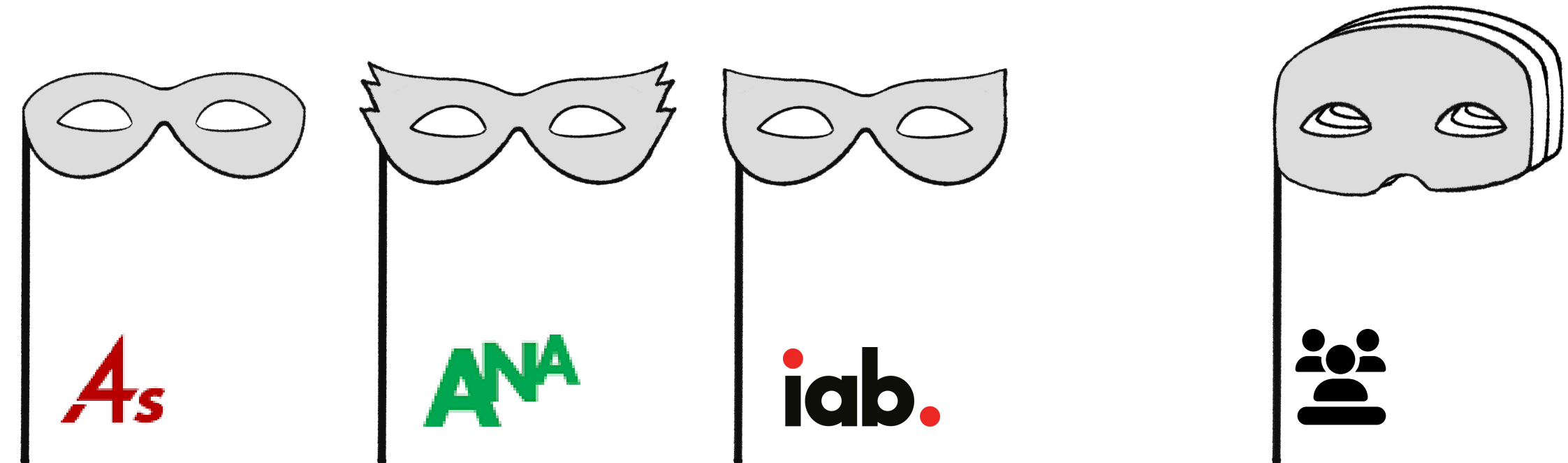
Note: This document is updated annually and includes a list of politically-engaged trade associations, independent third-party organizations and other tax-exempt groups that receive the most substantial contributions from Google's U.S. Government Affairs and Public Policy team.		
Trade Associations and Membership Organizations		
Association Of National Advertisers	Hudson Guild, Inc.	Republican State Leadership
At Ease USA	Human Rights Campaign Inc	Research Triangle
Atlantic Council Of The United States	Hustle Conference Llc	Resident Services Empowerment, Inc.
Banff Forum	Idaho Governor's Cup Scholarship	Riders Alliance Inc
Bay Area Council	Illinois Manufacturers Association	Rochester Area Chamber Of Commerce
Bellevue University	Independent Women's Forum	Salt Lake Chamber
Bipartisan Policy Center	Indiana Chamber Of Commerce, Inc.	San Diego Regional Chamber Of Comm
Black Leadership Pennsylvania	Information Technology And	San Jose Silicon Valley Chamber Of
Boulder Chamber Of Commerce	Information Technology Industry	San Mateo County Economic
Boys & Girls Clubs Of Durham	Institute For State Policy Leaders	Sayfie Media Llc
Brilliant Impact Group, Llc	Institute Of International	Scott Stiffler
Brookings Institution, The	Intelligence And National Security	Seattle Repertory Theatre
Brooklyn Chamber Of Commerce	Interactive Advertising Bureau,	SF Partnership
Business Council For International	International Chamber Of Commerce	Silicon Valley Leadership Group
Business Council Of Alabama Inc	International Student House Of	Silverado Policy Accelerator
Business Forward Inc	Internet Coalition Inc	Software & Information Industry

This system of governance is susceptible to **outside influences** such as funders, advisors, gate keepers, and stakeholders.

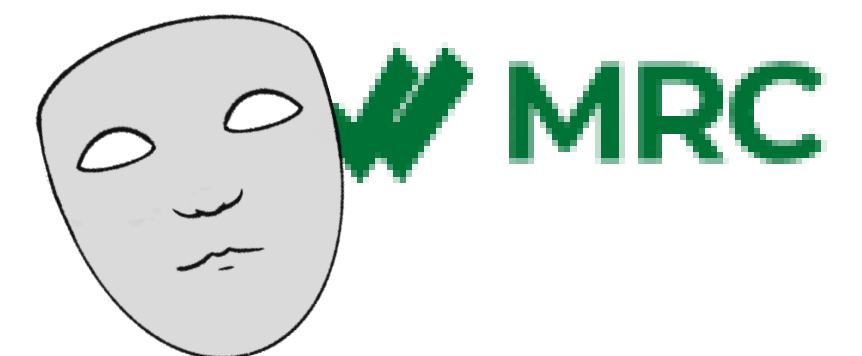
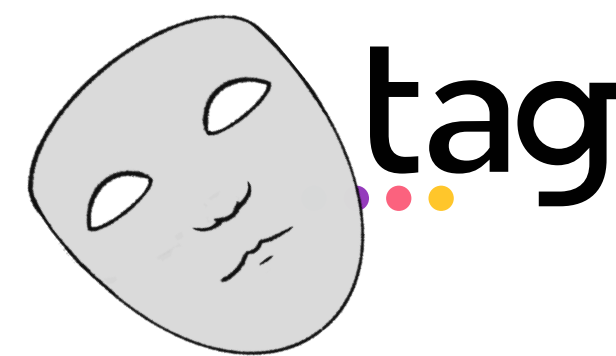
Each organization responsible for governance standards relies on external funding and sponsorships, as they do not operation solely on member fees. These funding sources create stakeholders, which creates a hidden layer of governance.



Trade associations are operated by a variety of organizations, obfuscating accountability.



Standard setting organizations provide certification services to regulate the industry.



Trade Association & SSO Funding Relationships



TRADE ASSOCIATIONS	Entity	Represents	Receives \$\$\$ from			
	WFA	Advertisers (Global)	G	∞		
	ANA	Advertisers (US)	G	∞	a	♫
	ISBA	Advertisers (UK)	G	∞	a	
	IAB	AdTech/Industry	G	∞	a	♫
	4As	Agencies	G	∞	a	♫
STANDARD SETTING ORGANIZATIONS	IAB Tech Lab	Standards Only	G	∞	a	♫
	TAG	Standards & Certification	G	∞	a	♫
	MRC	Standards & Certification	G	∞	a	

Pay-to-play and the consequences

If you are a company that does NOT get certification or become a member of these organizations, you generally aren't allowed to help craft industry standards.

One prime example of this is the IAB membership - if you don't get verified by TAG, you don't get IAB membership, period. To not have IAB membership is to be excluded from the IAB Tech Lab, which creates industry updates and technological updates.

Rough equivalency here is not getting a vote at the UN and getting relegated to observer status.



Source: IAB Press Release

Pay-to-play and the consequences

The ANA's Master Media Buying Services Template Agreement (V3, 2023) codifies the requirement for all agency vendors within the digital advertising supply chain to be:

- TAG Certified for Brand Safety and TAG Certified Against Fraud
- Accredited by MRC or agree to follow MRC metric accreditation guidelines

○○○	
1.	DEFINITIONS
	“Accredited” means MRC accredited for a specific metric (e.g., IVT, Viewability Standards, etc.), format (e.g., display or video), and environment (e.g., desktop, mobile app, CTV, etc.). ³³
2.7	Agency shall require that all Media Owners and Media Resellers are either Accredited for their specific billing and Outcome metrics, format, and environment or have, at minimum, contractually agreed to follow MRC accreditation guidelines for their specific billing and Outcome metrics, format, and environment. In the event a Media Owner or Media Reseller is not able or willing to comply with the foregoing, Agency shall notify Advertiser in writing and the Parties shall mutually agree
2.8	Agency will adopt and implement technology and methodologies (i.e., ad fraud tool(s)) to track and report to Advertiser accurate Media Placements using, where applicable, Accredited Vendors.
4.5	Agency is aware of the TAG Certified Against Fraud Guidelines (https://www.tagtoday.net/fraud) and will comply with those guidelines - including minimizing (and procuring that any of its proprietary trading desks minimize) the risk of IVT, when supplying the Services - in order to achieve and maintain the TAG Certified Against Fraud Seal. Agency will select Media Owners and Media Resellers and Programmatic Intermediaries that have achieved the TAG Certified Against Fraud Seal.
5.5	Agency is aware of the TAG Brand Safety Certified Guidelines (https://www.tagtoday.net/brand-safety#bsc.pdf) and will comply with the latest guidelines -including minimizing (and procuring that any of its proprietary trading desks minimize) the risk of ad misplacement, when supplying the Services - in order to achieve and maintain the TAG Brand Safety Certified Seal. Agency will select Media Owners, Media Resellers and Programmatic Intermediaries that have achieved the TAG Brand Safety Certified Seal.

Who **funds** each of the trade associations?



Each of the trade associations and standards bodies receive funding and sponsorships from the biggest players in AdTech.

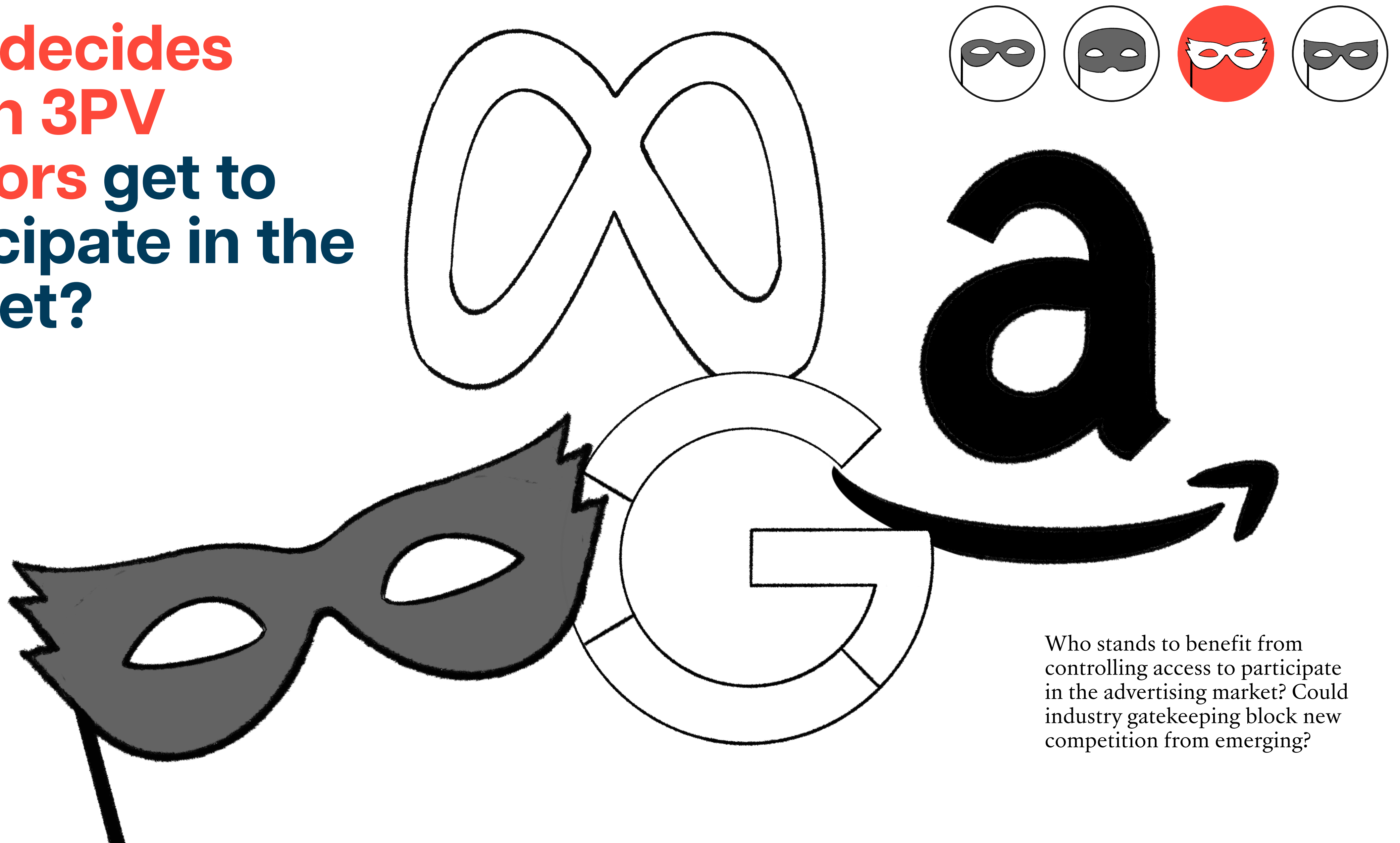
As financial stakeholders and sponsors for industry events, trade associations are susceptible to influence.

Who **pays the agencies** that sit on these working groups?



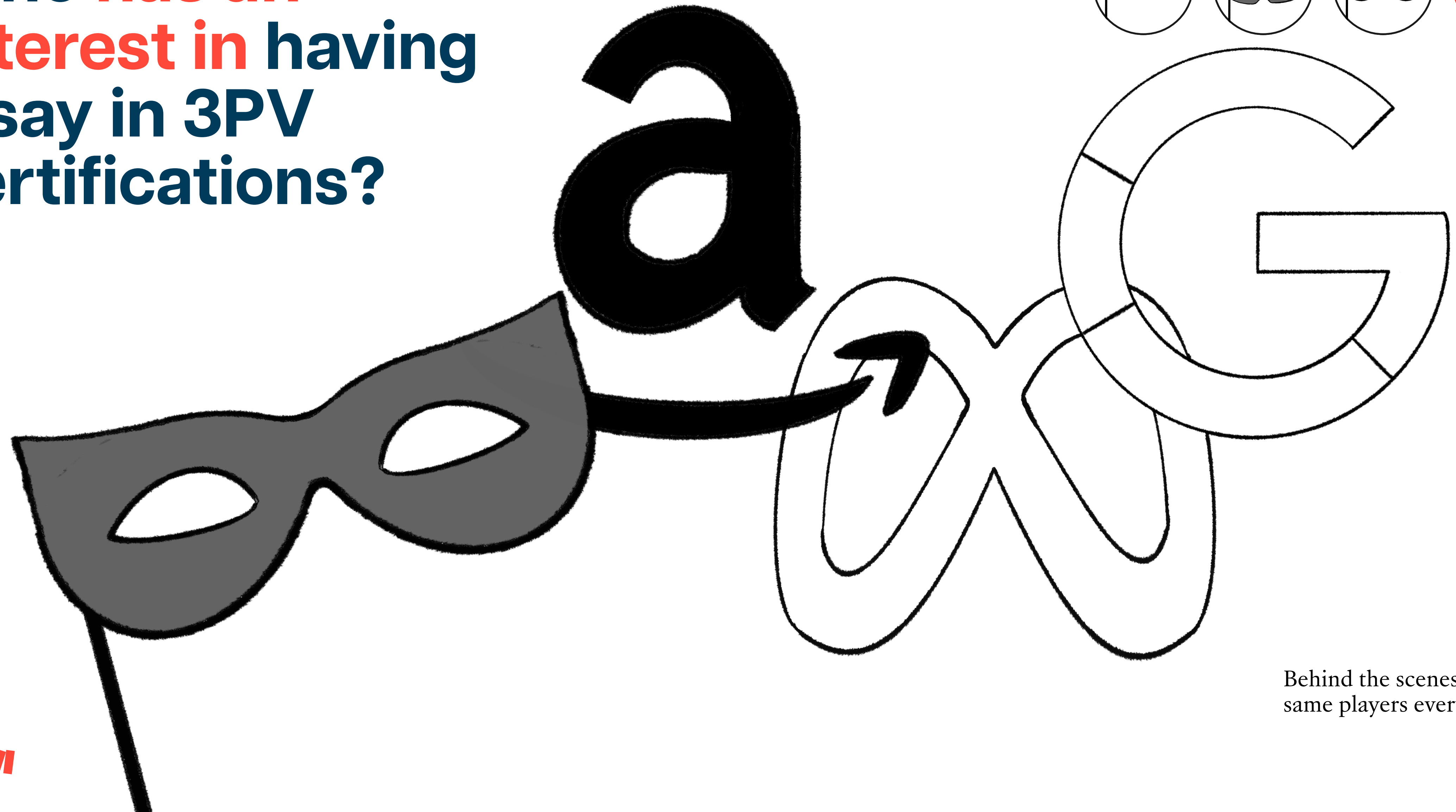
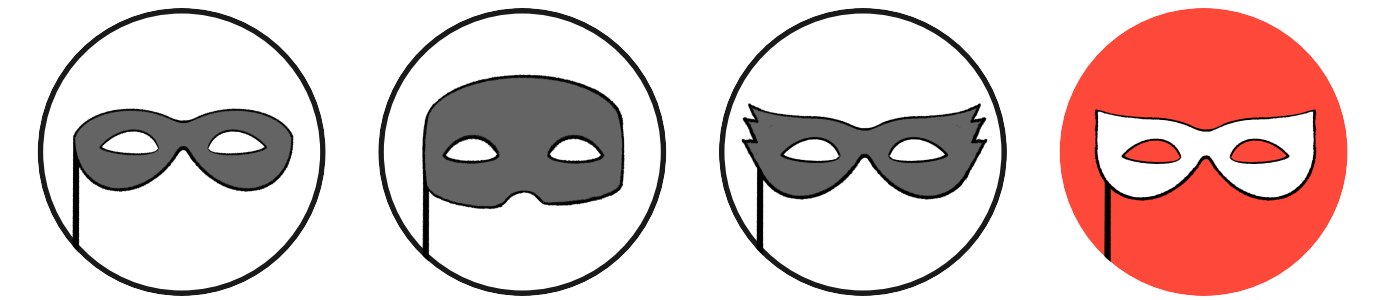
The trade bodies receive input from agencies in the process of defining certification criteria. Who pays those agencies, through principal trading and incentive deals?

**Who decides
which 3PV
vendors get to
participate in the
market?**



Who stands to benefit from controlling access to participate in the advertising market? Could industry gatekeeping block new competition from emerging?

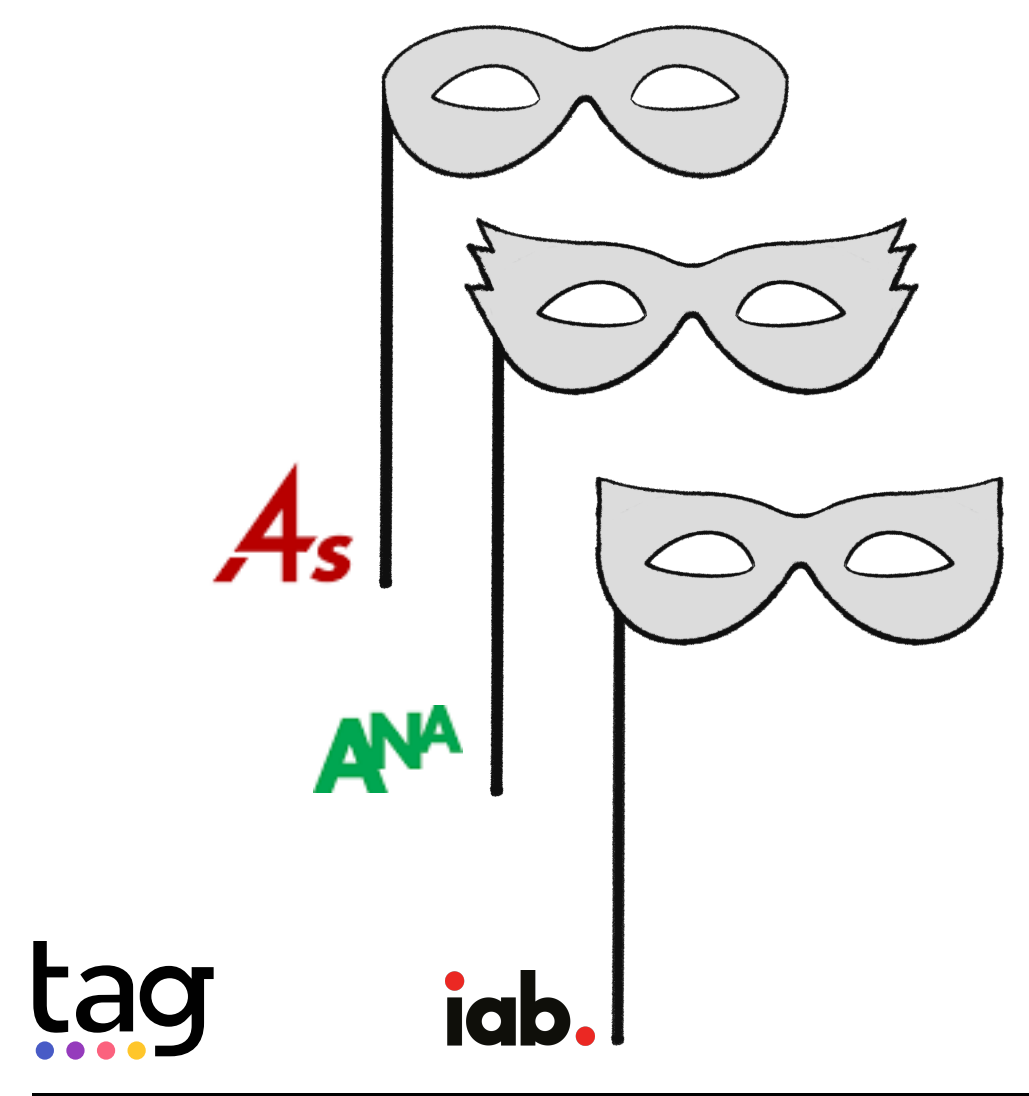
Who has an
interest in having
a say in 3PV
certifications?



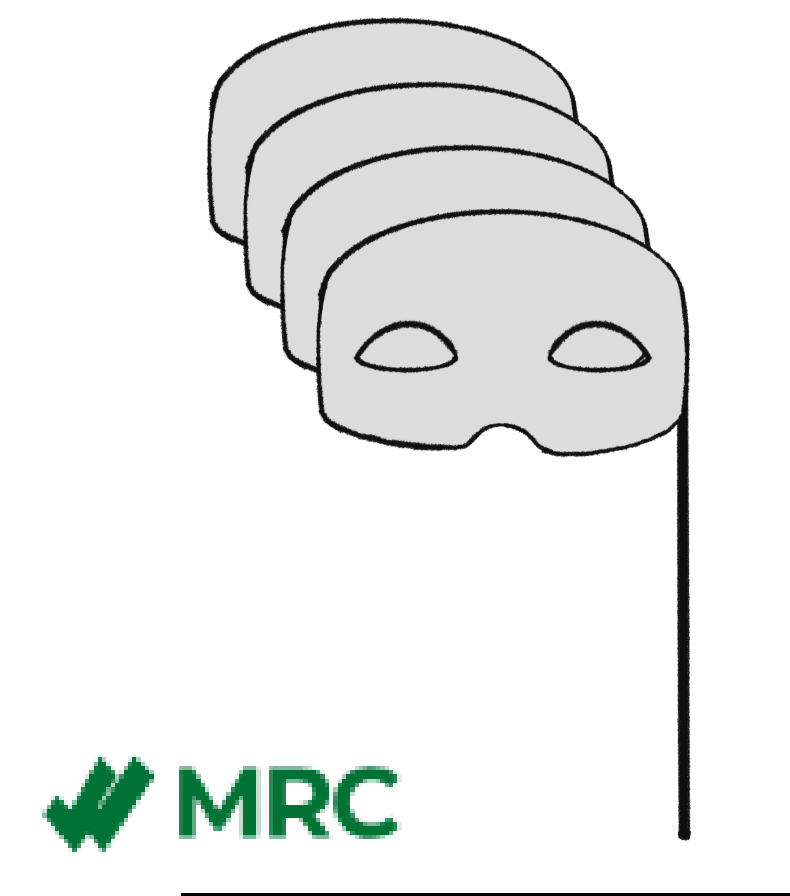
Behind the scenes it's the
same players every time.

Tech giants operate like a third informal layer of digital ad industry governance.

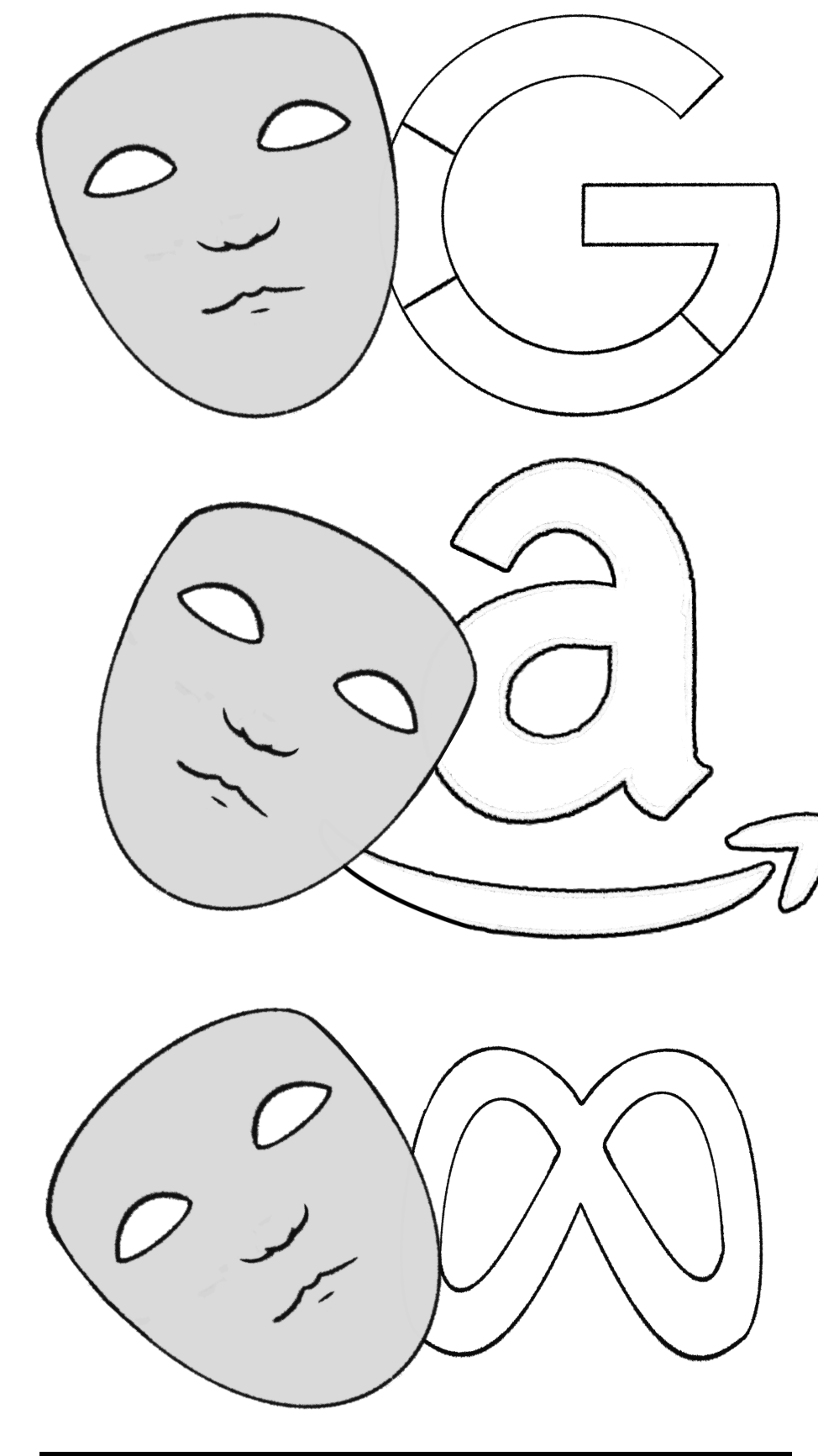
Digital ad industry standards bodies and trade associations are ultimately controlled by big tech interests. Tech giants operate as an obfuscated third administrative layer in the governance of the digital ad industry.



Trade associations provide certification services that purport to regulate the industry.



Trade associations are operated by a variety of businesses and organizations, obfuscating accountability.



Because of the multiple steps of separation, it's difficult to see directly who's calling the shots.

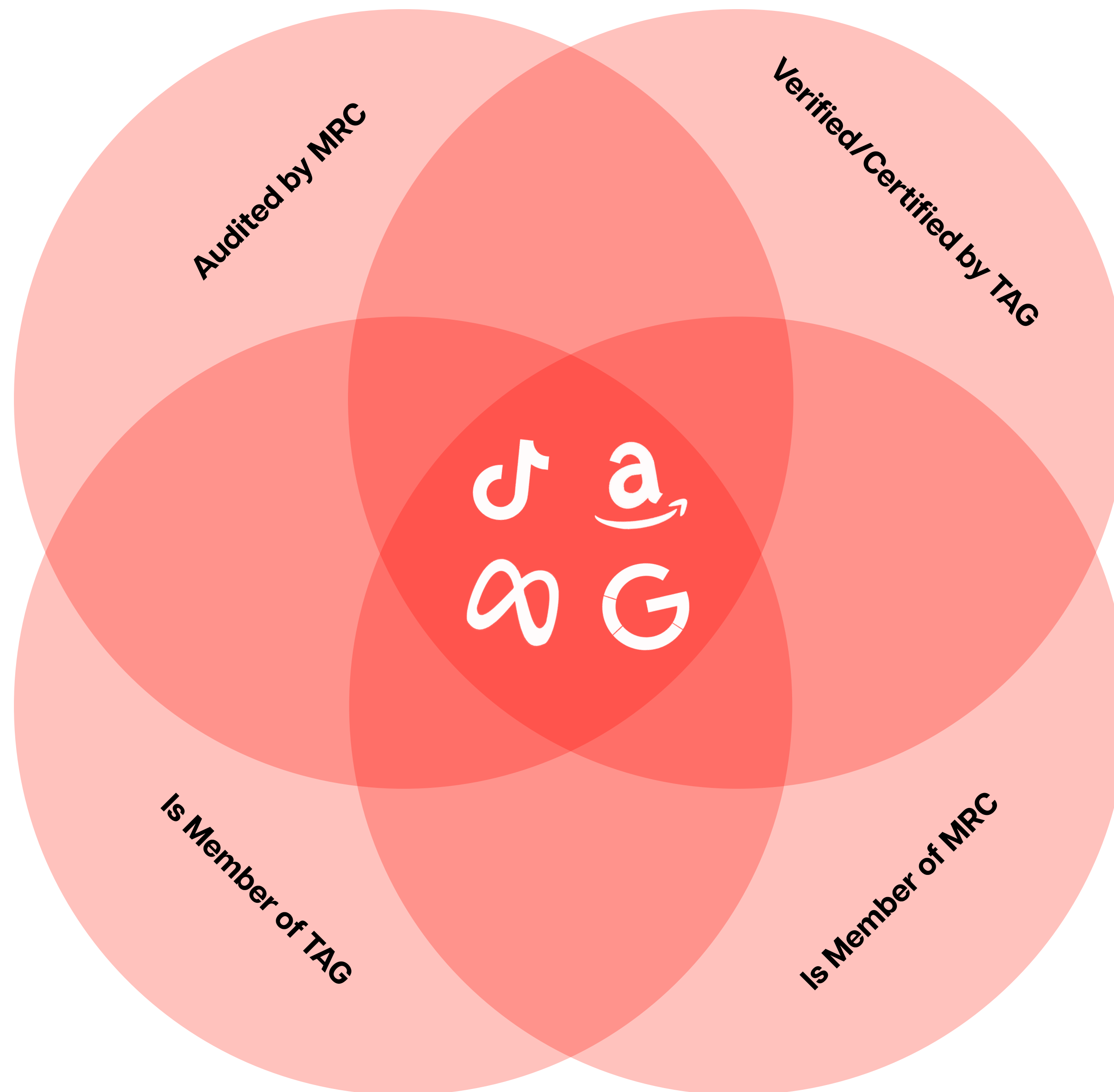
When we look at the system in detail we can see that it's the tech giants who are in ultimate control.

Trade Associations Audit Governance and AdTech Memberships

Note:

Membership fees and dues are not always public, but payments are made to trade associations as a prerequisite for either membership, auditing, or both. Both TAG certifications and MRC's "Accredited Service" are auditing programs. For this diagram, the following declarations apply:

- Trade associations known to require membership dues and publicly list the AdTech company as a member
- AdTech companies are listed as successfully TAG verified, certified or as an "Accredited Service" by MRC.



Who are your
trade associations
really working for?

Stop paying
the TAG tax.

