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A New Chapter for the Open Internet- Change is in the Air: A call to arms

April 24, 2025 by The Prebid Marketing Team (<https://prebid.org/author/asurdo/>)

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Digital ad spend in North America is expected to reach \$374 billion in 2025 (<https://www.statista.com/forecasts/273737/digital-advertising-spending-north-america>) and is projected to exceed half a trillion dollars by 2029.

At the same time, US District Court Judge Leonie Brinkema ruled this month that Google unlawfully monopolized (<https://www.nytimes.com/2025/04/17/technology/google-ad-tech-antitrust-ruling.html>) the digital advertising market by combining its publisher ad server and ad exchange products in ways that disadvantaged competition.

As Prebid Board Member Patrick McCann, SVP of Research at Raptive, has pointed out: *“Google Ad Manager’s monopolistic behavior is ongoing. They conceal the auction price from the publisher just long enough to put them on better footing than other exchanges and force a publisher to send their competitors’ bids to them.”* It is solving behavior like this, along with countless other actions, which Prebid has advocated for on behalf of our members with other governing bodies, such as the CMA, over the last few years.

This ruling also follows a previous judgment declaring Google a monopoly in search advertising combined with a recommended remedy to divest the browser business, which we will address in a following note.

Together, these rulings make it clear: systemic reform in digital advertising is overdue.

The Verdict: An Inflection Point for Digital Advertising

Such a high growth market demands open infrastructure, fair competition, and transparency—principles too often sidelined by monopolistic behavior.

The U.S. Department of Justice’s recent antitrust victory (<https://www.justice.gov/opa/pr/departments-justice-prevails-landmark-antitrust-case-against-google>) against Google marks more than a legal milestone; it signals a pivotal moment in the evolution of the digital advertising industry.

"This ruling acknowledges the prevalence of monopolistic practices and creates an opportunity for the industry to partner with regulators to craft responsible standards that foster innovation and growth across the industry."

notes Prebid Board Member Jordan Cauley, VP of Product Mediavine

This ruling represents a watershed moment. A moment where the Prebid community has an opportunity to come together and lead for the benefit of the entire digital ecosystem, enabling a rising tide to raise all boats.

Prebid is A Proven Path Forward: Fairness, Transparency and Built for the Open Web

The reality is simple: for the open web to succeed, it must remain truly open. Header bidding was created to break through the closed systems that restricted publisher flexibility and transparency, while increasing competition and revenue. It is the reason why hundreds of thousands of publishers leverage our JS technology across websites.

Instead of closing the loop, Prebid created a shared, open-source solution that promotes transparent interoperability, becoming the backbone of a vibrant, publisher-first ecosystem where innovation is shared, not siloed.

As Garrett McGrath, Chairman of Prebid.org, said in regards to the ad tech antitrust ruling, *"Prebid applauds this decision. It reinforces many of the reasons why Prebid exists, and why hundreds of thousands of publishers utilize Prebid's open-source technology every day. We look forward to a much more level playing field where all members of the ad tech industry have an equal chance to compete on their own merits."*

Prebid Board Member Ankur Srivastava, VP, Product Management at PubMatic echoes this point, stating; *"Prebid's open framework delivers the infrastructure needed to uphold the principles of a fair, transparent digital ecosystem – publisher control, transparency, and demand-source control."*

An Open Invitation: Collaboration Over Walled Gardens

These decisions, combined with a rapidly changing industry of evolving regulations and emerging technologies, we now face a critical inflection point and the way forward is not more consolidation but instead collaboration, in service of a wave of innovation freed from the constraints of monopolistic behavior.

Prebid's focus remains unchanged: building a fairer, more sustainable ecosystem through open standards, transparent governance, and shared innovation. We will continue to welcome all marketplace participants to build into Prebid and compete fairly on their merits, a request made several times to AdX over the years. As Prebid Board member Heather Carver, CRO for Freestar, said: *"We would welcome Google's participation in Prebid. Embracing open standards and transparent auction dynamics is critical to supporting publisher choice and a healthier programmatic ecosystem."*

While we realize the remedies and implications of these decisions will take years, several short-term opportunities exist for Google to compete more fairly and respect the marketplace's need for publisher transparency and control. Engineering solutions that can be made in months, not years.

As we navigate this transformative period, it's imperative for all stakeholders – publishers, advertisers, buyers and platforms alike, including Google – to come together and build a digital advertising ecosystem rooted in transparency, fairness, and innovation. Now is the time to re-imagine the role of the ad-server, the future of identity and interoperability across channels!

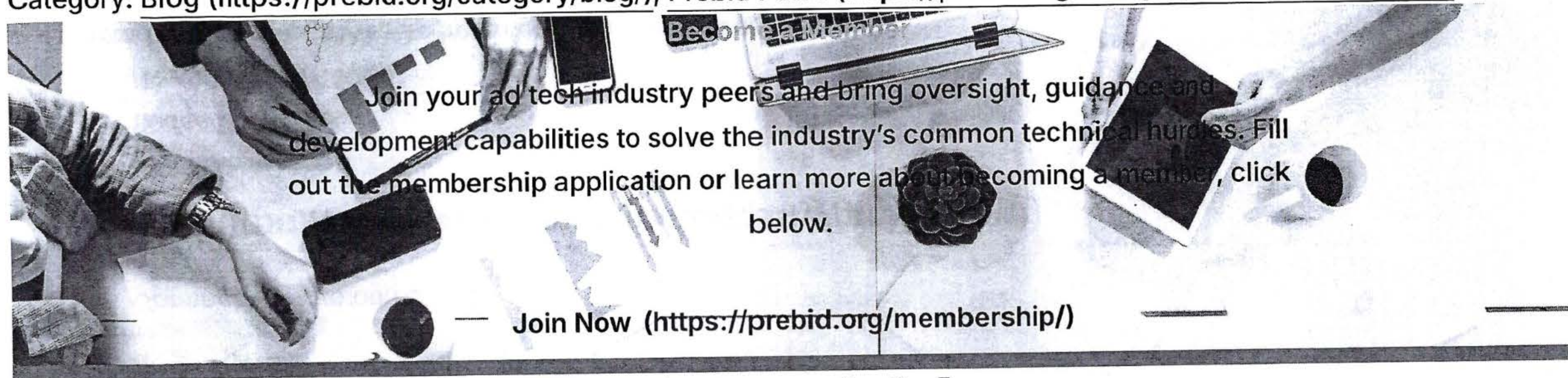
Looking ahead, one thing is clear: the open web can't be maintained by a dominant player. It takes a community. Prebid is ready to lead but we can't do it alone as it will require the input and contributions of all marketplace participants, especially as any changes will have an impact that will cascade well beyond programmatic media.

In short, let's write the future of the open web together.

Mike Racic

President of Prebid.org

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A black and white photograph showing a top-down view of a meeting table. Several hands are visible, interacting with documents, a smartphone, and a tablet. The scene suggests a collaborative work environment.

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276 5th Avenue

Suite 704, #756

New York, NY 10001

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