

Digital sovereignty:

Regaining control in a fragmented
advertising landscape

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Agenda

- ◎ **What is digital sovereignty?**
- ◎ **The closed ecosystem trap**
- ◎ **The European open alternative**
- ◎ **Fragmentation is the problem, identity is the solution**
- ◎ **Omnichannel in a sovereign ecosystem**
- ◎ **Key take aways & what to do next**

What is Digital Sovereignty?

Why has it become a business priority?

01

Sovereignty is no longer just territorial

Digital sovereignty is the ability of a brand, organization, or state to control its own data, infrastructure, and technology without external dependencies that compromise that freedom.



Advertising at a Crossroads

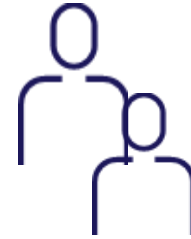
Digital advertising is undergoing a structural transformation driven by **fundamental shifts in technology, regulation, and consumer expectations.**

Why this became urgent?



Geo-political shocks

Russia's invasion of Ukraine (2022) exposed digital infrastructure vulnerabilities



EU-US tensions

Trump administration challenged GDPR, DSA & DMA as trade barriers.



Tech dependency

90%+ of global cloud controlled by AWS, Azure & Google.



Ad-tech fragmentation

Identity silos, cookies deprecation & walled garden dominance have eroded brand control

What Sovereignty Looks Like in Practice

**You set
the rules**

**You own
your data**

**You activate
on the open
internet**

**You see
where your
media spend
lands**

The closed ecosystem trap

How walled gardens capture brand control, data & budgets

02

Inside a walled garden, the brand is a guest, not the owner.

50%+

of global digital
ad spend: 5 Big Tech
players

90%

of global cloud:
AWS, Azure, Google

What brands lose in a walled garden:

- Brand ownership
- The „off switch“
- Limited transparency
- Interoperability
- Restricted budget control

Three models. Three visions of digital power:



Corporate Dominance

- Self-regulation model
- Big tech sets the rule
- Data = corporate asset
- Risk for brands: vendors lock in & policy shifts



State Dominance

- Force data localisation
- Government oversight of all platforms
- Internet sovereignty – state tool
- Risk for brands: limited access & opacity



Rights & Regulations

- GDPR, DMA, DSA, AI Act
- Human-centred approach
- Brands own their data
- Opportunity: level playing field via regulation

The European Open Alternative

03

Privacy-first, transparent, open and it works
at scale

Europe did not just regulate; it set the global standard.

GDPR- 2018

Personal data protection & user consent.

DMA - 2022

Forces interoperability & bans anti-competitive behaviours by Big Tech.

DSA -2022

Recommends transparency in algorithms and advertising targeting

AI Act: 2024

World's first comprehensive AI governance law.

European innovation in action

Telco powered identity

UTIQ

Telco network signals that create addressable audiences without relying on third-party cookies

Linear TV reimaged

CTV

CSOB Bank bridges traditional tv with programmatic audience targeting.

Audio beyond screens

Spotify

Reach your audience on the road with programmatic **in-car audio**

Real world reach

DOOH

DOOH Innovations
Reaching consumer on the move

Fragmentation is the problem, identity is the solution

04

Reconnecting users across a complex digital
ecosystem

40%+
of traffic we see
today is already
cookieless

A Chrome/cookie-only
strategy means you're
at best reaching 60% of
your target audience

The identity ecosystem is broken.

50%

Of users unreachable
in cookieless environments

100+

Unique identifiers
in the ecosystem

2,7x

IDs per bid request
(average)

Impact on market

- ⦿ Uncontrolled frequency
- ⦿ Ineffective targeting
- ⦿ Incomplete measurement
- ⦿ Budget waste

Impact on users

- ⦿ Fragmented experiences
- ⦿ Messages are no longer relevant
- ⦿ Eroding trust
- ⦿ No coherent brand journey across devices and channels

ID5

netID

neustar

nova⁺tiq

utiq

Publishers IDs

Schibsted SEZUAM.CZ s a n o m a

LiveRamp

justID

first-id

LOTAME PANORAMA ID

Prebid



ID FUSION
87%+ coverage

The most powerful platform for addressability in a fragmented world

ID Fusion currently supports 45+ IDs to drive **performance** and **reach** on third-party cookies, first-party IDs, in cookieless and beyond.

Omnichannel in a Sovereign Ecosystem

06

Unified identity is the foundation of real cross-channel strategy

You need to be as omnichannel as your audience is



Morning



Work



Gym



Car



Shop



Night

Omnichannel is part of every immersive moment of your day

Unified identity makes omnichannel real, not just aspirational.

- ◎ Recognizing the user across multiple channels.
- ◎ Adapting messages to context and moment.
- ◎ Controlling frequency globally, for each channel.
- ◎ Measuring the real impact of the entire experience.

- Full programmatic, all formats
- Brand data 100% owned

Display & Video

- Advanced targeting
- Incremental measurement

CTV

- Streaming & podcast
- First-party ID in cookieless

Audio

- 15+ markets

DOOH

Why should you react now?

Marketers with a high reliance on US tech giants are facing concrete risks related to their tech choices:

Increasing financial cost of Tech Giants

Major data & privacy risks

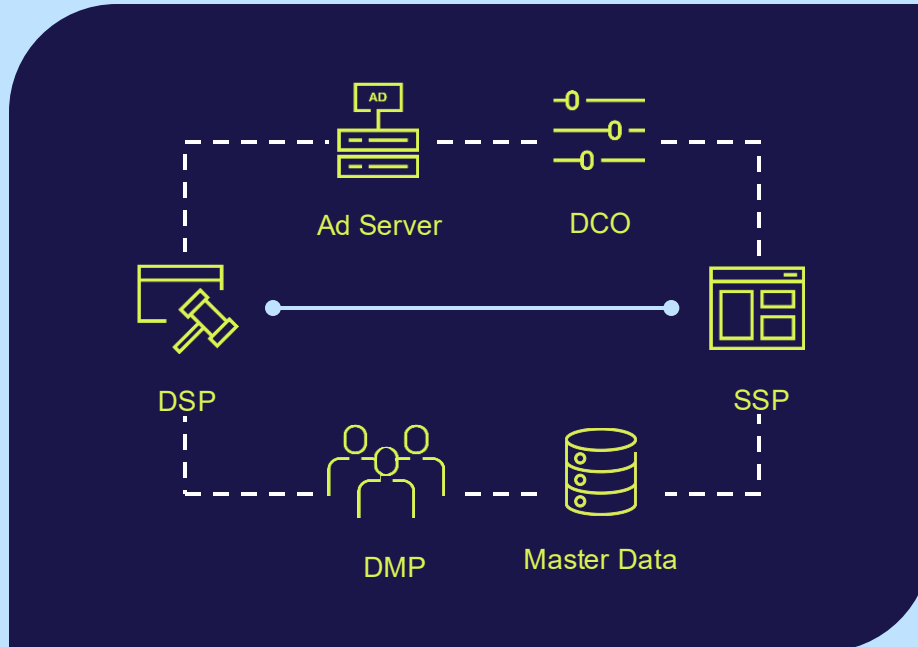
Reliance on unpredictable & opaque tech strategies

Take back control now.

Building your technological independence will help you to:

- Minimize your short-term risks
- Ensure long-term benefits

Adform is your EU-based adtech



to build your advertising
sovereignty

European Data protection

European servers mean European data stays in Europe.

Controlled tech costs

Get more working media, less tech tax, already now with Adform.

Responsible partner

We're fully committed to providing you total control over your data.

Privacy-by-design

Our solutions are committed to ensuring compliance with applicable privacy regulations.

Futureproof strategy

The future of online addressability is multi-ID and no single ID will take over or prevail.

Neutral and agnostic

From PwC, to Gartner, to MRC accredited metrics and Adform Log-Level data - we give you the power of peace of mind.

Case Study

Vodafone Germany Executes a Game-Changing Full-Funnel Campaign with Adform's Connected TV Inventory and ID Fusion Solution

Results: How did Vodafone seamlessly blend branding with performance marketing? With our omnichannel platform and ID Fusion Solution, the telecom giant could ensure customers were reached at every stage of their buying journey, using multiple channels as touch points. After an initial prospecting campaign on the big screen with Connected TV (CTV), Vodafone followed up with a retargeting display and video campaign leading to game-changing results!

100%

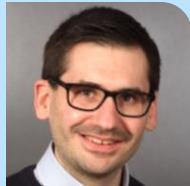
Delivery of prospecting and retargeting campaign activities, reaching the whole user pool

100%

Fulfillment of Cost-per-order (CPO) goal in retargeting campaign

80%

Viewability in retargeting campaign



“Thanks to Adform's solutions, we were able to combine CTV and retargeting and add a performance-orientated component to the campaign. The retargeting significantly increased views, clicks and conversions, so that the campaign also achieved very good results in the lower funnel.”

Benedikt Herrgoss
Online Marketing Manager, Vodafone Germany.



“With CTV retargeting via Adform, we now have the opportunity to increasingly integrate CTV into our full-funnel strategy and to ensure an effective, consistent, and above all, efficient approach to CTV viewers across various platforms and devices.”

Ines Deinert
Digital Marketing Manager, Vodafone Germany.



Partnered with
vodafone

Key takeaways & what to do next 07

Your strategic action agenda



Key Takeaways:

Control is the New Competitive Advantage

Regaining control over data, activation, and measurement is essential in a fragmented ecosystem.

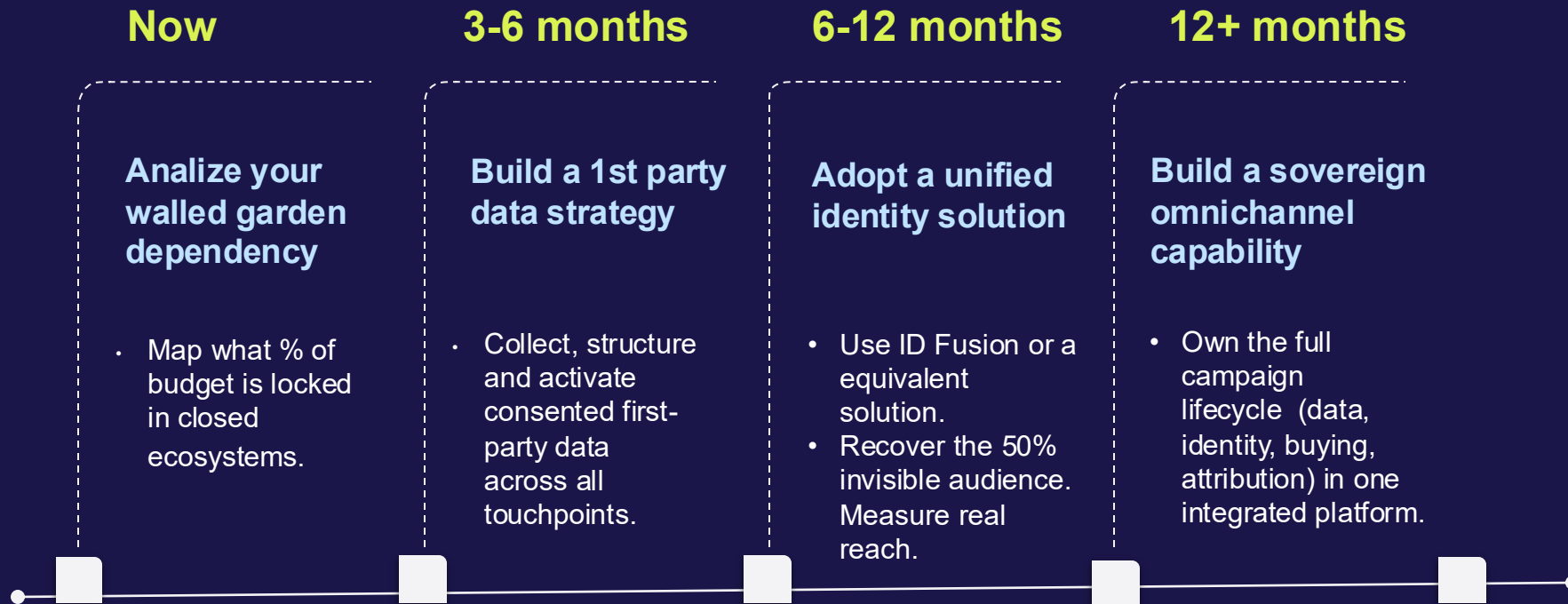
Addressability is the Foundation of Modern Marketing

Without the ability to recognize and connect users, performance and measurement break down.

Omnichannel Without Identity Limits Its Potential

True impact comes from understanding and activating users across channels, not just being present.

What does your brand do next



*The brands that control their data today
will own the consumer relationship tomorrow.*

Digital sovereignty is not just a buzzword; it represents a fundamental change and is likely to be one of the most important strategic decisions of the next decade.

Thank you!

adform

Change the game

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