

Review of the Positioning Document (TheSoul – Offer 1.1)

The review included input from members of the GTM Committee, as well as feedback raised by several hosts during discussions of the document.

General Feedback

The Committee reviewed the Gonka [positioning document](#). Overall, we see a number of strong elements in the current version: the visual and communication aspects are well developed, several meaningful differentiators of Gonka are clearly identified — including verifiable compute and the absence of a single point of control — and the document contains useful work on different audience segments.

At the same time, we believe the document would benefit from further development. The main concern is that the visual and communication layers are currently more developed than the product and research layers. The original proposal included an in-depth analysis of the product, technology, and competitive landscape, but in the current version it is not always clear what evidence or methodology supports the selection of competitors, conclusions about the audiences, and some of the positioning choices.

There are also several more specific questions: why particular competitors were selected, how directly comparable some of them are to Gonka, where their key claims come from, and how accurately those claims reflect the current state of the respective projects. We would also suggest connecting the personas more closely to real users, their pain points, decision criteria, and the capabilities Gonka can offer them.

In several areas, a clearer source of truth would also be helpful. Product and technology claims, as well as important competitor data, should ideally reference documentation or other primary sources and clearly distinguish between verified facts, claims made by the projects themselves, and research hypotheses. This is particularly important because the document may later be used by other contractors, who should be able to quickly verify the key statements.

At the same time, we do not believe the overall positioning direction is fundamentally wrong, nor do we suggest rebuilding everything from scratch. Below are specific slide-by-slide comments that, in our view, could make the document stronger and more convincing.

We have also included several usability comments, as the document may later be shared with other contractors and should therefore be practical and easy to work with.

Questions / Suggestions on the Gonka_Positioning Document

4–16 – Competitors

4.1 It would be helpful to clarify why particular projects were included in the competitor set, especially Filecoin. The current version does not explain the methodology or criteria used for the selection, and supporting sources are not provided.

4.2 For the key competitors, it would be useful to look not only at their messaging and visual identity, but also at their actual users: why they choose the product, what keeps them there, and what they are dissatisfied with. These pain points may reveal areas where Gonka has room to differentiate.

4.3 It is currently unclear how the core claim for each project was identified. It would be useful to provide the source of each claim and assess how closely it reflects the project's current product and market position.

4.4 The audience marked as #PRIMARY appears to consist mainly of active inference users, and in this context Filecoin seems less directly comparable. If investors in DePIN infrastructure are also considered a target audience, the comparison may be more relevant, but this audience is not currently represented in the audience framework. In that case, it may be worth adding and developing this segment separately.

4.5 For Bittensor, it would also be useful to look at the subnet level, since individual subnets have their own tokens and are traded separately.

18 – All Competitors

18.1 The “open space” idea is interesting, but it is currently described only from the perspective of GPU owners. It would be useful to distinguish between the two main audiences: what matters to hosts and what matters to inference buyers.

19 – Objective

19.1 The objective could benefit from greater specificity. In its current form, it reads more like a manifesto or long-term ambition. It would be useful to add something measurable so that it is clearer how we would determine whether the objective has been achieved.

19.2 There appears to be some tension within the slide: it first refers to having the largest available compute capacity, while later stating that Gonka is “not the largest network.” The roadmap already includes specific targets, so one option would be to use one of them as an intermediate objective.

20 – Brand Direction: Own the Compute Layer

20.1 The key point around verifiability gets somewhat lost within the paragraph and could be given greater prominence.

22 – Comparison Matrix

22.1 The document would benefit from a more product-focused comparison of competitors: what they actually offer, what their advantages are based on, and where Gonka has objective differences. This probably does not need to be added to the existing table and could instead be presented on a separate slide.

24 – Brand Direction Summary

24.1 “Nobody holds the switch” may feel somewhat negative in construction. “Decentralized AI accessible to everyone” is one possible alternative suggested by a Committee member. This is optional.

24.2 Optional comment on the archetype: at this stage, Ruler may not be the most natural fit for Gonka. Relative to an established AI company such as OpenAI, Gonka may currently be closer to a Challenger archetype. Challenger + Explorer could potentially reflect the project’s current position more accurately.

25 – Value Proposition & Purpose Framework

25.1 The headline promise, “Your compute does real work. Every time,” may deserve further validation. It is not clear that the productive use of compute is important enough in the decision-making process to serve as the main brand promise, or that this audience segment is large enough to build the primary promise around it.

It may be worth placing greater emphasis on the value delivered to the user: for example, equal and open access to models. The number of people using inference could potentially be significantly larger than the number providing compute, so the main promise may need to focus more on what matters to them rather than primarily on hosts or investors.

The table already expresses this idea well: “Open inference without a gatekeeper, priced by a market rather than a provider, and a network that can show what was actually served.”

25.2 On the Value Proposition for Developers: why would a developer choose Gonka over AWS or io.net? “Access to open models through a standard API” is useful, but on its own is not a strong differentiator because many providers offer similar access.

Potential differentiators may include the fact that access cannot be arbitrarily restricted, limits cannot be unilaterally reduced, the requested model cannot simply be substituted without verification, and pricing may also be more competitive.

25.3 On the Value Proposition for Hosts: “Why would a GPU operator choose Gonka over mining or renting to AWS?” may be worth reconsidering, as the comparison does not fully reflect the actual options available to an independent GPU operator. A host cannot simply rent their capacity directly to AWS.

A more relevant promise could focus on the ability to earn without having to solve many of the problems associated with centralized channels: going through KYC, finding customers, negotiating individual contracts, or maintaining significant legal and sales infrastructure.

25.4 On the Core Differentiator: the underlying idea is described reasonably well, but the text is too long and focuses more on the technical implementation than on the essential differentiator.

There is also an important technical nuance: Sprint does not verify individual inference requests; it verifies the availability of compute. Inference results are subject to a separate statistical verification mechanism, for which there does not currently appear to be a dedicated term. This mechanism can result in the loss of an epoch reward if missed or incorrect inferences exceed the relevant threshold.

One possible direction would be to describe the differentiator more simply: reducing the need for trust through cryptography and decentralization; resistance to censorship and arbitrary access restrictions because there is no centralized operator making those decisions; and the ability to verify that the requested model was actually used rather than relying solely on the provider's claim.

25.5 Usability comment: the text in the table cells could be made larger and easier to read.

26 – Brand Values

26.1 It may be worth making some of the statements slightly less categorical. More measured and precise language may work better for the positioning, particularly where the wording refers to specific protocol mechanics.

27 – Brand Positioning Statement

27.1 The same comment regarding the Core Differentiator as in section 25.4 applies here.

28 – GNK

28.1 The slide states: “GNK is how the network pays for compute, decides who governs, and funds what it gives away.”

This should be adjusted to reflect the actual governance mechanics. GNK itself is not used as voting weight. Voting power is determined by the hosts' current compute capacity.

30 – Persona List

30.1 It would be useful to define more precisely what is meant by a “host.” This may include both a GPU owner and a longer-term investor who rents anything from a single smaller GPU to a large amount of high-end capacity. Both groups participate as hosts, but their motivations may differ.

For positioning purposes, it is important to clarify how this term is being used.

30.2 It may be worth giving greater attention to investor profiles. The GPU host/investor persona could place more emphasis on hosts while retaining the nuance that they are also, in many cases, investors.

It may also be useful to add a profile of a larger investor, for example someone using a Ledger, particularly in the context of a potential major collaboration. Another useful profile could be a retail but long-term investor who is not primarily focused on pump-and-dump dynamics and instead accumulates through DCA over a longer period.

30.3 Another audience hypothesis that may be worth validating is a “CoinMarketCap-type” investor: someone who actively searches for relatively unknown projects and may invest approximately \$200–1,000 with the expectation of identifying an early-stage opportunity. This pattern is relatively common in crypto communities.

There has also recently been an example of a previously unknown US-based wallet purchasing approximately \$150,000 worth of GNK. The underlying psychology may be similar: identifying a potential “gem” or an early-stage project with significant upside. This should, however, be treated as a hypothesis and validated before being incorporated into the core audience model.

30.4 It would be useful to study existing and potential Gonka users in greater depth in the context of the roadmap: identify the main segments, understand their pain points, and determine which current or future Gonka capabilities could address those needs.

30.5 The personas are difficult to read in the exported PDF and should ideally be split across several slides. If the document is shared with other contractors, it needs to remain practical for them to work with. The external link is useful, but there should also be a readable version within the document itself.

31 – How Did People First Hear About It / What Did They Search For?

31.1 It would be useful to distinguish more clearly between observed facts and assumptions. Media coverage can show how Gonka is described externally, but this alone does not provide enough evidence to conclude how people first discovered the project or what they searched for. These conclusions would ideally be supported by analytics or audience data.

31.2 Under “Token/exchange discovery – via CoinMarketCap listings and mining/trading platforms like HeX,” we suggest removing HeX as an example, since it was created specifically for Gonka and therefore does not have an audience unfamiliar with Gonka that could discover the project through it.

33 – How Redditors Heard About Gonka AI

33.1 At this stage, the material appears to show examples of where Gonka has been mentioned on Reddit rather than research into how users actually discovered the project. It would be useful to include the sample size, sources, and some indication of how representative these patterns are.

33.2 There also appears to be a potential issue with the conclusion because the analysis considers the posts themselves without accounting for their actual reach. It would be useful to include at least one example of a meaningful standalone Gonka mention and, where available, data on its reach or engagement.

35 – Primary Use Cases for Gonka AI

35.1 For these to function as Primary Use Cases, the section would benefit from more concrete usage scenarios for developers and hosts, as well as an indication of which of them have already been validated through actual usage.

At the moment, several of the points appear to describe protocol mechanics or protocol development rather than use cases in the conventional product sense.