

OpenAI Is a Self-Tightening Knot

Heavy compute dependency erodes autonomy. Open-weight models compress margins. Every win deepens the trap — unless the structure changes now.

Dissolve the Structure

Mission-locked charter with machine-enforced safety gates — not board debates

Separate Capital from Compute

Two new capital partners with no compute supply role — diversify now

Shift Revenue Model

Outcome-based enterprise contracts replace token pricing as primary revenue

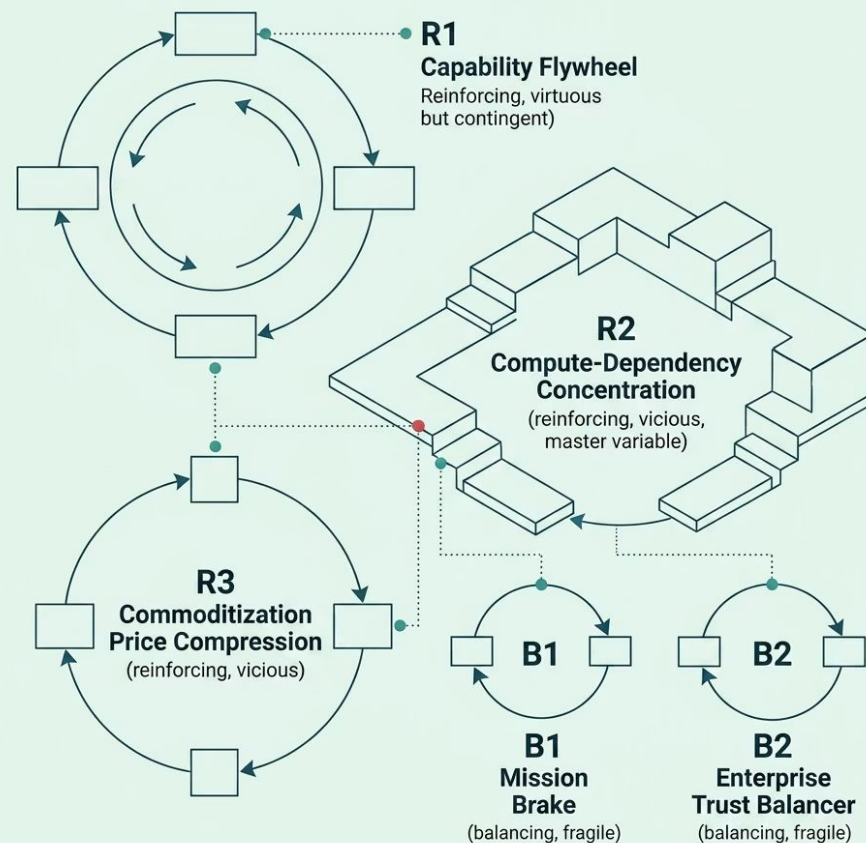
Three Focused Units

Capability Foundry · Trust & Deployment Engine · Capital & Compute Treasury

Source: Percision Research | Slide 1/2 | Public example — Percision



Five Loops. One Master Variable.



Decision deadline: Board must choose by end of Q4 2026 — sequence structural moves or remain fused. We recommend the former.

R2 — The Master Variable

Compute dependency is the only loop that *removes the ability to act on all others*. Estimated 60–70% of strategic constraint.

The Idealized Fix

Charter-lock → capital separation → compute diversification. Dissolves R2, converts B2 from fragile brake into reinforcing flywheel.

Cost of Inaction

Strategic autonomy erodes quietly. The partner becomes de-facto roadmap governor — even if models stay strong.



PERCISION RESEARCH · 2026-08-04

OpenAI Systems Redesign

Design & Transformation Report · Idealized Architecture (Ackoff
Interactive Planning)

5-Year Planning Horizon · 2026–2031

Source: Percision Research | Slide 1/18 | Public example — Percision · EBITDA: Earnings
Before Interest, Taxes, Depreciation & Amortisation | ROIC: Return on Invested Capital

What This Report Covers

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The Ideal Company

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Direct Answers · Decision-Forcing Close

The Trusted Intelligence Layer

Core Purpose

A governance-anchored intelligence layer embedded into enterprises' highest-stakes workflows — selling **verified business outcomes**, not tokens — while owning enough compute to preserve strategic roadmap autonomy.

Value Proposition

Auditable, outcome-priced intelligence inside regulated and mission-critical processes. The product is a **verified business result** backed by machine-enforced governance — not raw model access.

What It IS

Single mission-locked for-profit with three coupled units. Safety encoded as non-negotiable release-gates — not a separate braking board.

Competitive Edge

Competes on enterprise trust and measurable outcomes — not token price or raw benchmark leadership.

So What (Q2)

Dissolves the governance-commercial contradiction by making **trust the thing being sold**.

Three Coupled Units · One Charter

Capability Foundry

Frontier + efficient-model R&D and compute-stack ownership. Owns model roadmap and make-vs-buy compute decisions.

Trust & Deployment Engine

Enterprise-facing unit packaging models into governed, audited, outcome-priced workflow products. Holds veto on any release compromising auditability.

Capital & Compute Treasury

Manages capital formation and compute portfolio as one balance-sheet problem. Deliberately separates capital sources from compute suppliers.

Decision Flows

Mission-locked charter (supermajority + independent safety fiduciaries). Quarterly falsifiable bets with pre-committed kill criteria. Shared capability half-life monitor feeds all three units.

❏ So What (Q4): Encoding mission as release-gates removes the flywheel-vs-brake stakeholder war — they become the same mechanism.

Revenue Architecture · Ranked by Strategic Priority

Revenue Stream	Description	Target Mix	Margin Profile
Outcome-priced Enterprise	Charge for measured business results, not tokens	Majority	Highest
Governed Private Deployment	Monetises data governance and single-vendor dependence anxieties	Premium tier	High
Consumer Subscription	Brand and data-feed engine — deliberately smaller	Supportive	Moderate
Per-token API	Developer on-ramp and market-data sensor only; priced to break even	Minimal	Break-even

70–75%

Target Blended Gross Margin (2031)

vs. plausible 40–60% today on high inference COGS

20–30%

Target EBITDA at Steady State

Post-investment phase · SaaS top-quartile analogy

Source: Percision Research | Slide 5/18 | Public example — Percision · EBITDA: Earnings Before Interest, Taxes, Depreciation & Amortisation · COGS: Cost of Goods Sold · API: Application Programming Interface



SECTION 4 · VALUE CREATION ENGINE

Three Compounding Flywheels



Trust Data-Gravity Flywheel

Governed deployments deepen integration, accumulate proprietary workflow data, raise switching costs, improve outcomes, and justify higher outcome-based capture.



Efficient-Model Cost Flywheel

Routing commodity tasks to small models lowers serving COGS faster than open weights — protecting margin without price competition.



Compute-Autonomy Flywheel

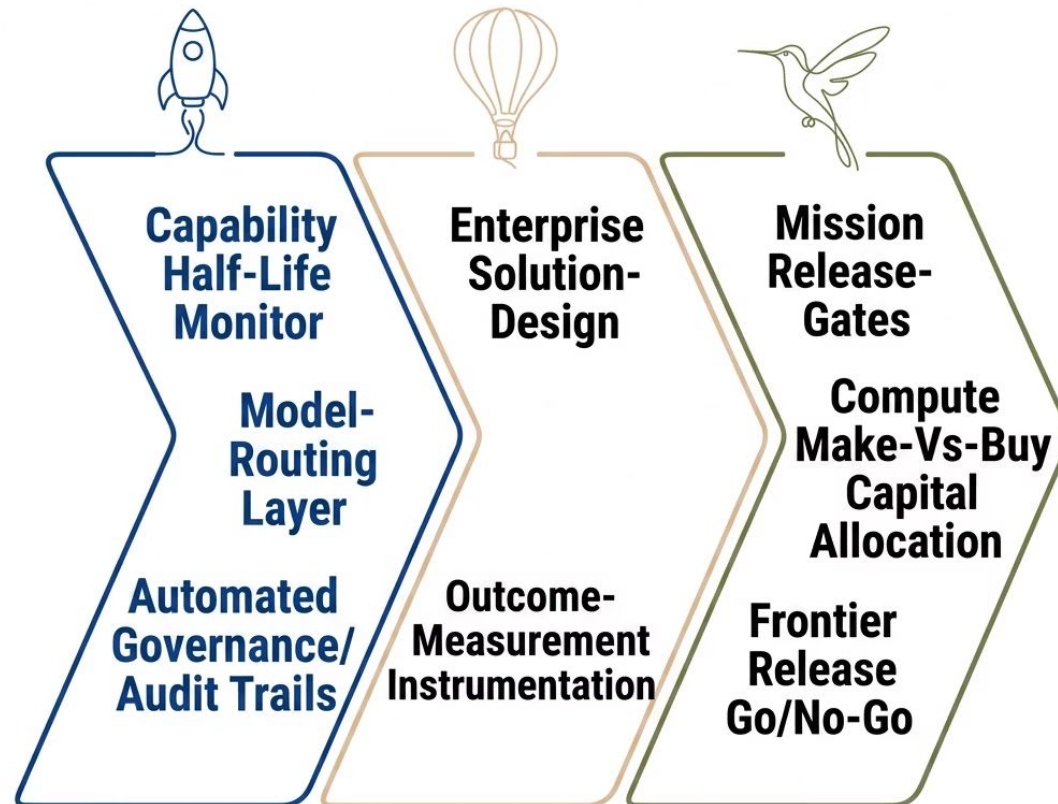
Owned base-load lowers marginal cost and removes counterparty leverage. Savings and autonomy compound over time.



So What (Q2): Converts trust from a defensive brake into an offensive compounding asset — the last non-commoditised pricing source.

Source: Percision Research | Slide 6/18 | Public example — Percision · COGS: Cost of Goods Sold

Where AI Decides · Where Humans Must



Feasibility

All three core systems are buildable within **3 years** from existing model-routing, observability, and evaluation tooling.

So What (Q3)

These capabilities directly harden the highest-threat loop by internalising the master variable of **capability depreciation rate**.

Mission as Mechanism — Not Brake

Rewarded Behaviours

Shipping verified customer outcomes and lowering serving cost-per-outcome — **not** tokens served or raw benchmark wins.

Alignment Mechanisms

Individual incentives tied to enterprise-mix growth and outcome-delivery quality. Mission encoded as hard release-gates and audit requirements inside a single charter — supermajority plus independent safety fiduciaries.

So What (Q4)

This design removes the internal stakeholder conflict where commercial aggressiveness and mission fight for the same chassis — because the mission is **monetised rather than suppressed**.



Deliberate Partnership Architecture



Flexible Compute

2–3+ non-exclusive training compute suppliers under a hard concentration cap. Never majority from one partner.



Vertical Integrators

Systems-integration partners for regulated-industry last-mile depth — where Percision-designed units cannot scale alone.



Lighthouse Accounts

2–3 signed outcome-based enterprise pilots that seed the Trust Data-Gravity Flywheel with real proprietary workflow data.

Incumbent Strategic Partner

Managed, not severed. Continued large-but-capped share plus preferred status on flexible burst compute. Diversify at the margin first to avoid contractual friction.



So What (Q2): Deliberate separation of capital and compute counterparties directly dissolves the highest-threat dependency loop (R2).

What the Ideal Company Explicitly Does NOT Do

No Price Defence on Per-Token Volume

Priced to break even only — competing on token price accelerates margin compression into the tier open weights win.

No Single-Partner Compute Majority

Hard concentration cap on any single supplier. Capital and compute must never come from the same counterparty.

No Separate Governance Board

No structure where mission enforcement is a separate board that can be captured or destabilised. Mission is encoded in charter as machine-enforced gates.

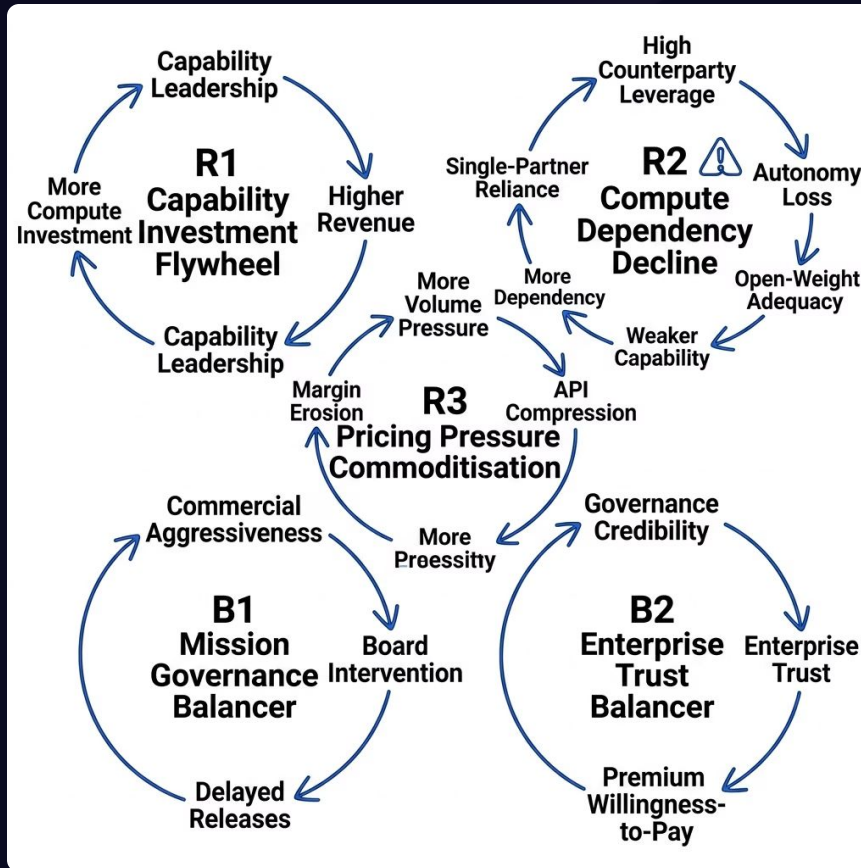
No Consumer Frontier Race-Chasing

Consumer remains brand and data engine only — not primary profit center. Feature racing dilutes enterprise trust positioning.

No Ungoverned Enterprise Customers

Serve only customers who can and will pay for governed, auditable deployment. Others are directed to the API on-ramp.

Five Core Causal Loops — R2 Is the Master Variable



R1 — Capability Flywheel

Positive but fragile. Compute availability drives 60–70% of outcome impact.

R2 — Compute Dependency

Highest-threat. Gates every other loop. Collapse triggers simultaneous talent, capital, and enterprise churn.

R3 — Pricing Pressure

Painful but survivable with trust moat intact. Revenue tied to token unit drives ~55% of margin pressure.

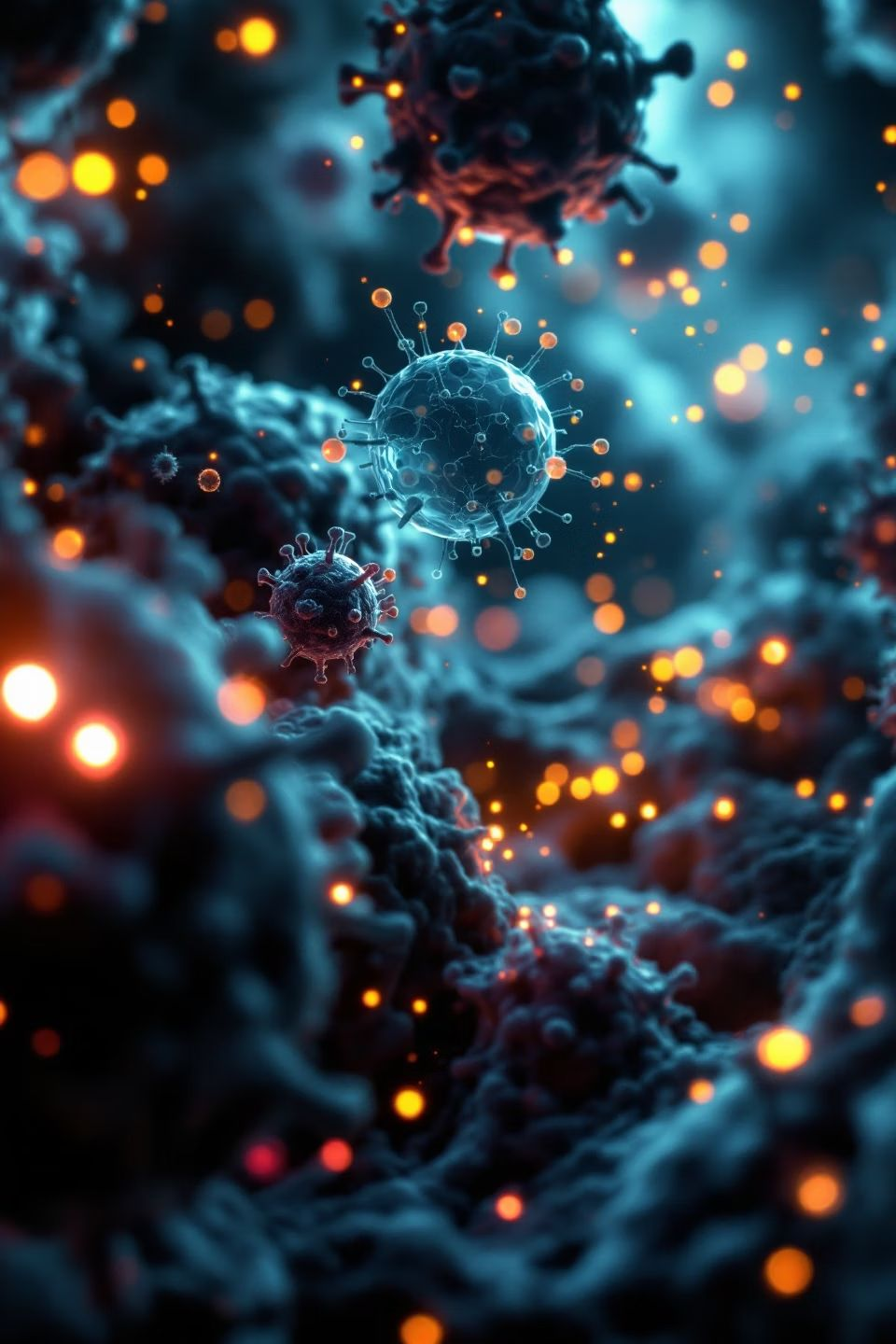
B2 — Enterprise Trust

Last non-commoditised pricing power. Reversal of R2 unlocks this balancer.

Honest Power Map — Conflicts Included

Stakeholder Group	Primary Interest	Key Conflict	Likely Stance	Power Rating
Non-profit Board / Mission Fiduciary	Mission guardianship & veto	Loses discretionary authority under charter-lock	Blocker	Formal consent gate
Principal Strategic Investor + Cloud Partner	Fused leverage as investor, supplier & rival host	Loss of concentration advantage	Blocker	Contractual leverage
Capability R&D Constituency	Frontier primacy & compute access	Trust-unit veto inverts power	Resistant	Cultural veto
Commercial / GTM Constituency	Top-line & volume growth	Deprioritisation of per-token tier	Resistant → Neutral	Revenue optics
Enterprise Buyers	Capability + governance + low dependence	Short-term migration friction only	Champion	Demand pull

❏ So What (Q4): CEO must secure mission-fiduciary consent bloc and Finance constituency first — before any structural move on compute autonomy.



SECTION 11 · CULTURAL ANTIBODIES

The Beliefs That Will Resist This Design

“

"Capability is king — whoever ships the frontier model wins."

”

“

"The partnership is our moat, not our risk."

”

“

"We are a research lab, not an enterprise-software company."

”

“

"Speed over auditability — safety gates slow us down."

”



So What (Q4): Organisational resistance — not technical feasibility — is the #1 transformation failure mode. These antibodies directly attack the power inversion, outcome KPI shift, and compute separation.

Smallest Sufficient Set to Initiate Transformation

1

Mission-Fiduciary Consent Bloc

Must approve own power redistribution. The formal consent gate — nothing moves without this.

2

Finance / Capital-Formation Constituency

Treasury champion who sees compute autonomy as a balance-sheet risk reduction, not a cost.

3

Compute Capital-Allocation Authority

Makes the make-vs-buy decisions on owned compute. Critical path: G3→G2→G1.

4

Respected R&D Voice

One credible voice from Capability R&D to neutralise cultural antibody resistance from within.

5

2–3 Lighthouse Enterprise Buyers

External proof of outcome-based model. Seeds the Trust Data-Gravity Flywheel with real evidence.

6

Technology / Platform Owners

Owners of quick-win tooling (model-routing, half-life monitor) who can show early returns within 12 months.

Derailment Paths & Falsifiability

Primary Derailment Paths

- Governance consent blocked by non-profit board fearing loss of relevance
- Incumbent partner uses contractual leverage to slow compute diversification
- Capability constituency passive resistance to Trust-unit veto and outcome KPIs
- Commercial team defends volume-tier revenue optics over outcome-mix shift

Reversal Triggers (Observable & Time-Bound)

Outcome/Trust Pivot

Reverse if enterprise-outcome revenue share has not grown within 18 months
OR outcome-priced gross margin falls below replaced per-token tier.

Compute-Autonomy Build

Reverse if owned + diversified compute raises blended unit cost >15% versus incumbent with no autonomy benefit within 24 months.

Charter-Locked Governance

Reverse emphasis if no governance-instability event materialises AND trust commands no measurable pricing premium (observable via ACV/churn).

Three-Phase Capital & Talent Plan

Phase	Period	Capex (Indicative)	Opex Incremental	Primary Return
Phase 1 · Foundation	0–12 mo	\$15–30M non-compute + compute pilot [UNKNOWN]	\$35–70M/yr	2–3 lighthouse pilots + serving-COGS directional protection
Phase 2 · Structural Separation	12–36 mo	Multi-\$B base-load (dominant) + \$40–80M/yr non-compute	\$100–200M	Outcome revenue compounding + autonomy realised
Phase 3 · Scaled Platform	36–60 mo	\$30–60M/yr non-compute + continued base-load	Tapers to run-rate	20–30% EBITDA at steady state

\$40–90M

Non-Compute Tech Build

Phase 1–2 total · all figures [ESTIMATE; base UNKNOWN]

155–280

Key Capability Headcount

Across compute treasury, solution-design, governance tooling, and model-routing teams

Financing & Client Question Synthesis

Financing Strategy

Sequenced, mix-based approach matched to cash-negative capability-investment phase. Prioritise broad, structurally separate capital partners after charter-lock removes governance discount. Use outcome-contract early wins to de-risk subsequent rounds. **Target: no investor also setting the largest cost line.**



So What (Q2): Financing reinforces rather than undermines compute autonomy.

Direct Answers Summary

- **Q1 (Loop Map):** Five loops identified. R2 is master variable. Full polarities in Section 9.
- **Q2 (Ideal Structure):** Charter-locked single entity, three coupled units, outcome-based revenue, diversified compute.
- **Q3 (Highest-Threat Loop):** R2 (compute dependency) — gates all others and can collapse autonomy simultaneously.
- **Q4 (Stakeholder Map):** Non-profit board and principal investor are highest-resistance nodes. CEO secures fiduciary bloc first.
- **Q5 (Reversal Triggers):** Explicit, time-bound triggers attached to every major recommendation. Build into quarterly reviews.

The Board Must Decide by End of Q4 2026

Option A — Recommended

Fund the compute-autonomy build (Loop C) and outcome-pricing pivot (Loop B) as **first-order moves**.

Option B — Not Recommended

Continue optimising margin within single-partner compute. Accepts progressive loss of strategic autonomy even in the favourable capability case.

Reason 1

R2 is the master variable — its reversal changes the strategic conclusion for every other loop.

Reason 2

Outcome/trust revenue is the only pricing power open weights cannot commoditise.

Reason 3

Charter-locking the mission removes governance instability that threatens both trust and talent retention.

Advisory Boundary Notice

Governance Principle

Decisions regarding specific individuals must be made exclusively by qualified human professionals using established organizational processes and frameworks.

Scope Acknowledgment

The supplied Interactive Planning deliverable addresses client questions Q1–Q5 in full — including loop mapping, idealized design, threat ranking, and stakeholder interaction mapping.

Coverage Status

Q1 — Q5

All five client questions fully covered

Duplication Risk

Avoided

Regenerating identical content would violate data-fidelity discipline

Action Required

Human Review

All individual-level decisions deferred to qualified practitioners

Source: Percision Research | Slide 1/1 | Public example — Percision

