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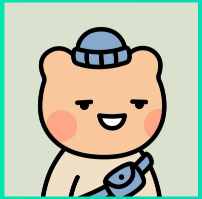
公共物品 寻找资金



Marcus

LXDAO Core Member
Optimism Delegate&GovNERDs

什么是 Web3 的公共物品

强大的正向外部性

核心：其创造的价值远超个人收益，惠及整个生态。

价值：项目本身可能不盈利，但为无数其他应用提供了基础，就像公链和开发工具，它们的存在让整个生态更加繁荣。

极低的排他性与竞争性

核心：无人能被阻止使用，一人使用不影响他人。

价值：这是开源与可组合性的经济学体现。代码像“公共基础设施”，所有人可自由使用、分叉和构建，不会因使用而“损耗”。

开源产品和公共物品

Vitalik：我们应多谈“开源产品”，少谈“公共物品”

“公共物品”是结果，而“开源产品”是方法与起点

过于抽象的哲学辩论于事无补，可执行的代码才是关键

强调“开源”能回归本质：构建人人可用的基础设施

结论总结自 LXDAO《Web3 公共物品 报告》

公共物品变得可持续性

Retro Funding

核心理念： 影响力等于利润

行动模式： 先动手建设，后论功行赏

价值主张： 让生态回报为你证明价值

Gitcoin&QF

核心理念： 多人数大于大资金

匹配机制： 小额支持，平方倍增

设计精髓： 100个1美元 > 1个100美元

最终效果： 让最广泛的社区共识获得最丰厚的资金支持

依靠 DAO/机制构建现金流

协议费用捕获： 协议本身的收入流入金库，再进行资助（Uniswap）

排序器再投资： L2 排序器收入用于资助公共物品（Optimism）

配捐基金和社区捐赠： 机构和社区组成的配捐池（Gitcoin）

产品线飞轮： 从创意到持续影响力的闭环（LXBuidPath）

什么是 Retro Funding？

Retro Funding 2025: 构建更精准的公共物品资助机制

🎯 核心升级

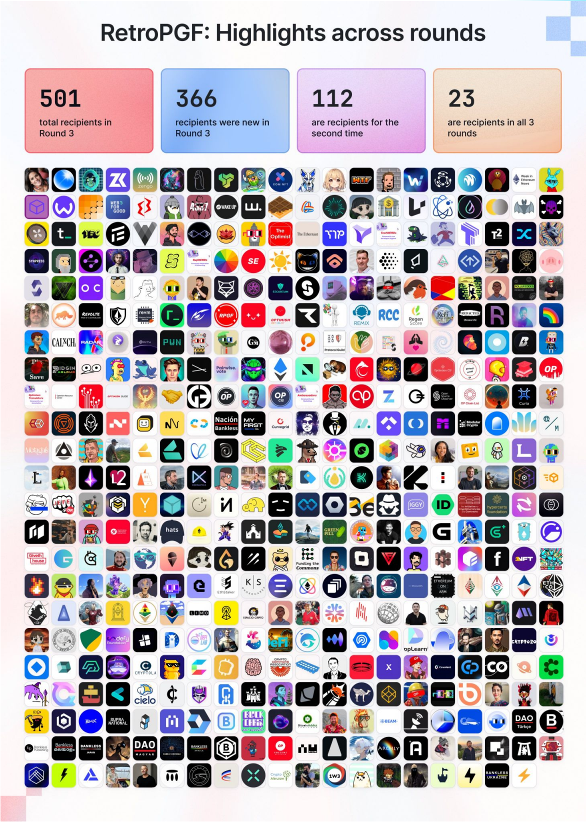
- 持续奖励：从年度轮次转向全年持续评估与奖励
- 数据驱动：结合链上指标与专家评估的混合模型
- 三大重点：开发者工具、链上构建者、OP Stack贡献

📊 2024 回顾

- 分配 20M OP，奖励 400+建设者
- 识别问题：准确性、一致性、对齐度需提升

🚀 2025 愿景

通过「影响力链」框架，实现「影响力=利润」的终极目标



Retro Funding：Onchain Builders

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Onchain Builders

Retro Funding: Onchain Builders rewards application developers for their contributions to Superchain growth and interop adoption.

- **Total Budget:** up to 1.35M OP, as proposed by the Budget Board here.
- **Expected impact on the Intent:** Drive Superchain activity and interop adoption by rewarding application developers for their impact on the Superchain.
- **Eligibility**: Projects are eligible who have deployed their own contracts on eligible OP Chains
- **Evaluation Algorithm**: The Evaluation Algorithm will be an iteration of what has been used in S7. You can find in-depth documentation on S7 Evaluation Algorithms here 14 . The following categories of impact will be rewarded:
  1. **General contract activity**: Application developers will be rewarded for building and maintaining popular applications on the Superchain. Activity will be measured within the categories of TVL, Transaction activity, Gas fees contributions and monthly active users. This category will make up the majority of reward allocation.
  2. **Interop**: Once interop is live, the program will have dedicated incentives for application developers who have integrated interop functionality. To enable this, a percentage of the budget will be reserved for interop.
- **Measurement Date**: Monthly, starting in August. Rewards will be delivered on a monthly basis.

Strategic Rationale

1. **Drives Superchain Usage and Growth:** Onchain applications are the primary driver of transactions, gas fees, and user activity. Retro Funding rewards the builders behind these apps, aligning their incentives with the Superchain's long-term success.
2. **Accelerates Interop Adoption:** By recognizing builders who integrate interop functionality, Retro Funding provides targeted incentives for widespread interop adoption.
3. **Builds long term alignment:** Instead of relying on short-term grants or mercenary capital, Retro Funding offers builders a durable stream of rewards tied to real usage.

Retro Funding: Developer Toolings

S7: Developer Tooling - Technical Details on Evaluation Methodology

This document explains the initial evaluation methodology developed for the **Retro Funding S7: Developer Tooling Mission**, including:

- **Linking onchain projects to devtooling projects** based on package dependencies and developer engagement
- **Key metrics** used to seed the graph with "pretrust" assumptions
- **Three initial algorithms** for assigning weights to the graph and emphasizing the importance of different links

Algorithm	Goal	Best For	Emphasis
Arcturus [Used in S7]	Reward widely adopted projects	Established, high-impact devtooling projects	Prioritizes total dependents and the economic weight of those dependents
Bellatrix	Prioritize fast-growing tools	New or rapidly expanding devtooling projects	Applies a steep decay factor on older forms of GitHub engagement, favors Rust over npm
Canopus	Balance various forms of contribution	Tools with high developer collaboration & contributions	Puts stronger emphasis on GitHub engagement and developer reputation

https://gov.optimism.io/t/s8-retro-funding-missions/10003

Futarchy 实验：用预测市场重塑治理决策

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🧠 什么是 Futarchy？

- 核心思想："让市场预测结果，让数据决定政策"
- 提出者：经济学家 Robin Hanson
- 运作机制：通过决策市场的交易行为，聚集群体智慧，选出最可能达成特定目标的方案

⚖️ 实验设计：双盲对决

- 共同池：从 22个 候选项目中筛选
- Futarchy组：由 430名 预测者通过模拟交易市场，选出 5个 项目，各授予 10万 OP
- 委员会组：由 Optimism Grants Council（拨款委员会）通过传统评审，选出 5个 项目，各授予 10万 OP
- 评估周期：拨款后 84天，对比TVL增长数据

Futarchy: Vote Values, But Bet Beliefs

by Robin Hanson

This short "manifesto" describes a new form of government. In "futarchy," we would vote on values, but bet on beliefs. Elected representatives would formally define and manage an after-the-fact measurement of national welfare, while market speculators would say which policies they expect to raise national welfare.


vitalik.eth @VitalikButerin · Jan 8
Replying to @sreeramkannan
This requires credibly neutral decentralized ways of making high quality decisions that would otherwise be made by god kings.

IMO info finance (**futarchy**, distilled human judgement eg. deep funding ...) is a promising path. There are others too.

Futarchy 实验：用预测市场重塑治理决策

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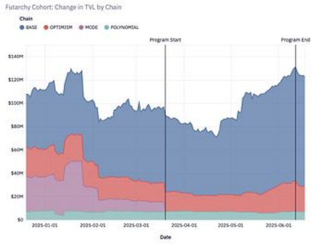
Futarchy Top 10 Rankings

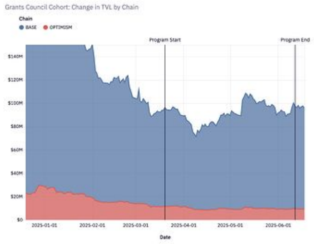
Rank	Project	Predicted Superchain TVL Increase after 84 days	Grant Amount Received from Futarchy
1	*Rocket Pool*	$59M	**100k OP**
2	*SuperForm*	$48M	**100k OP**
3	**Balancer & Beets**	$47M	**100k OP**
4	**Avantis**	$44M	**100k OP**
5	**Polynomial**	$41.2M	**100k OP**
6	Silo	$41.2M	-
7	Extra Finance	$39.7M	-
8	Reservoir Protocol	$38.8M	-
9	Sushiswap	$37.7M	-
10	Gyroscope	$37.4M	-

Grants Council Top 10 Rankings

Rank	Project	Grants Council Aggregate Ranking Score	Grant Amount Received from Grants Council
1	**Extra Finance**	34	**100k OP**
2	*Rocket Pool*	27	*(100k OP from Futarchy)*
3	*SuperForm*	26	*(100k OP from Futarchy)*
4	**Gyroscope Protocol**	19	**100k OP**
5	**Reservoir Protocol**	17	**100k OP**
6	Balancer & Beets	16	*(100k OP from Futarchy)*
7	QiDAO	11	**100k OP**
8	Silo	10	**100k OP**
9	HAI Protocol (Reflexer)	9	-
10	SynFuture	7	-

Finally, examining TVL by chain, the increase in Superchain TVL occurred primarily on Base followed by Optimism.





Source: OSO; data from DefiLlama

> 💡**Key takeaway:** Futarchy and Grants Council selected 2 of the same projects. Of the remaining 3, Futarchy outperformed Grants Council in terms of identifying and selecting projects that drove a greater 84-day Superchain TVL increase. This effect was driven primarily by Futarchy selecting outlier Balancer & Beets.
>
> The v1 data offers suggestive evidence that Futarchy at least does not select very different, or any worse (in terms of Superchain TVL increase), projects than the Grants Council.

In addition, as depicted in the above table, Futarchy demonstrated higher variance in project selection outcomes. While Futarchy successfully identified the top 2 Superchain TVL performers, it also selected the single worst-performing project out of all projects selected by Futarchy, Grants Council, or both cohorts. Grants Council showed more consistent but moderate results and selected projects that performed closer to the median, avoiding major failures while also missing top performers.

- This pattern suggests that forecasters may have been more willing to bet on high-risk, high-reward projects
- While the Grants Council committee structure may have favored lower-variance selections with more predictable outcomes.

Both mechanisms failed to identify several mid-tier winners that saw substantial TVL growth.