



A New Business Model in Autonomous Trucking

MIT Mobility Initiative Vision Day

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www.bot.auto

The mismatch

What's the market pain point?



Capacity



What can tech offer?



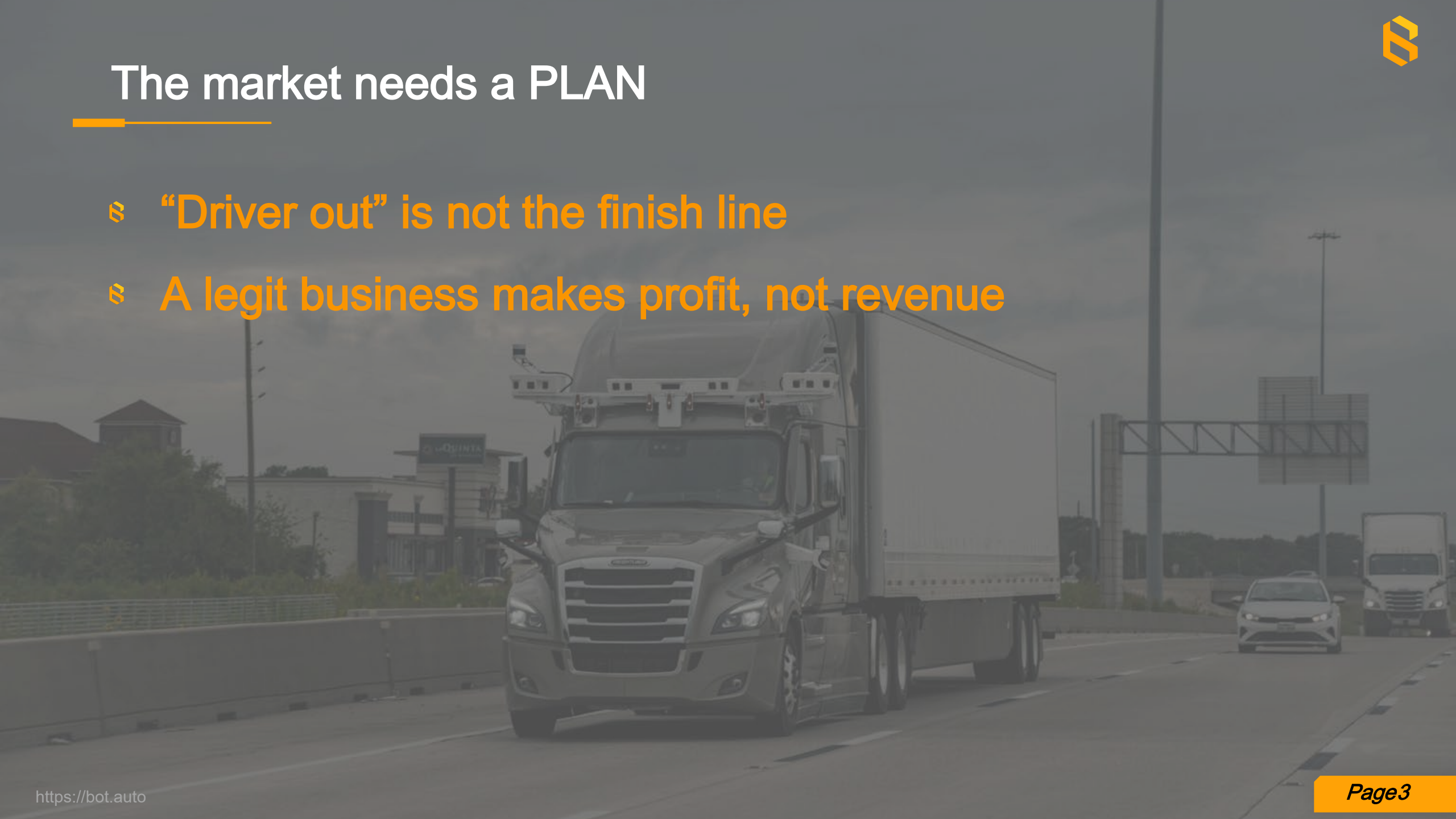
Demo





The market needs a PLAN

- § “Driver out” is not the finish line
- § A legit business makes profit, not revenue





The business model comparison

§ The business model

Software vs. Hardware vs. Transportation a service

§ Asset and operation

Whatever approach provide capacity wins



The cost of autonomous driving

- § Driver cost
- § Operating cost
- § Customer acquisition cost





Consensus on CPM

- § Lessons from MPI
- § We can make it work
- § A “countdown billboard” for all

Beware of tech bubble

- § “Scaling law” does not apply to autonomous driving
- § End-to-end learning?



Beware of tech bubble



World model

VC in 2024
Q4

End-to-end
learning



Technology ideologization

- § Okay to ideologize the “objective”
- § Not okay to ideologize the “approach”



Thank You!

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