A solo effort, an acquisition and the Amazon connection

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About a half-dozen driverless testing deployments. The unveiling of perhaps the most thoughtful self-driving vehicles produced to date. A blockbuster acquisition.

No, the final stretch of 2020 has not lacked for excitement.

In a year in which many wondered whether the pandemic would slow the pace of autonomous-driving developments, the opposite has happened, and the scrabble of activity has underscored the potential of robotics carrying passengers around urban areas.

It also has brought into sharper focus the business models that companies are formulating to capture a slice of what Zoox CEO Aicha Evans calls a “multitrillion-dollar opportunity.”

Zoox may be the most ambitious in its ambitions. From its inception six years ago, the Bay Area startup embarked on a plan to handle the major challenges involved in a ride-hailing business all by itself: Develop its own self-driving system. Create an all-electric, purpose-built vehicle from scratch. Establish its own ride-hailing network.

Those efforts remain a work in progress. But Zoox took a step forward last week with the public unveiling of its four-passenger shuttle with a power supply that can last as long as 16 hours and which has bidirectional driving capability. (See story on Page 8.)

In a business in which the word “innovative” gets tossed around like space nickels, the Zoox vehicle truly qualifies as such.

It’s not hard to imagine the emerging commercial battlegrounds. Someday Zoox will compete with the six-seat Cruise Origin in the dense confines of San Francisco and in Las Vegas with the service that Motional — the brand created by the Hyundai-Aptiv joint venture — is partnered with Lyft.

While Zoox has a long way to go in cobbled together its own ride-hailing network, the arrival of its vehicle has burnished the company’s bona fides and affirmed the go-it-alone approach, Evans said.

“A couple of our competitors said, ‘They’re just smoking something. I don’t know what, over there,’” she said. “They said, ‘They can’t build a vehicle’ or ‘It’s not going to be autonomous.’ There was a lot of ‘can’t, can’t, can’t’... They called it ‘vaporware horseshit’. We took it in stride. Our first vehicle, we were code-naming VHI, and then 2.3. We’re now on No. 6. This is a mission-driven, dedicated, resilient company.”

Given that Amazon acquired Zoox this year for $1.2 billion, it’s natural to wonder whether Zoox’s autonomous-driving technology and envisioned-minded vehicle could deliver packagings.

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“I just want to make it clear, “ Urmson said. “If our business model were to do all three, then we’d be kind of a three-miracle company. I feel like it’s enough to ask for one miracle.”

It’s a different approach from the one taken by Zooz. But there’s one commonality between the companies: Amazon. Sixteen months before it acquired Zooz, Amazon made an undisclosed investment in Aurora’s $530 million Series B round in February 2019.

“Trucks or robotaxis? Lock-of-all trades or a master of one? These are divergent avenues leading into the self-driving future. Meanwhile, Amazon’s investment in one and purchase of the other is reminiscent of the old cliché: Upon reaching a fork in the road, take it. 2/20