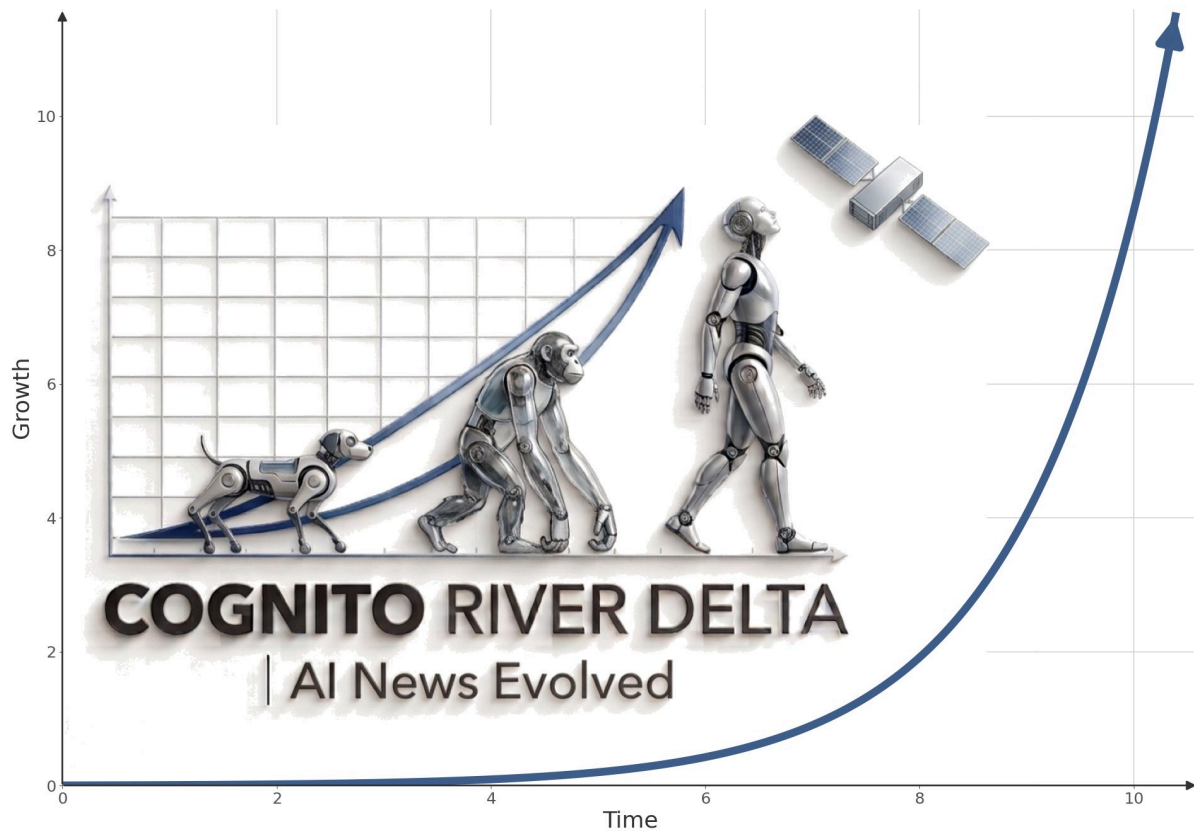




DEEP DIVE

Tesla Grockbot and Agentic Robotaxis

September 30, 2026

This video provides a comprehensive update on the current state of the autonomous vehicle (AV) and robotaxi race, focusing primarily on Tesla's recent integration of "Grockbot" and the fragmented strategic approach of Me

AI News Evolved · cognitoriverdelta.ai

DEEP DIVE

Tesla Grockbot and Agentic Robotaxis

September 30, 2026 · 6 min read

Autonomous vehicles

Agents & applied AI

Source video: *Tesla Just Changed What Robotaxi Can Do* — *Brighter with Herbert*

Summary

This video provides a comprehensive update on the current state of the autonomous vehicle (AV) and robotaxi race, focusing primarily on Tesla's recent integration of "Grockbot" and the fragmented strategic approach of Mercedes-Benz. The central thrust of the video is that the definition of a robotaxi is shifting from a vehicle that simply drives itself to one that acts as a sentient personal assistant capable of executing complex, real-world errands via agentic AI.

The discussion highlights a widening gap between Tesla's integrated ecosystem—combining Full Self-Driving (FSD), AI agents, and the upcoming Cybercab—and other manufacturers who are juggling multiple third-party suppliers to achieve similar results. It matters because it suggests that the ultimate competitive advantage in the robotaxi market may not be the driving software alone, but the "agentic" layer that allows the car to interact with web services and perform tasks on behalf of the user.

Main topics

Tesla and the Transition from Grock to Grockbot

The video emphasizes a critical technical distinction between "Grock" and "Grockbot." While Grock is described as a standard AI chatbot (comparable to ChatGPT or Anthropic's Opus) that answers questions, Grockbot is an "agent." An agent does not just provide information; it executes tasks.

- **Functional Capabilities:** Grockbot can manage a user's inbox and calendar, discuss existing files and chats, and perform "meaningful work" hands-free. It integrates with web services such as Google Calendar and Microsoft inbox. Users activate these "connectors" via the Grock app on their phones.
- **Real-World Utility:** The speaker provides examples of Grockbot handling complex errands. One user, Devon Olsen, used it to order a specific Starbucks drink (a grande iced pumpkin cream shake and espresso with one pump of brown sugar for \$7.30) while FSD drove him to the store. Another user, Nick Cruz Betain, used it to order AirPods 5 from an Apple Store in Markville Mall (\$22.27).
- **Technical Guardrails:** Brian White notes that the AI is being rolled out cautiously. For example, when asked to turn off headlights in a parking lot, Grockbot refused to do so directly—citing the risk of doing it while on the road—and instead offered to show the user the correct button on the screen.
- **Professional Applications:** Yantasai, a senior AI engineer for FSD, claims Grockbot can handle DoorDash, Open Table, and Uber Eats. More technically, it can "spin up a PR" (pull request) for coding or draft documents in Google Docs or Word while the user is en route to a meeting.
- **Cybercab Integration:** The speaker notes that Grockbots are integrated into the Cybercab fleet, meaning a user's personal AI agent travels with their account into any Cybercab they use.

Mercedes-Benz's Fragmented Strategy

The video analyzes Mercedes-Benz's approach to autonomy as "rudderless" and "lost." The speaker points out that Mercedes is currently juggling three different self-driving partnerships:

1. **Nvidia:** Using the Alpamo system.
2. **Momenta:** Used for L2/L2++ (Advanced Driver Assistance Systems) across different global regions.
3. **Wave:** A new production deal to integrate the "Wave AI driver" into future vehicles.

Technical Context on Wave: Wave utilizes end-to-end neural nets and is described as "hardware agnostic." While primarily built for vision and radar, it can accommodate LiDAR. The goal is to bring the AI driver to consumer cars within the next two years.

The Failure of In-House Systems: The speaker critiques Mercedes' "Drive Pilot" system, noting it was too restrictive (limited to 30-35 mph on highways, requiring a lead vehicle, and

only functioning in specific weather/lighting conditions). He argues that Mercedes lacked the on-board compute to expand these features and lacked the production volume (compared to Tesla) to solve the problem in-house, forcing them to seek external solutions.

Waymo's Public Transit Integration

Waymo is attempting to increase utility through a "transit rewards program" in the San Francisco Bay Area.

- **The Incentive:** Riders receive \$2.85 in "Whimo cash" if they connect a Waymo ride with public transit (using a Visa card) within a two-hour window.
- **Infrastructure:** Waymo is leasing 40 dedicated parking spaces at Cal Train stations to stage vehicles, aiming to solve the "last mile" problem by allowing commuters to take a train into the city and a Waymo to their final destination.

Other Industry Developments

- **Zoox:** A Tesla dashcam captured a Zoox vehicle getting into an accident in Las Vegas. The Zoox vehicle stopped in an intersection to yield to an approaching ambulance, but was subsequently rear-ended by an SUV. The speaker argues the Zoox vehicle acted legally and correctly, while the human driver behind it failed to pay attention.
- **WeRide:** This global AV software company is launching a 12-hour driverless live stream in China to demonstrate its capabilities in busy districts.
- **Cybercab Fleet:** The fleet has grown to 69 vehicles registered with the Texas DMV.
- **Cultural Impact:** A K-pop group (referenced as Ryzen or Reason) filmed themselves using FSD in a rented Model Y in Los Angeles. The speaker notes this viral endorsement is highly powerful, especially given that FSD is currently limited to the Model S, X, and Cybertruck in Korea due to import/export laws.

Claims and numbers

- **Waymo Rewards:** \$2.85 refund in "Whimo cash" for connecting rides to public transit (Waymo).
- **Waymo Infrastructure:** 40 dedicated Cal Train station parking spaces leased (Waymo).
- **Cybercab Fleet:** 69 vehicles registered to the Texas DMV (Tesla).
- **X (Twitter) API Costs:** Tokens are approximately \$2 per million (stated by Brian White).

- **Starbucks Order:** \$7.30 for a grande iced pumpkin cream shake and espresso (Devon Olsen).
- **Apple Order:** \$22.27 for AirPods 5 (Nick Cruz Betain).
- **Mercedes Speed Limit:** Drive Pilot was limited to 30-35 mph on highways (stated by Brian White).

Predictions and catalysts

- **WeRide Live Stream:** A 12-hour driverless live stream in China is scheduled for "tomorrow" (relative to the video recording).
- **Mercedes Deployment:** The Wave AI driver is expected to be in Mercedes consumer cars within the next two years (claimed by Alex Kendall, CEO of Wave).
- **The Shift in Luxury:** The speaker predicts the definition of luxury will shift from the prestige of owning/driving a high-end car to the utility of having a sentient chauffeur/assistant.

Entities

- **Companies/Products:**
 - **Tesla:** FSD, Grock, Grockbot, Cybercab, Model S, Model X, Model 3, Model Y, Cybertruck.
 - **Mercedes-Benz:** Drive Pilot.
 - **Waymo:** (Robotaxi service).
 - **Zoox:** (Robotaxi service).
 - **WeRide:** (AV software company).
 - **Wave:** (AI driver supplier).
 - **Nvidia:** Alpamo.
 - **Momenta:** (AV supplier).
 - **X (formerly Twitter):** (Platform hosting Grock).
 - **Other:** Starbucks, Apple, Cal Train, DoorDash, Open Table, Uber Eats, Google, Microsoft.
- **People:**
 - **Brian White:** Tesla journalist/Futurazza.
 - **Devon Olsen:** Tesla FSD user.

- **Nick Cruz Betain:** Tesla FSD user.
- **Yantasai:** Senior AI engineer at Tesla FSD.
- **Alex Kendall:** CEO of Wave.
- **Jensen Huang:** CEO of Nvidia.

Open questions and reliability

- **Mercedes' Strategy:** The claim that Mercedes is "lost" or "rudderless" is presented as an opinion by the speakers and commenters.
- **Tesla Partnerships:** The theory that other OEMs (Hyundai, BMW, Mercedes) haven't partnered with Tesla due to a disagreement over the percentage split of subscription fees is speculative.
- **WeRide's Live Stream:** Brian White expresses doubt about the representativeness of the 12-hour live stream, suggesting it may be a "marketing stunt" where headquarters closely monitors the specific ride.
- **Cybercab Fleet Status:** The speaker clarifies that while 69 Cybercabs are *registered* to the Texas DMV, this does not necessarily mean they are currently *active* robotaxis.
- **AI Capabilities:** The ability of Grockbot to "log into any website" to book hotels is presented as a capability, but specific verification of this for every possible site is not provided.

Related reports

DAILY AI BRIEFING

Multi-Trillion-Dollar Capital Expenditure Expansion

The global technology and investment landscape is undergoing a structural pivot toward physical AI, autonomous commercial transport, and massive orbital compute infrastructure, driven by multi-trillion-dollar capital expenditure plans across Elon Musk's

WEEKLY DIGEST

Weekly video script - 2026-W40

Tesla is undergoing a high-stakes metamorphosis from an automaker to an "Embodied AI" powerhouse, with Optimus production already scaling tenfold. We're also tracking the end of the chatbot era as AI shifts toward true e

corporate ecosystem. Industry analyses from le

September 26, 2026 · Space-based compute & power · Autonomous vehicles

Week of September 28, 2026 · Humanoid & general robotics · Agents & applied AI

CATEGORY ROLLUP

Frontier Intelligence Agentic Autonomy - 2026-W40

This week, the frontier of artificial intelligence has undergone a decisive structural transition: the era of the "chatbot" has ended, and the era of the "agent" has begun. The industry is moving away from static Large L

Week of September 28, 2026 · Frontier labs & models · Agents & applied AI

Everything here is free, and reader-supported.

Join free on Patreon to get the weekly digest by email, or become a member to get each morning's briefing by email before it reaches the site, request custom analysis, and get early access to new research tools. What members get

♥ [Join or support on Patreon](#)

Informational analysis synthesized by AI from sourced, dated material, curated by a human. Treat specific claims as unverified until checked. Not financial advice.

[About](#) · [How this is made](#) · [Corrections](#)