

# Zack Jackowski

Boston Dynamics | Chief Product Technology Officer



# Atlas : Ready for Work

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Blank-sheet design focused on simplicity,  
building strongest base for cost and reliability

Achieving these goals without sacrificing  
compelling performance

Very strong sim-to-real performance and data  
collection productivity

Built to do real work – ready for all types of  
industrial applications





# "Tech Specs"

**Weight Capacity** 50 kg (110 lbs)

**Self swappable batteries**

**Reach** 2.3 m (7.5 ft)

**Continuous Range of Motion Joints**

**Sensing** Tactile and 360° camera view

**IP Rating** IP67

**Operating Temp** -20° to 40° C (-4° to 104° F)

**Height** 1.9 m (6.2 ft)

**Weight** 90 kg (198 lbs)



Boston Dynamics



# Jaehoon Chang

Hyundai Motor Group | Vice Chair

Why Robotics

# Group Robotics Vision

HYUNDAI  
MOTOR GROUP

What HMG Brings

# HMG Robotics Value Chain

How to Scale

# Global Robotics Ecosystem

01

# Group Robotics Vision

Robotics as the next industrial platform

02

03

# From Technology to Global Scale



# End-to-End Industrial Platform



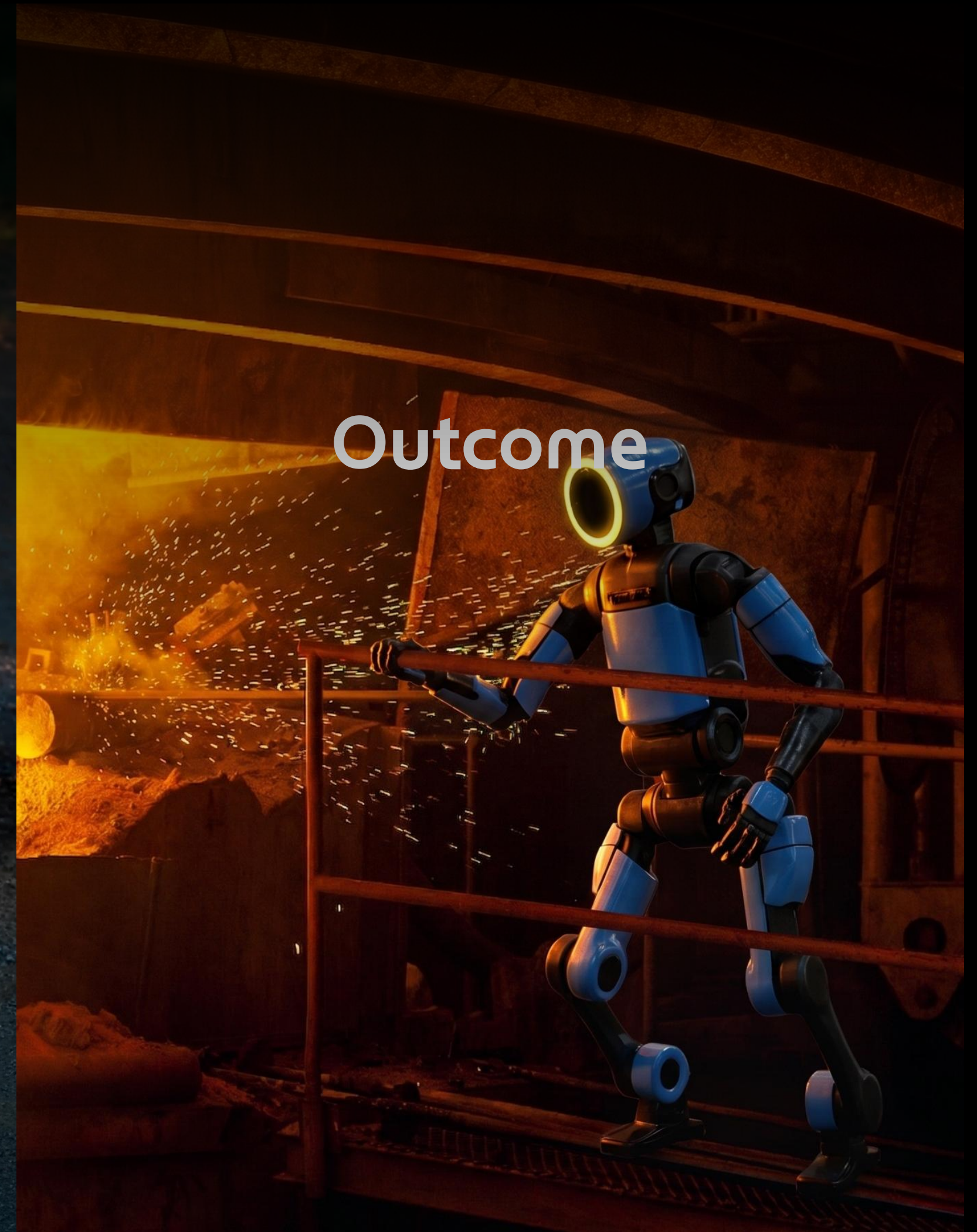
# Partnering Human Progress



Vision



Principle



Outcome

02

# HMG Robotics Value Chain

Combining group-wide assets into one robotics execution system

01

03

Business Site Status (As of 2025)

**139**

Manufacturing sites

**32**

R&D Centers

Number of Employees (As of 2025)

**72**

Affiliates

**330,000**

Employees

Global

**TOP3**

**Real-world  
Deployment field**

**Cross-industry  
Execution base**

**Proven scale-up  
Experience**



1. Group Robotics Vision

2. HMG Robotics Value Chain

3. Global Robotics Ecosystem

## Robot Intelligence & Product

BostonDynamics



## Manufacturing & Components



# Physical AI Ecosystem

## Logistics & Deployment



## Finance & Customer Expansion



03

# Global Robotics Ecosystem

Dual Robotics Hub

01

02



## US

### Innovation & Validation Hub

- BD technology
- Market feedback & Cost reduction
- Field validation
- Localized SCM & Manufacturing

## Physical AI Ecosystem



## Korea

### Flexible & Adaptive Hub

- Application-specific design
- Flexible manufacturing
- Cost optimization
- Rapid commercialization





# We will industrialize robotics

Not just showcase robots -  
with **Boston Dynamics**, we will bring them into **real industries**

# Amanda McMaster

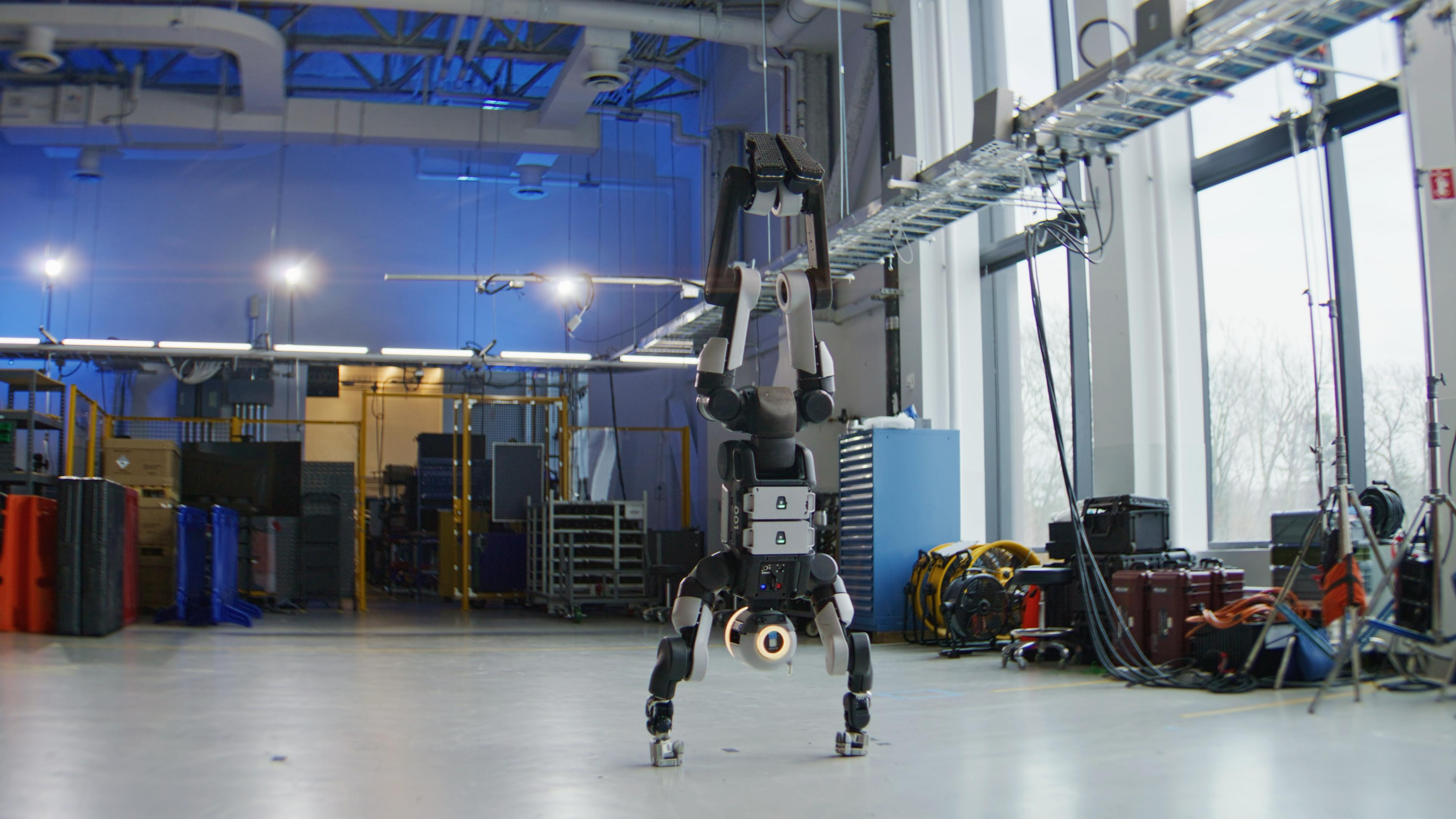
Boston Dynamics | Interim CEO



# Humanoids vs. Hype: The State of Robotics







OUR PATH:

# Build a profitable, scaling business



INDUSTRIAL

## Why start here?

- Repeatable Environments
- Repetitive Tasks
- Clear ROI model



SERVICE

## What's next?

- Closer to people
- Offices, stores, last mile



CONSUMER

## Where are we ultimately going?

- Safe, reliable home robots
- Generalist robots for everyday assistance



# Our Differentiators

Performance

Customer Value

Artificial Intelligence

Scalability

01

# Performance

Spot is the **most widely deployed,**  
**most reliable** mobile robot in the world today.

**3,000 hours** between human interventions.

**Over 30 million** inspections to date.



02

# Customer Value

**500+**  
Customers

**40+**  
Countries

## Industries

### Semiconductors

Global Foundries

Intel

Micron

Texas Instruments

and others



02

# Customer Value

Averaging  
**2 year ROI payback**

Deployment, services  
& support infrastructure

The industry's only  
end-to-end integration  
& service solution



# Delivering Impact in Industrial Environments

## Semiconductor Spotlight

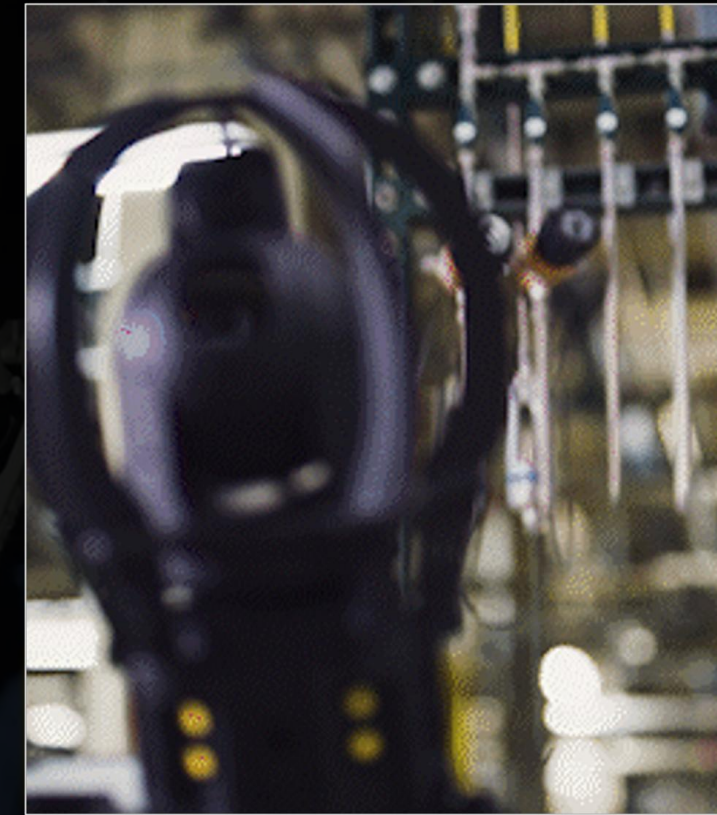


intel

and others



micron



Visual



Thermal



Acoustic



Vibration



03

# Artificial Intelligence

Physical AI is a **paradigm shift**.  
We no longer program robots. **We teach them.**  
But it requires real world data.  
Only company already **collecting data at hundreds of customer sites.**

Partnerships with Google DeepMind

**HYUNDAI**  
MOTOR GROUP

Boston Dynamics



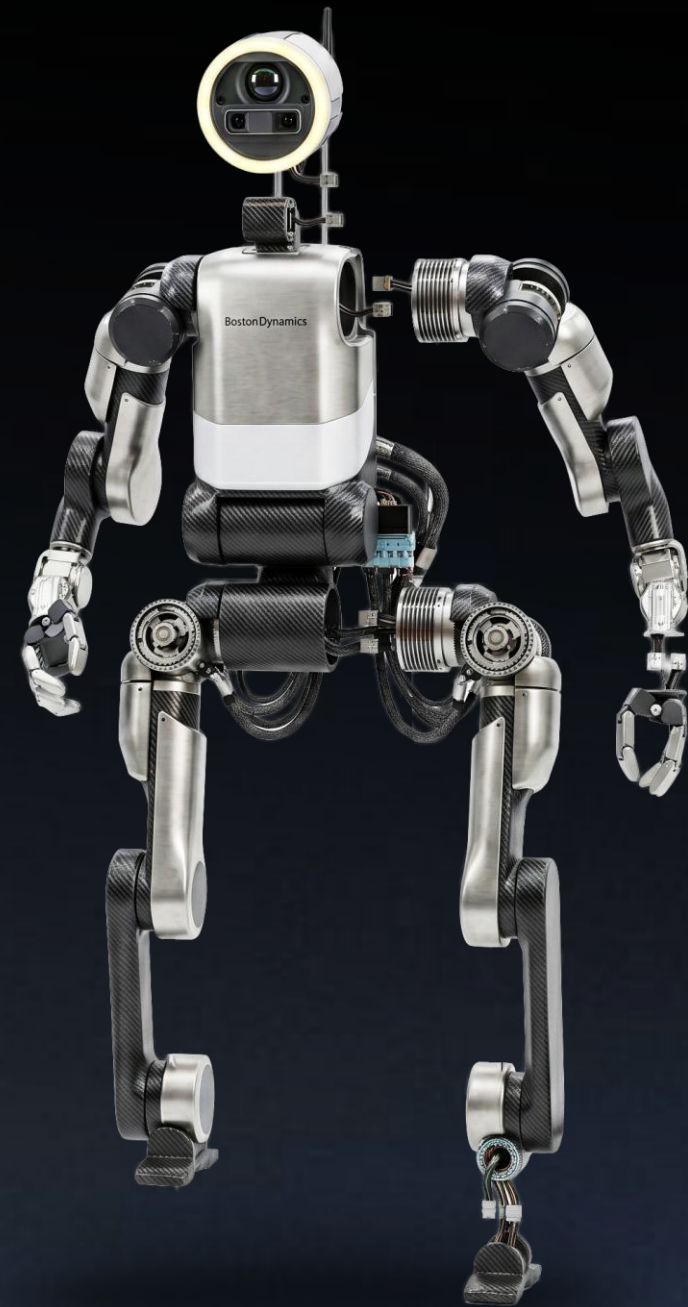
# Key Atlas Partnerships

Robotics Metaplant Application Center - Summer 2026



# Key Atlas Partnerships

## Google DeepMind AI Partnership



Reasoning AI Layer via  
**Google DeepMind**



Physical AI Layer via  
**Boston Dynamics**

## Uniquely Positioned to Harness AI + Unlock Scale

04

# Scalability

**Simplified design** for mass manufacturing  
HMG deploying **tens of thousands**  
Factory capacity up to **30,000 units** annually  
Extending to additional customers over time



Boston Dynamics



# Heung-soo Kim

Hyundai Motor Group | Executive Vice President

# Focus on the Execution Phase



**Real-World Validation**



**Value Chain Integration**



**Scalable Deployment**



**Execution  
at Scale**

# Real-World Validation

Value Chain Integration

Scalable Deployment

## Use-Case Verification

Factory-specific Tasks



## Real-world Operational Data

Data from Various Fields



## Applicability

Deployment Feasibility



Real-World Validation

Value Chain Integration

Scalable Deployment

## Robot Technology



## HMG Robotics Ecosystem



Manufacturing

HYUNDAI  
MOBIS

Components

HYUNDAI  
GLOVIS

SCM & Logistics

HYUNDAI  
*AutoEver*

System Integration



## Scalable Physical AI Product



Deployment Ready

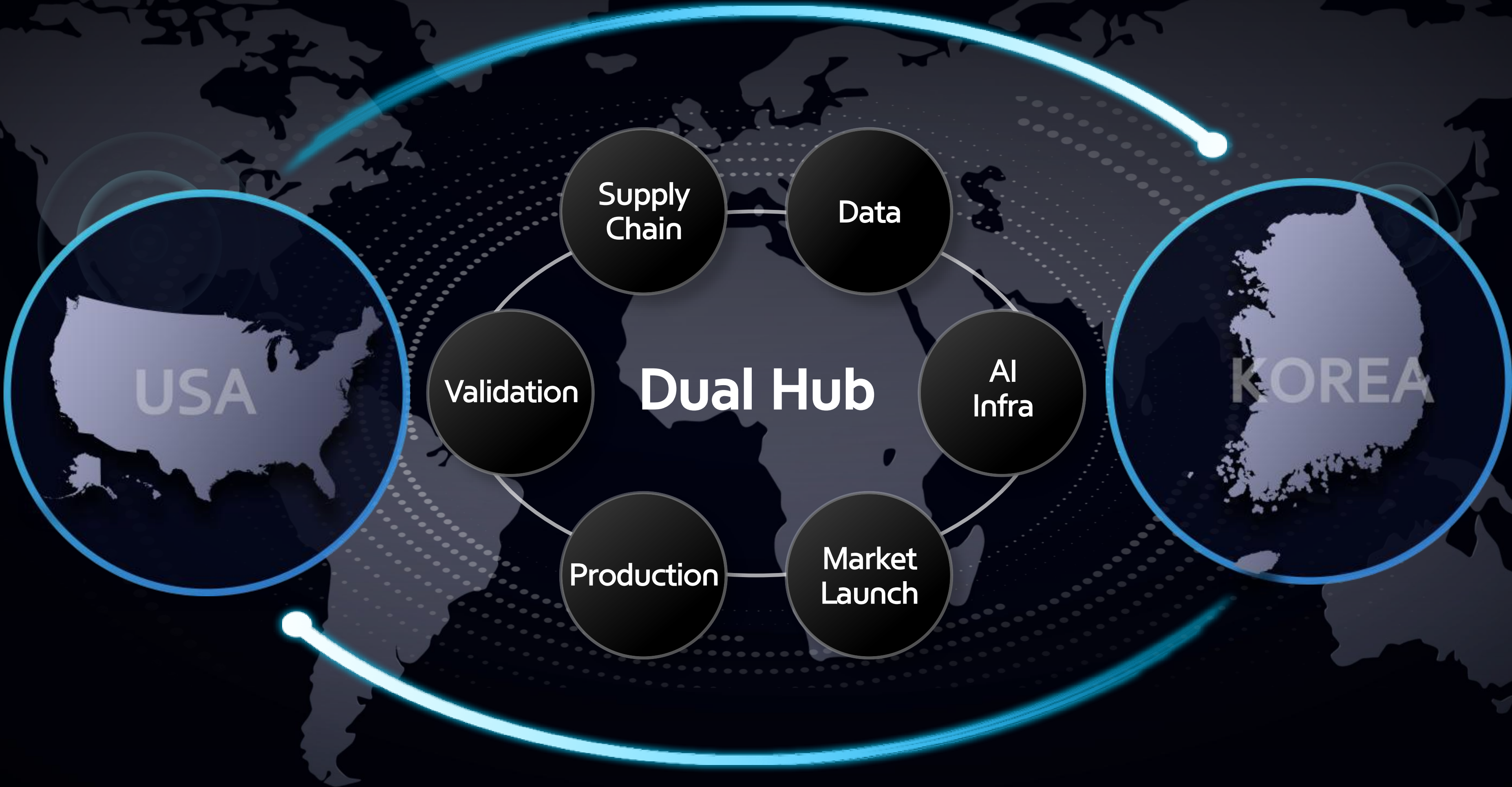
Optimized Cost & Quality

Scalable Production

Real-World Validation

Value Chain Integration

Scalable Deployment



# HMG Value Chain

How HMG turns affiliates into a robotics ecosystem



# HMG Robotics Value Chain

 **HYUNDAI**

**Manufacturing**

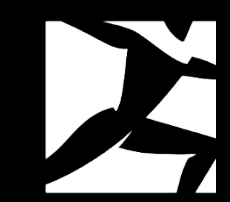
**HYUNDAI  
KEFICO**

**HYUNDAI  
MOBIS**

**Components**

**HYUNDAI  
TRANSYS**

BostonDynamics



**Technology**

**HYUNDAI  
AutoEver**

**System Integration**

**HYUNDAI  
STEEL**

**Hyundai Capital**



**Manufacturing**

**HYUNDAI  
WIA**

**HYUNDAI  
GLOVIS**

**Logistics**

**HYUNDAI  
Rotem**

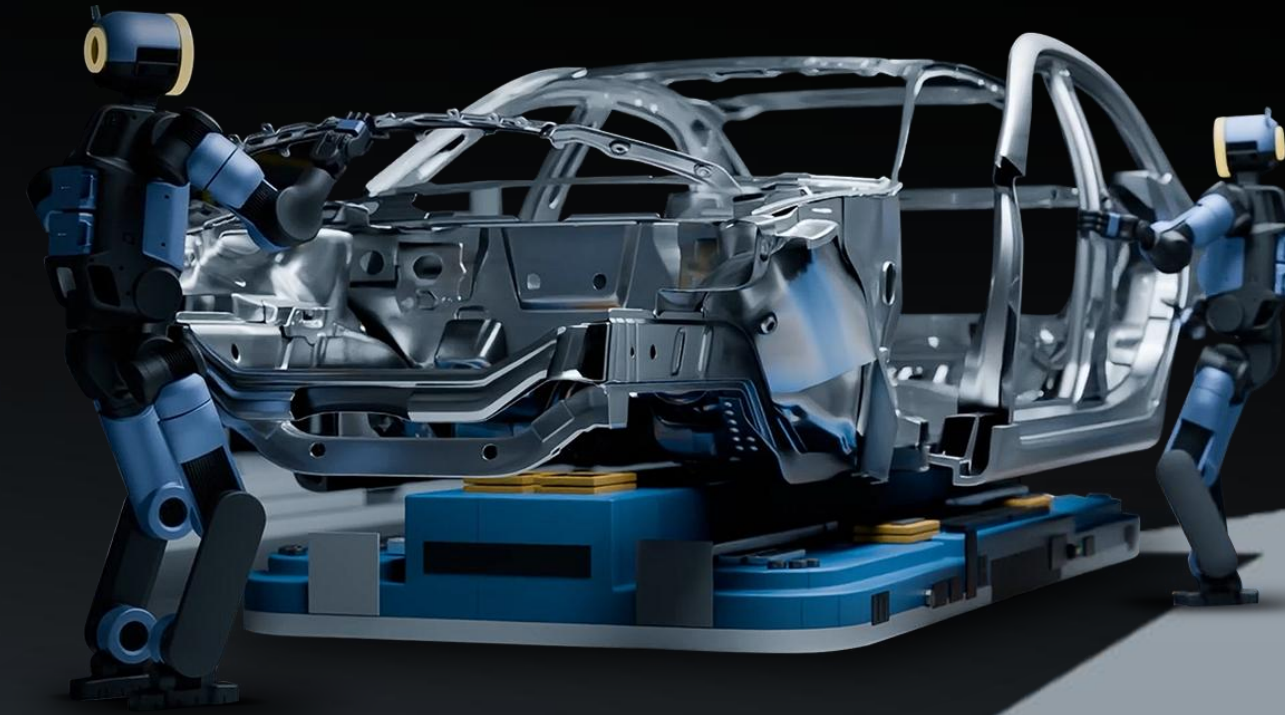
# From Factory Floor to Global Scale



# 25,000+ Units of Captive Demand



Assembly Work



Rapid Expansion to Multiple Industries

# Core Component Partner

From Component Supplier to Strategic Robotics Partner

## Strategic Position

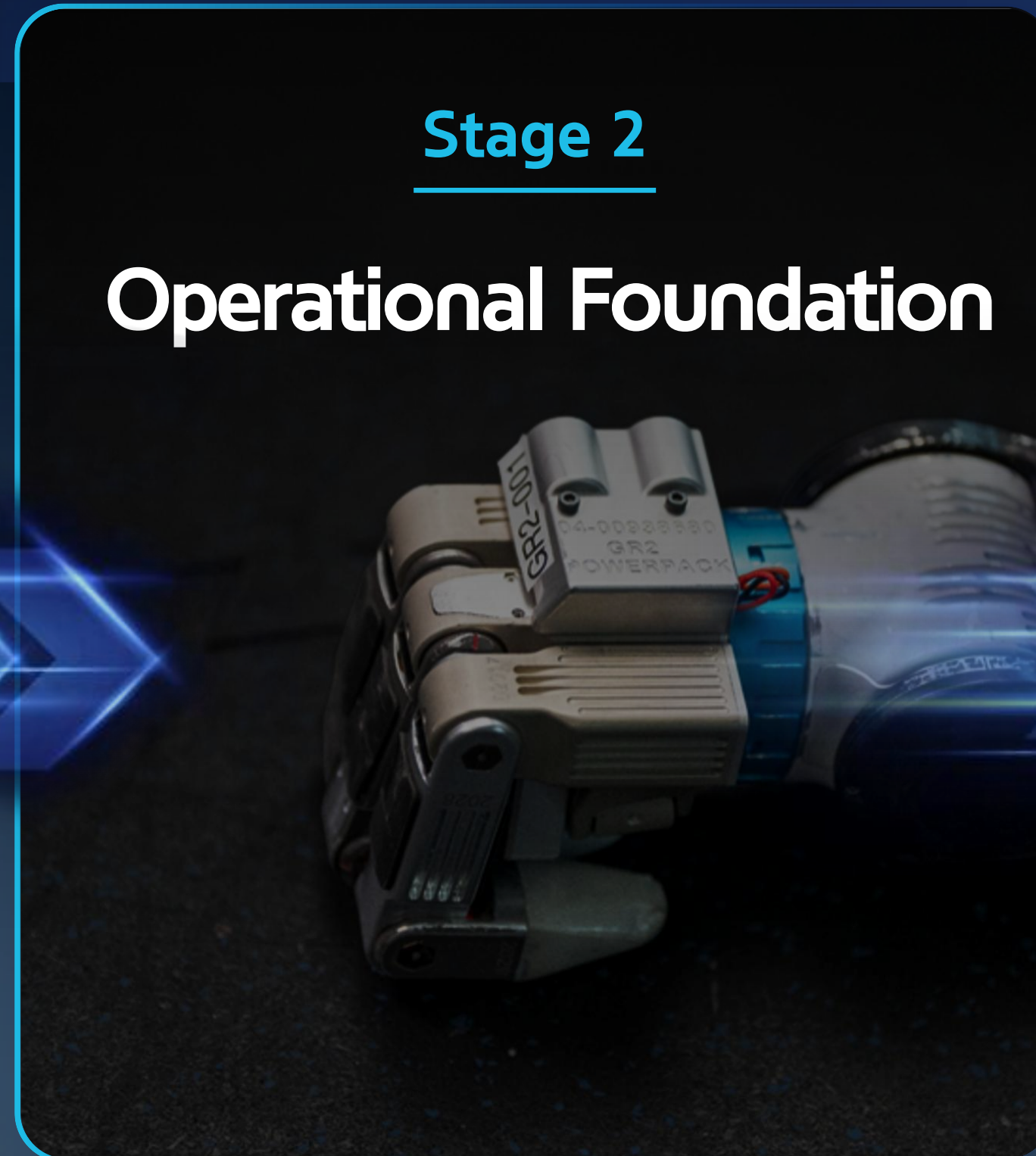
Stage 1

**Internalization**



Stage 2

**Operational Foundation**



Stage 3

**Competitive Advantage**

Performance

Cost  
Quality



# Supply Chain Management Backbone & Test Bed

## SCM Backbone

Sales  
Logistics

Production  
Logistics

Procurement  
Logistics

## Logistics Testbed

Field Adaptability

Safety & Reliability

Productivity

# Data-driven System Integration Flywheel

Smart Factory Optimization



Accelerated Value Creation

Data Collection & Management

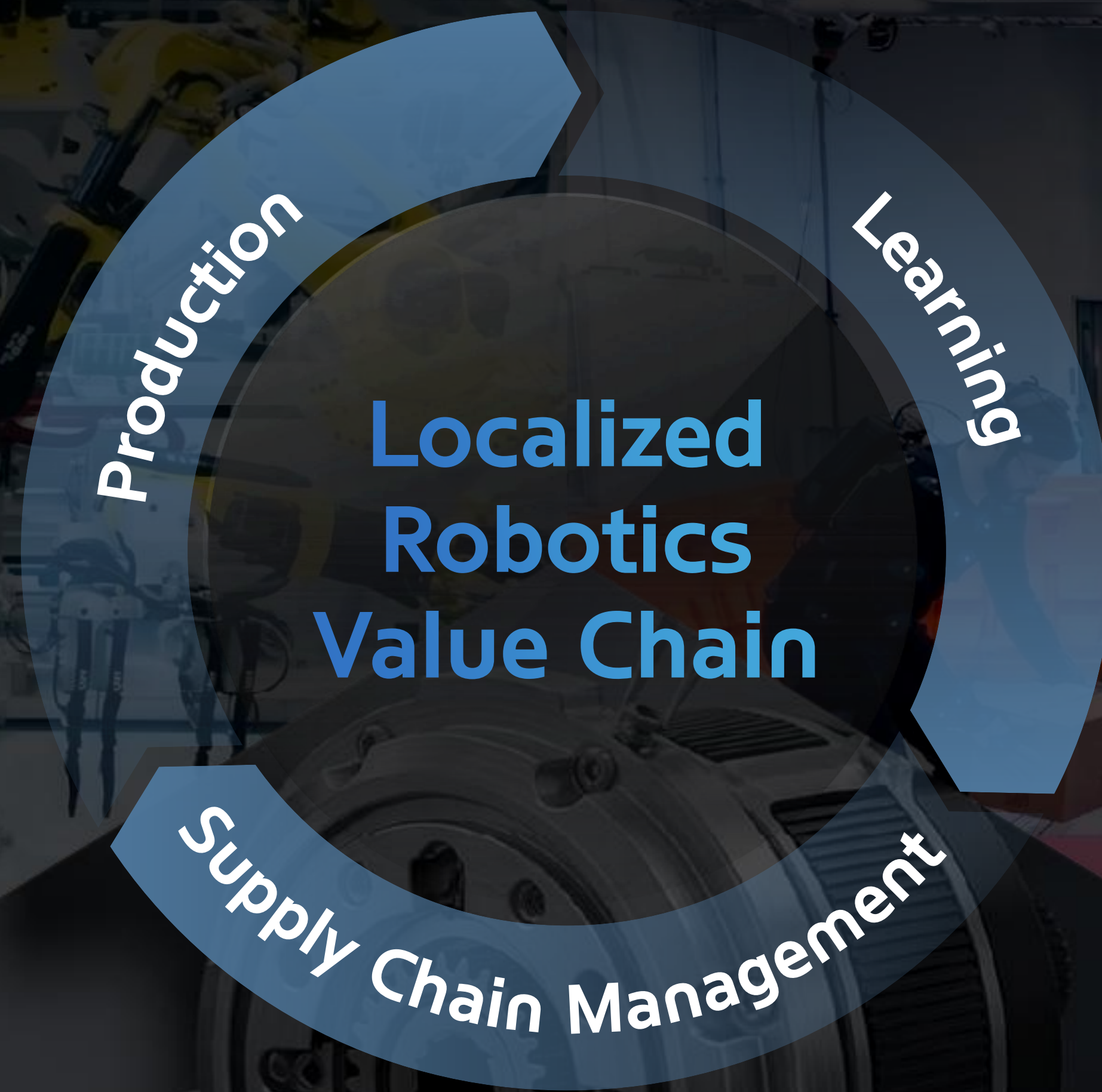
Data-enabled Robot Intelligence Improvement

# US Robotics Value Chain

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Where the integrated value chain is deployed first and largest.

**Robotics in  
America**



**Robot  
Metaplant  
Application  
Center**

**Actuator  
Manufacturing Facility**

# Mass Production Platform with Flexible Manufacturing

## Robot Friendly Engineering



Design for  
Manufacturing



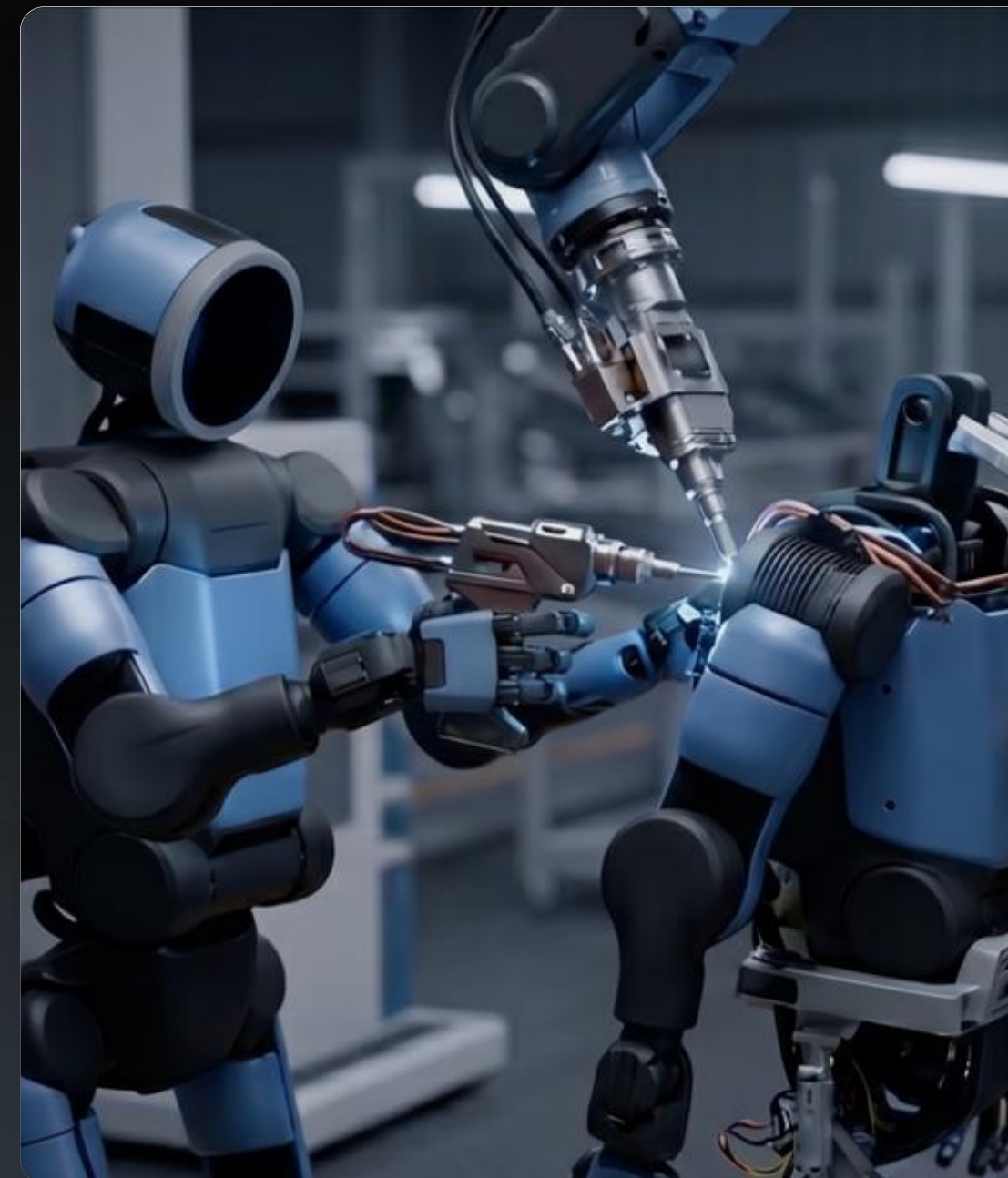
Advanced  
Manufacturing  
Partnership



Operational  
Efficiency



## Robot by Robot Production



Mass Production Facility for Diverse Robots

# Planned Launch: 2028

Initial Capacity: 30,000 units/year

RA

RMAC

Robot Metaplant Application Center

Actuator  
Manufacturing Facility

# Real-World Training Hub

## Continuous Workflow for Advancing Robot Physical AI

Millions of Hours of Data Accumulation



Data collection, learning center for AI

# Planned Launch: 2026 Summer

Located within HMG Metaplant America, GA



RA

RMAC

Actuator  
Manufacturing Facility

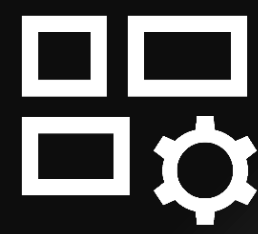
# Core Component Internalization



Lowering core  
component supply risk



Cost and Quality  
Direct Management



Future Component  
Scale-up

Core Component Manufacturing Plant

## Planned Launch: 2028

Capacity: 350,000 + units/year

Actuator E2E Value Chain Completion  
From Parts Development to Final Supply



R&D



Production



Supply



# Vertical Integration



Proven Use-case

# Horizontal Expansion



**Vertical Integration**

**Core  
Value Chain**

**Execution  
at Scale**

**Horizontal Expansion**

**Proven  
Use-cases**



**HYUNDAI**  

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**MOTOR GROUP**