The empty cab still has a payroll.

Customer-owned metal does not make offboard support free.

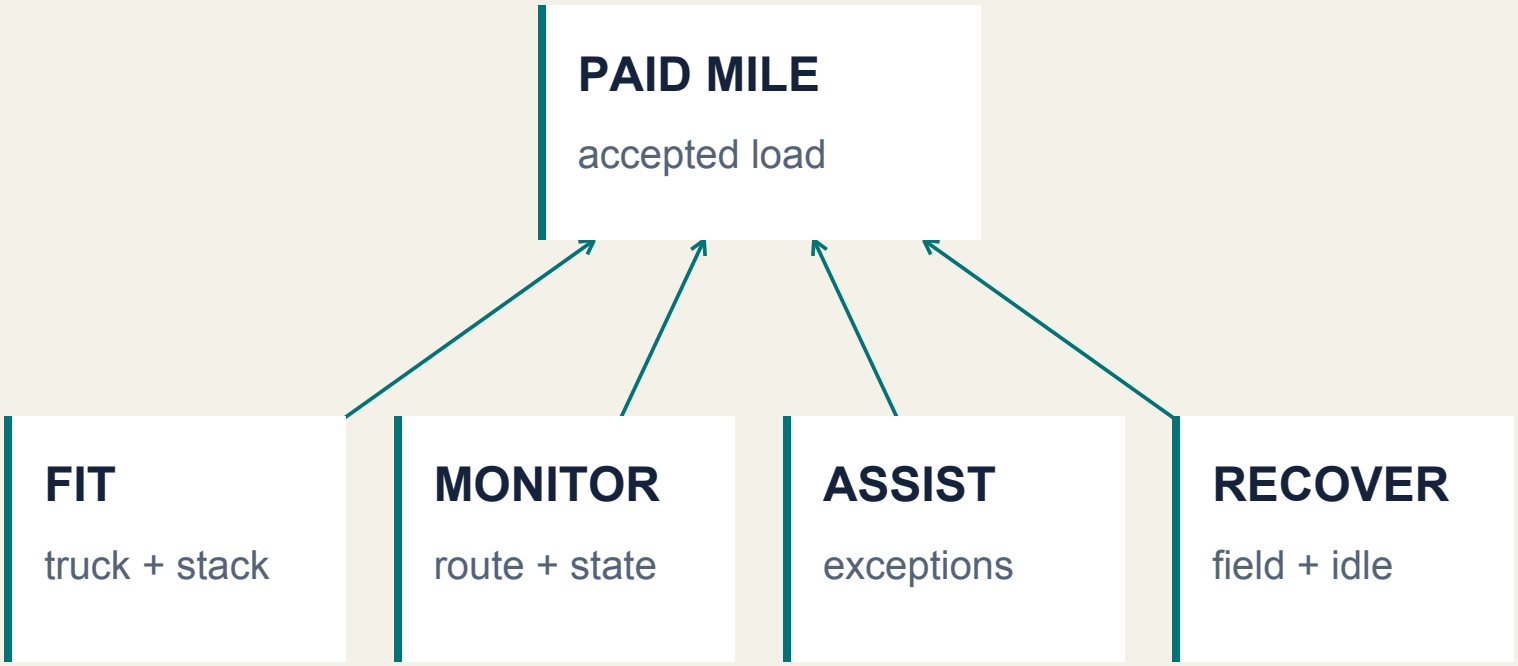
IN THE CAB	OFFBOARD
EMPTY	STAFFED
No driver in the seat	Integrate and monitor
Carrier owns the truck	Assist and maintain
Fee follows miles	Recover exceptions

The public evidence does not disclose DTL-specific support intensity or margin.

> **Asset-light and labor-light are different claims.**

The labor moved offboard.

A paid mile sits inside a support system, even when nobody is driving.



Kodiak's filing names integration, monitoring and remote support; this diagram groups the broader economic functions.

> **The truck is visible. The surrounding work is the ledger.**

Put the whole cost in the numerator.

A per-mile fee creates a per-mile economic test.

$$\frac{\text{Revenue} - \text{full provider cost}}{\text{Accepted paid miles}}$$

Revenue → price, minimums and accepted miles

Service → hardware, cloud, monitoring and assists

Tail → downtime, maintenance and recovery

> **Truck count is not the denominator investors need.**

Assist counts can hide the workload.

Minutes per accepted paid mile expose duration as well as frequency.

ASSIST-MINUTES PER PAID MILE



Standby coverage, handoffs, training and field recovery are excluded from both illustrations.

The second hypothetical burden is 40× larger.

Robin framework | Illustration · not Kodiak or DTL data

Do not spend one proof twice.

Commercial intent, operation and economics are separate milestones.

EVIDENCE	WHAT IT SUPPORTS	WHAT IT DOES NOT
75 contracted	Commercial intent	Delivery or margin
35 owned trucks	Model operates elsewhere	DTL economics
Paid mile series	Operation at DTL	Profit without costs

The first accepted DTL paid mile and a support-adjusted margin series are not in the reviewed public evidence.

> **Thirty-five trucks elsewhere do not reveal DTL margin.**

Ask for the offboard ledger.

Five measures can turn an impressive deployment into an economic record.

01

1 · Output

Accepted paid miles and loads, not availability alone.

02

2 · Assists

Events and minutes per 1,000 accepted miles.

03

3 · Downtime

Safety stops, unavailable hours and field recoveries.

04

4 · Full cost

Integration, monitoring, maintenance and idle time.

05

5 · Return

Continuation, renewal or expansion after real use.

Define each measure prospectively so ordinary and exceptional states are not merged.

Count accepted output and every support layer required to produce it.

The cab is empty. The question is full.

Does accepted mileage outrun the complete support cost around it?

VISIBLE BREAKTHROUGH

Is the driver's seat empty?

Does each accepted mile earn after full support?

Track the paid mile and the offboard minute on the same ledger.

Company figures attributed · Illustration labeled · DTL economics UNKNOWN

> **The payroll around the breakthrough decides whether it compounds.**