

Week commencing 3 August 2026

COVERAGE

27 July — 6 August 2026

AUDIENCE

Transport, infrastructure and technology leadership

HANDLING

Internal use — not for onward distribution

IF YOU JUST REMEMBER ONE THING FROM THIS BRIEFING...

London now has a licensed, human-supervised robotaxi on its streets — and the loudest response was a union warning, not a passenger queue.

On 5 August Transport for London issued the capital's first robotaxi private hire licences, to Uber and Wayve, for 15 supervised vehicles — three days after Baidu's Apollo Go began safety-driver testing in Brent for FreeNow. Within 24 hours the GMB union and the London Assembly Transport Committee had put job losses, liability and a 42–29 public opposition margin on the record. Ask your London-facing team: does our current guidance to staff and clients still describe reality accurately?

THIS WEEK

Trials, regulation and sentiment

PRIORITY

5 AUG

TfL grants London's first robotaxi licences, to Uber and Wayve

TfL licensed up to 15 Wayve-equipped Ford Mustang Mach-E vehicles as private hire cars, each with a supervising PHV driver, for a one-year trial. Uber says 100,000-plus have joined its waitlist.

So what: a regulatory first, not a driverless launch — the safety driver still does the legal work.

PRIORITY

5–6 AUG

GMB and London Assembly put jobs, safety and liability on the record

GMB called the licence "a worrying development" and cited its own estimate of 300,000 driving jobs at risk nationally. The London Assembly Transport Committee backed caution, citing its own poll (below).

So what: political and industrial pushback is running alongside the approvals, not behind them — treat it as a live constraint on rollout, not background noise.

PRIORITY

28–29 JUL

Baidu's Apollo Go and FreeNow start robotaxi road tests in Brent

Apollo Go's RT6 vehicles began safety-driver testing on Brent's streets under the Baidu–Lyft–FreeNow partnership. No passengers yet; commercial service is targeted for 2027, pending approval.

So what: London is now a genuine multi-operator contest — judge partners on integration and liability discipline, not on who announces first.

WATCH

FIELDWORK
12–19 JUN

Londoners oppose robotaxis by 42 to 29 per cent, YouGov finds

YouGov polled 1,053 London adults for the London Assembly Transport Committee, 12–19 June 2026: 42% opposed autonomous taxis, 29% supported them. Not this week's data, but the figure both GMB and the Assembly cited this week.

So what: opposition is a plurality, not a majority — but it is the number every political response now anchors to.

WATCH

22 APR,
UNRESOLVED

Waymo's Harlesden police-cordon incident still generating local pressure

A Waymo test car under a human "validation driver" drove through a live police cordon on 22 April; the driver was suspended. Brent Green Party's pause petition remains open, unresolved.

So what: one high-profile incident can outlast its news cycle as durable local opposition — track borough positions, not just national polling.

PIPELINE

What to expect in the next twelve months

OPERATOR OR AUTHORITY	CITY OR JURISDICTION	MILESTONE OR DECISION	DATE OR EXPECTED DATE
Uber & Wayve	London	First supervised passenger rides for waitlisted users.	Summer 2026
Apollo Go / FreeNow	London (Brent)	Safety-driver testing continues; commercial service targeted.	2027 (target)
Waymo	London	Safety-driver testing continues; launch date not confirmed.	2026, unconfirmed
Uber / WeRide	Madrid	Staged robotaxi pilot — company-stated, not regulator-confirmed.	Late 2026 (stated)
Uber / Momenta	Munich	Level 4 autonomy road testing.	2026
CCAV / DfT	UK-wide	Draft NUIC-operator and ASDE licensing regulations.	Q3–Q4 2026

Company-stated dates are intent, not commitment, until confirmed by a regulator. Fully driverless UK passenger services are not permitted before the AV Act's full framework, expected late 2027.

REGULATORY AND SECTOR WATCH

What changed, and what is coming

In force now

- AV Act 2024 permits pilot services with a supervising safety driver from spring 2026 — the basis for this week's London licences.
- TfL private hire licensing is the interim route ahead of the dedicated no-user-in-charge (NUIC) regime.

Approaching

- CCAV draft NUIC-operator and ASDE licensing regulations due Q3–Q4 2026, with a further consultation.
- Seventeen European transport ministers signed a declaration on 8 June 2026 on common cross-border AV testing principles; no implementing measures yet.

Standing watch — insurance and liability. Insurers still want detail on NUIC/ASDE data-sharing duties before pricing supervised fleets. These PHV licences sit under ordinary motor insurance, since a human supervisor remains legally responsible.

RECOMMENDED

Three things to do before next Monday

- Correct any staff guidance still describing London robotaxis as “not yet operating” — they now are, under supervision.
- Brief clients with London taxi, PHV or fleet exposure on the GMB and Assembly positions before they hear it elsewhere.
- Watch for a second borough- or Assembly-level intervention beyond Brent — a second would mark a pattern worth escalating.

OUTLOOK — NEXT SEVEN DAYS

We assess it is likely that at least one further London operator — Waymo or a Baidu/FreeNow partner — will confirm a supervised-passenger milestone, given the competitive pressure created by the Uber/Wayve licence. It is a realistic possibility that the GMB or a London borough escalates from public statements to a formal call for a TfL or Mayoral review. We assess it is unlikely that any UK operator moves to a genuinely driverless London service before the AV Act's full framework takes effect in late 2027.

NEXT EDITION

Monday 10 August 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

