

Week commencing 31 August 2026

COVERAGE

17 – 30 August 2026

AUDIENCE

Transport, infrastructure and technology leadership

HANDLING

Internal use — not for onward distribution

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

While Munich, Madrid and Zagreb accelerate, London's own robotaxi timeline keeps sliding toward 2027.

Waymo named Munich its first EU robotaxi city this fortnight and registered entities in Spain, France, the Netherlands and Switzerland. Pony.ai and Uber are scaling past Zagreb toward 2,000 European robotaxis. London still has no driverless guidance from TfL, which says there is "no rush" to publish it. Ask your team: which market actually moves first?

THIS FORTNIGHT

Trials, regulation and sentiment

PRIORITY

25 AUG

Waymo confirms Munich as its first EU robotaxi city

Waymo announced Munich as its first European Union robotaxi market, targeting public service by end of 2027. Validation-driver testing starts within weeks across several Munich districts. Waymo has also registered legal entities in Spain, France, the Netherlands and Switzerland but holds zero German driving permits so far.

So what: Munich, not London, is now Waymo's most advanced European bet — watch whether Bavarian and KBA approvals arrive faster than TfL's own guidance.

PRIORITY

27 AUG

London robotaxi rollout slips toward 2027 as TfL says "no rush"

TfL's director of strategy Christina Calderato said there is "no rush" to publish the guidance operators need before seeking driverless consent. No operator has completed the first regulatory stage. A YouGov poll for the Assembly found 42% of Londoners oppose autonomous taxis against 29% in support (fieldwork June, published July).

So what: fully driverless UK rides before 2027 are now unlikely — Waymo, Wayve and Baidu all remain in the supervised phase, and TfL controls the pace, not the operators.

WATCH

14 AUG,
UNRESOLVED

Pony.ai and Uber plan over 2,000 robotaxis across Europe

Reported just before this fortnight but still unresolved: Uber and Pony.ai said they will expand beyond Zagreb (with Verne) to over 2,000 robotaxis across four further European cities. Neither has named the cities or given a deployment timetable.

So what: scale is shifting from single-city pilots to continental rollout plans — track which cities are named next, since that will set the competitive map for UK operators.

WATCH

10 AUG,
CHECKED THIS
WEEK

"Stop the Robocabs" petition stalls well short of its threshold

The Private Hire & Taxi Driver's Network petition against driverless taxi licences, published 10 August, remained near 1,100 signatures when checked this week — far short of the 10,000 needed for a government response. Organised union opposition (GMB, ADCU) has been louder than public sign-up.

So what: read this as a gap between organised trade opposition and grassroots public sign-up — plan communications on the union channel, not the petition threshold.

PIPELINE

What to expect in the next twelve months

OPERATOR OR AUTHORITY	CITY OR JURISDICTION	MILESTONE OR DECISION	DATE OR EXPECTED DATE
Waymo	Munich	Validation-driver testing starts; KBA/Bavarian permits still needed.	Public service end of 2027 (stated)
Uber & Wayve	London	Early rider access under the Interest List.	Later summer 2026 (stated), unconfirmed
Apollo Go / Freenow	London (Brent)	Safety-driver testing continues.	Public rides targeted 2027
Pony.ai / Uber	Four further EU cities (tbc)	Robotaxi deployment beyond Zagreb.	Cities and dates not yet named
TfL	London	Publish driverless APS guidance for operators.	No date set

Company-stated dates are intent, not commitment. No UK operator has completed the first driverless regulatory stage.

REGULATORY AND SECTOR WATCH

What changed, and what is coming

In force now

- APS Permits Regulations 2026 in force since 15 May; DVSA can grant Part 5 permits — none issued.
- Wayve/Uber hold 15 PHV licences for supervised trips under the AV Trialling Code of Practice, since 5 August.
- UNECE WP.29 Level 4 framework adopted June 2026, with UK, EU, US, China and Japan support.

Approaching

- TfL's own driverless-service guidance — no publication date given.
- Waymo/KBA Munich permit talks — no German AV permits held yet.
- Stop the Robocabs petition needs 10,000 signatures for a formal government response.

Standing watch — independent AV safety oversight. Neither the UK's Road Safety Investigation Branch nor an EU Road Safety Agency is yet operational. ETSC continues pressing Brussels for mandatory collision reporting. No change this fortnight.

RECOMMENDED

Three things to do before the next edition

- Confirm client guidance no longer promises 2026 London driverless rides — supervised trials are the only live UK service.
- Track TfL's guidance publication date directly — "no rush" from TfL is itself the finding to report.
- Watch which cities Pony.ai and Uber name next for their 2,000-robotaxi European expansion plan.

OUTLOOK — NEXT FORTNIGHT

We assess it is unlikely TfL grants a driverless APS permit to any operator within the fortnight. It is a realistic possibility Pony.ai and Uber name at least one further city. Waymo's German permit process is likely to continue without approval before the next edition.

NEXT EDITION

Monday 14 September 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

