

Week commencing 14 September 2026

COVERAGE

31 August — 13 September 2026

AUDIENCE

Transport, infrastructure and technology leadership

HANDLING

Internal use — not for onward distribution

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

London's first robotaxi is now real — but a driver is still legally in charge of it.

On 2 September, Uber and Wayve began carrying fee-paying passengers in London, the headline moment this fortnight. Every journey still carries a licensed driver responsible for the car; TfL has issued no fully driverless consent, and GMB is now demanding a worker-protection plan before any expansion. Ask your team: are we calling this a robotaxi, or what it is — a supervised trial with a driver in charge?

THIS FORTNIGHT

Trials, regulation and sentiment

PRIORITY

2 SEP

Uber and Wayve launch London's first public robotaxi rides

Uber began matching UberX bookings to Wayve-equipped Ford Mustang Mach-Es under a TfL trial approving up to 15 vehicles; fewer than 20 launched. Wayve's system uses no lidar, HD map or geofence. A licensed driver remains aboard and legally responsible throughout, since DVSA has granted no fully driverless permit.

So what: this is a supervised commercial debut, not driverless service. Correct client messaging now, before "robotaxi" coverage sets the wrong expectation.

PRIORITY

SEP

GMB demands driver-protection plan as launch lands

GMB warned the rollout threatens over 300,000 taxi and private-hire driving jobs and called on TfL and government for a protection plan before expansion. Separately, TfL's Christina Calderato told the Assembly it would not accept fully driverless applications "for some time."

So what: union pressure is now running alongside the commercial launch, not behind it — expect driver-protection asks to feature in any future permit debate.

WATCH

LATE AUG,
ONGOING

Waymo begins manual-drive mapping across Munich

Following its 25 August announcement, Waymo vehicles started manually driven mapping runs across Maxvorstadt, Au-Haidhausen and Ludwigsvorstadt-Isarvorstadt, gathering data ahead of driverless testing. Waymo still holds zero German AV permits; public service remains targeted for end of 2027.

So what: mapping is preparation, not approval — track whether Bavarian and KBA permits arrive before London's own guidance does.

WATCH

MID-AUG,
UNRESOLVED

Pony.ai and Uber still have not named their four further cities

The mid-August plan for over 2,000 robotaxis across four further European cities beyond Zagreb remains unresolved this fortnight — no cities or timetable disclosed, with further detail promised in phases.

So what: scale plans without named cities are intent, not commitment — hold off briefing clients on specific markets until Pony.ai and Uber confirm one.

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	Supervised commercial rides live; DVSA permit needed for driverless.	Live since 2 Sep; no driverless date
Waymo	Munich	Manual mapping under way; KBA/Bavarian permits still needed.	Public service end of 2027 (stated)
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.	"Not for some time" — no date set

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

REGULATORY AND SECTOR WATCH

What changed, and what is coming

In force now

- Uber/Wayve hold TfL consent for up to 15 supervised vehicles under the AV Trialling Code of Practice, live since 2 September.
- APS Permits Regulations 2026 in force since 15 May; DVSA can grant Part 5 permits — none issued.

Approaching

- TfL's driverless-service guidance — Calderato says applications won't be accepted "for some time."
- Waymo/KBA Munich permit talks — no German AV permits held yet.

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

- Track whether Uber/Wayve's London service records any incident or intervention in its first weeks.
- Confirm client guidance separates this supervised launch from any future fully driverless service.
- Watch GMB and TfL talks for driver-protection conditions ahead of any APS permit decision.

OUTLOOK — NEXT FORTNIGHT

We assess it is likely Uber and Wayve expand their London fleet beyond 20 vehicles if the supervised launch proves stable. It is a realistic possibility Waymo's Munich mapping phase completes without a KBA permit before the next edition, and likely GMB pressure grows before TfL publishes any guidance.

NEXT EDITION

Monday 28 September 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

