

Week commencing 12 October 2026

COVERAGE

28 September – 11 October 2026

AUDIENCE

Transport, infrastructure and technology leadership

HANDLING

Internal use — not for onward distribution

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

Four months after the permit scheme opened, DVSA has issued zero driverless passenger permits.

The Automated Passenger Services regime has been in force since 15 May, but no operator has been granted a permit to run a driverless passenger service anywhere in Great Britain. Uber and Wayve's London pilot, like every other UK trial, still runs with a safety driver because no other legal route exists. Ask your team: are we treating any operator's "driverless by" date as fact, or as a claim still waiting on a permit nobody has received?

THIS FORTNIGHT

Trials, regulation and sentiment

PRIORITY

22 SEP

Mercedes-Benz signs production deal to fit Wayve's AI Driver to future cars

Mercedes-Benz and Wayve signed a production deal covering urban and highway driving assistance, built on Mercedes' earlier Series D investment. Mercedes is the first premium manufacturer to commit to Wayve's camera-based system, after earlier deals with Nissan and Stellantis.

So what: Wayve now earns from consumer driver-assistance, not just robotaxi fleets, cutting its dependence on Uber's rollout pace. It is the clearest UK AV export win yet.

PRIORITY

SINCE 15 MAY,
UNRESOLVED

DVSA has granted no automated passenger service permit, four months in

The APS Permits Regulations 2026 took effect in May, but DVSA has issued no permit for a driverless passenger service. Every UK trial, including Uber and Wayve's London pilot and Apollo Go's Brent testing, runs with a human safety driver because no permit exists to remove one.

So what: treat any operator's driverless launch date as aspiration, not fact, until DVSA grants a permit. None has been issued since the scheme opened.

WATCH

14 SEP,
UNCONFIRMED

Waymo's reported Berlin plans stay unconfirmed; Munich is its only declared city

Berlin Senate documents reported by Manager Magazin and Spiegel describe Waymo preparing to map the city and test up to 50 vehicles this year. Waymo has not confirmed this and holds no KBA Level 4 test or operating permit in either Berlin or Munich.

So what: treat Berlin as unconfirmed reporting, not a second city, until Waymo or the KBA say otherwise. Munich stays the only commitment on record.

PRIORITY

ONGOING

Unions keep pressing TfL and Uber as licences grow, with no fresh poll this fortnight

GMB has called Uber's London rollout "premature" and wants a driver-protection plan before expansion; the App Drivers and Couriers Union remains opposed. No new survey was fielded this fortnight — June's YouGov finding of 42% opposed to 29% in favour among Londoners still stands.

So what: organised driver opposition runs alongside, not behind, measured opinion. Weight client launch communications against both, not just passenger reaction.

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 fleet stays under 20 cars; driverless APS permit still unissued.	No date set
Waymo	Munich	Manual mapping continues; KBA Level 4 test permit still needed.	Public service end of 2027 (stated)
Waymo	Berlin	Reported mapping preparation with up to 50 vehicles; unconfirmed by Waymo.	Testing before end of 2026 (reported)
WeRide & Uber	Zurich	Commercial launch targeted; FEDRO operating-area approval pending.	Later in 2026 (stated)
Apollo Go / Freenow	London (Brent)	Safety-driver road testing continues.	Public rides targeted 2027

Company-stated dates are intent, not commitment. No European operator has completed the fully 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 has issued zero Part 5 permits to date.
- AEVA 2018's insurer-first liability model stays live-tested by Uber/Wayve's supervised London service.

Approaching

- No further European insurer has followed Allianz's 16 September Waymo template yet.
- Volkswagen's ADMT robotaxi unit reportedly lost both Uber and Lyft as prospective investors.

Standing watch — independent AV safety oversight. Neither the UK's Road Safety Investigation Branch nor an EU Road Safety Agency is yet operational. No change this fortnight; both remain unstaffed policy commitments rather than working bodies.

RECOMMENDED

Three things to do before the next edition

- Track whether DVSA issues its first APS permit — the single blocker to any UK driverless launch.
- Watch for Waymo to confirm or deny its reported Berlin plans before citing it as a second city.
- Check whether any client AV pilot has insurance cover comparable to Allianz's Waymo template.

OUTLOOK — NEXT FORTNIGHT

We assess it is likely DVSA still has not issued a first APS permit by the next edition, a realistic possibility Waymo confirms or denies its Berlin plans, and likely that Wayve's Mercedes deal prompts further premium manufacturer interest before a second signs.

NEXT EDITION

Monday 26 October 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

