

Week commencing 26 October 2026

COVERAGE

12 – 25 October 2026

AUDIENCE

Transport, infrastructure and technology leadership

HANDLING

Internal use — not for onward distribution

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

Robotaxi testing just reached a second UK city and a third European country — while Britain's permit office has issued none at all.

Uber's Pony.ai and Verne partnership began mapping Manchester on 14 October; Waymo confirmed Madrid as its next market on 20 October. Both run ahead of any legal route to full driverless service — DVSA has granted zero Automated Passenger Service permits since May. Ask your team: are we tracking operator announcements, or the permits that authorise them?

THIS FORTNIGHT

Trials, regulation and sentiment

PRIORITY

14 OCT

Uber, Pony.ai and Verne begin robotaxi testing in Manchester

Uber announced on 14 October that Pony.ai's Gen-7 vehicles, run locally by Verne, are mapping Manchester with a safety driver aboard. No fleet size, test area or route is disclosed, and no application to run driverless taxis there has been made.

So what: Manchester becomes the UK's second robotaxi city before London's rollout is fully driverless. Expect the same consent questions to follow, without the capital's scrutiny.

PRIORITY

20 OCT

Waymo confirms Madrid as its next European market

Waymo announced on 20 October that Madrid, Alcobendas and Getafe will be its first Spanish cities, under DGT instruction VEH 2025/07. Manual mapping starts at once, then supervised testing; public rides are targeted for 2027. No operator or fleet size is named.

So what: Madrid is Waymo's third European commitment, alongside Munich and London, ahead of any confirmed Berlin plan. Treat 2027 as intent, not a regulatory date.

PRIORITY

12 OCT

London Assembly says it is not convinced robotaxis are ready for the capital

The Transport Committee's 12 October report wants TfL, not DVSA alone, able to cap operator fleets, suspend permits within hours and require 24-hour crash reporting. It notes DVSA has issued zero Automated Passenger Service permits in the five months since the regime opened on 15 May.

So what: a cap on fleet size is now a live political ask, not a fringe position. Factor permit suspension and fast crash reporting into any client AV programme now.

WATCH

17 OCT

Drivers' union protests at Wayve's offices, echoing the Assembly's findings

About twenty ADCU members protested outside Wayve's north London offices on 17 October over jobs, safety and congestion; one driver said he felt like "an old car that's not needed any more." No new poll appeared this fortnight — June's YouGov figure, 42% opposed to 29% in favour, still holds.

So what: organised opposition and regulatory scepticism now point the same way. Measured opinion has not moved since June — weigh that against the week's protest headlines.

PIPELINE

What to expect in the next twelve months

OPERATOR OR AUTHORITY	CITY OR JURISDICTION	MILESTONE OR DECISION	DATE OR EXPECTED DATE
Waymo	Madrid, Getafe, Alcobendas	Manual mapping under way; supervised testing next.	Public rides 2027 (stated)
Uber, Pony.ai & Verne	Manchester	Safety-driver mapping; no local consent application filed yet.	No date set
Uber & Pony.ai	London	Gen-7 testing announced 8 Oct; fleet size undisclosed.	"Coming weeks" (stated)
WeRide & Uber	Zurich / Madrid	Fare-paying service with safety drivers targeted; FEDRO approval pending.	December 2026 (stated)
DVSA	England, Scotland, Wales	Zero Automated Passenger Service permits granted.	None issued to date

Company-stated dates are intent, not commitment. No UK or European operator has reached 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 none in five months.
- DGT instruction VEH 2025/07 is the legal basis for Waymo's new Madrid testing.

Approaching

- Government response to the London Assembly's 13 recommendations, including the fleet cap, is awaited.
- Momenta's Germany-wide KBA test permit still needs a defined Munich operating area before any passenger service.

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.

RECOMMENDED

Three things to do before the next edition

- Read the London Assembly's 13 recommendations and check whether any mirror your own client's operating conditions.
- Watch whether Uber's Manchester mapping prompts a local consent application before any supervised passenger trial.
- Check that AV-exposed clients hold insurance comparable to the Allianz-Waymo template, now three operators need European cover.

OUTLOOK — NEXT FORTNIGHT

We assess it is likely DVSA still has not issued an Automated Passenger Service permit by the next edition, a realistic possibility the government responds to the London Assembly's report, and likely that a third UK city is named for robotaxi testing before passenger trials begin outside London.

NEXT EDITION

Monday 9 November 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

