Week commencing 9 November 2026

ClearPath Partnership

COVERAGE
26 October – 8 November 2026

AUDIENCE
Transport, infrastructure and technology leadership

HANDLING
Internal use — not for onward distribution

IF YOU JUST REMEMBER ONE THING FROM THIS BRIEFING…

Waymo is preparing to run London on its own app just as its US split from Uber turns public — and Britain still has no permit route open for either model.

Waymo told Uber on 4 November it will end their exclusive deal in two US cities, the clearest sign yet it means to compete, not just partner, in markets including London. DVSA's own permit portal has meanwhile stopped taking new applicants. Ask your team: which operating model are we underwriting for — and does either have a legal route to driverless yet?

THIS FORTNIGHT

Trials, regulation and sentiment

PRIORITY

4 NOV

Waymo's split from Uber hardens, sharpening its go-it-alone plan for London

Waymo told Uber on 4 November it will open its own app in Austin and Atlanta from January 2028, ending exclusivity there; Uber's shares fell 4.3%. Waymo is pursuing the same standalone model in London with fleet partner Moove, against Uber's hybrid roster of Wayve, Pony.ai/Verne and Momenta.

So what: the US rift is a preview, not a UK event. Whether Waymo or Uber's platform model wins will decide how fragmented the UK market becomes.

PRIORITY

CURRENT

DVSA stops taking new applicants for its automated taxi permit scheme

DVSA's Automated Passenger Service portal now states it is "no longer accepting new account creations" and will engage industry before reopening, with no date given. The freeze lands on top of zero permits issued in the near six months since the regime opened on 15 May.

So what: clients cannot even register for a UK driverless permit at present, let alone apply. Park any 2026 permit assumption in client planning.

WATCH

OCT

Manchester mapping continues with no passenger route lodged

Transport for Greater Manchester has confirmed no consent application has been filed for Uber, Pony.ai and Verne's Manchester testing, which began 14 October with safety drivers. No fleet size or timetable has been disclosed since.

So what: Manchester remains a mapping exercise, not a second robotaxi city. Treat "testing" coverage with more scepticism than "launch" headlines imply.

WATCH

ONGOING

UK steers away from the new UN driverless-vehicle rulebook

UNECE's global technical regulation and UN Regulation 185 for automated driving systems took effect in late July, but the UK's August type-approval consultation did not propose adopting it, even as EU states move toward alignment. No new UK position this fortnight.

So what: a UK-EU type-approval gap is opening just as Waymo and Uber's partners plan multi-country rollouts. Watch for friction wherever a vehicle needs both approvals.

PIPELINE

What to expect in the next twelve months

OPERATOR OR AUTHORITY	CITY OR JURISDICTION	MILESTONE OR DECISION	DATE OR EXPECTED DATE
Waymo	London	Pursuing own-app model with Moove; no UK permit route confirmed.	Q4 2026 target (stated)
Waymo	Austin & Atlanta (US)	Ends Uber app exclusivity; launches standalone app.	January 2028 (stated)
DVSA	England, Scotland, Wales	APS permit scheme closed to new accounts; zero issued to date.	No reopening date
Uber, Pony.ai & Verne	Manchester	Mapping continues; no TfGM consent application filed.	No date set
WeRide, Uber & Avomo	Madrid	Commercial pilot targeted; fare-paying, safety driver aboard.	Late 2026 (stated)

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's account system is now also closed to new entrants.
- UNECE's global ADS regulation and UN R.185 in force since late July; the UK has not adopted it into type approval.

Approaching

- Government response to the London Assembly's fleet-cap recommendation remains outstanding.
- Waymo has not disclosed whether it will seek a private hire operator licence or a new regulatory route for London.

Standing watch — public sentiment. No new UK poll this fortnight. June's YouGov figure, 42% opposed to self-driving taxis against 29% in favour, remains the reference point.

RECOMMENDED

Three things to do before the next edition

- Check whether UK-exposed clients already hold a DVSA APS account, since late entrants cannot register.
- Watch whether Waymo names a UK launch partner or permit route before its Q4 target lapses.
- Tell Manchester-based clients that testing there has no passenger timetable, despite "launch" headlines.

OUTLOOK — NEXT FORTNIGHT

We assess it is likely DVSA's APS account freeze persists through the next edition, a realistic possibility Waymo sets out a firmer London timetable as its Uber rift deepens, and unlikely that a formal government response to the London Assembly's fleet-cap recommendation lands before 2027.

NEXT EDITION

Monday 23 November 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

ClearPath Partnership