Week commencing 23 November 2026

ClearPath Partnership

COVERAGE	AUDIENCE	HANDLING
9 – 22 November 2026	Transport, infrastructure and technology leadership	Internal use — not for onward distribution

IF YOU JUST REMEMBER ONE THING FROM THIS BRIEFING…

Germany now has a bookable robotaxi service, while the UK's permit route is still shut.

On 18 November, Uber and Momenta let Munich riders book an autonomous ride through the ordinary Uber app — a milestone London has not reached despite supervised pilots since September. DVSA's permit accounts stay shut to new applicants, none issued, and TfL has not published operator guidance. Ask your team which UK launch date on file still has a lawful route to driverless operation.

THIS FORTNIGHT

Trials, regulation and sentiment

PRIORITY

18 NOV

Uber and Momenta open Munich to bookable robotaxi rides

Pre-registered riders around Munich's Olympic Park can now book a Momenta-driven autonomous vehicle through the ordinary Uber app, free, with a safety operator aboard. The pilot runs on Momenta's KBA Level 4 test permit and is Germany's first bookable robotaxi service.

So what: Germany has reached the booking-app milestone the UK is still working toward. Its Passenger Transport Act still bars commercial operation beyond pilots, so this remains a test, not a business.

WATCH

11–18 NOV

Waymo pulls driverless cars off US freeways after a California ban

California's DMV banned Waymo's driverless vehicles from state freeways from 11 November, calling them an "imminent hazard" after cars entered an active roadworks closure and one passed stationary patrol vehicles. Waymo extended the freeway pause to every US market pending a fix.

So what: Waymo underpins London's and Munich's ambitions. A regulator-forced suspension over construction-zone handling hands UK and EU sceptics a safety precedent to cite.

PRIORITY

CURRENT

UK's driverless permit route stays closed; no 2026 launch now credible

DVSA's Automated Passenger Service accounts remain shut to new applicants, with zero permits issued since the scheme opened on 15 May. The Financial Times reports none of Wayve, Waymo or Baidu Apollo Go is likely to run a fully driverless London service this year; TfL has still not published its own guidance.

So what: any "driverless by [date]" claim from a UK operator is currently aspirational. The gating items are DVSA reopening and TfL's guidance, not vehicle readiness.

WATCH

OCT

Private-hire drivers escalate opposition; no fresh poll appears

App Drivers' and Couriers' Union members protested outside Wayve's London premises in October, demanding compensation for displaced drivers. The Licensed Taxi Drivers' Association called the technology "a solution looking for a problem." No new comfort-riding poll has appeared since June.

So what: union action is organised pressure, not measured opinion — a political-risk signal, not evidence of a broader shift in rider sentiment.

PIPELINE

What to expect in the next twelve months

OPERATOR OR AUTHORITY	CITY OR JURISDICTION	MILESTONE OR DECISION	DATE OR EXPECTED DATE
Uber & Momenta	Munich	Pilot opened to bookable rides via the Uber app.	18 Nov 2026
Waymo	US (CA & other states)	Freeway rides suspended pending a fix.	From 11 Nov 2026
DVSA	UK-wide	APS permit accounts reopen to new applicants.	No date set
TfL	London	Publish operator guidance for driverless services.	No date set
WeRide, Uber & AVOMO	Madrid	Commercial pilot begins after Spain's first L4 permit.	Late 2026 (stated)

Company and government dates above are stated targets, not confirmed commitments; none has yet been reached.

REGULATORY AND SECTOR WATCH

What changed, and what is coming

In force now

- UK APS Permits Regulations 2026, in force since 15 May; DVSA's account system remains closed to new entrants.
- Germany's KBA Level 4 test permits allow nationwide urban robotaxi testing; the Passenger Transport Act still bars commercial operation beyond pilots.

Approaching

- Government response to the London Assembly's call for TfL fleet-cap and permit powers remains outstanding.
- Spain's national Level 4 permit for WeRide, Uber and AVOMO covers preparatory work ahead of a planned Madrid launch.

Standing watch — public sentiment. No new UK poll since YouGov's June figure for the GLA (29% comfortable riding, 42% opposed). October's ADCU protest outside Wayve's premises is organised pressure, not a shift in measured opinion.

RECOMMENDED

Three things to do before the next edition

- Ask UK-exposed clients whether their DVSA APS account was created before the freeze, since none can register now.
- Check whether German or Spanish suppliers' robotaxi permits are test-only, since none covers commercial operation yet.
- Brief leadership that Waymo's US freeway ban is a safety precedent UK regulators and sceptics will likely cite.

OUTLOOK — NEXT FORTNIGHT

We assess it is likely that Munich's pilot expands within its existing KBA permit before London publishes operator guidance, and a realistic possibility that Waymo's freeway suspension delays its stated end-of-year ambitions for London and Munich alike. DVSA's permit freeze is unlikely to lift before the next edition.

NEXT EDITION

Monday 7 December 2026. Send additions, corrections or sector intelligence to your ClearPath engagement lead.

ClearPath Partnership