Mobilizing Europe for the autonomous revolution

Europe's Autonomous Mobility Challenge: Closing the Gap in the Global AV Race

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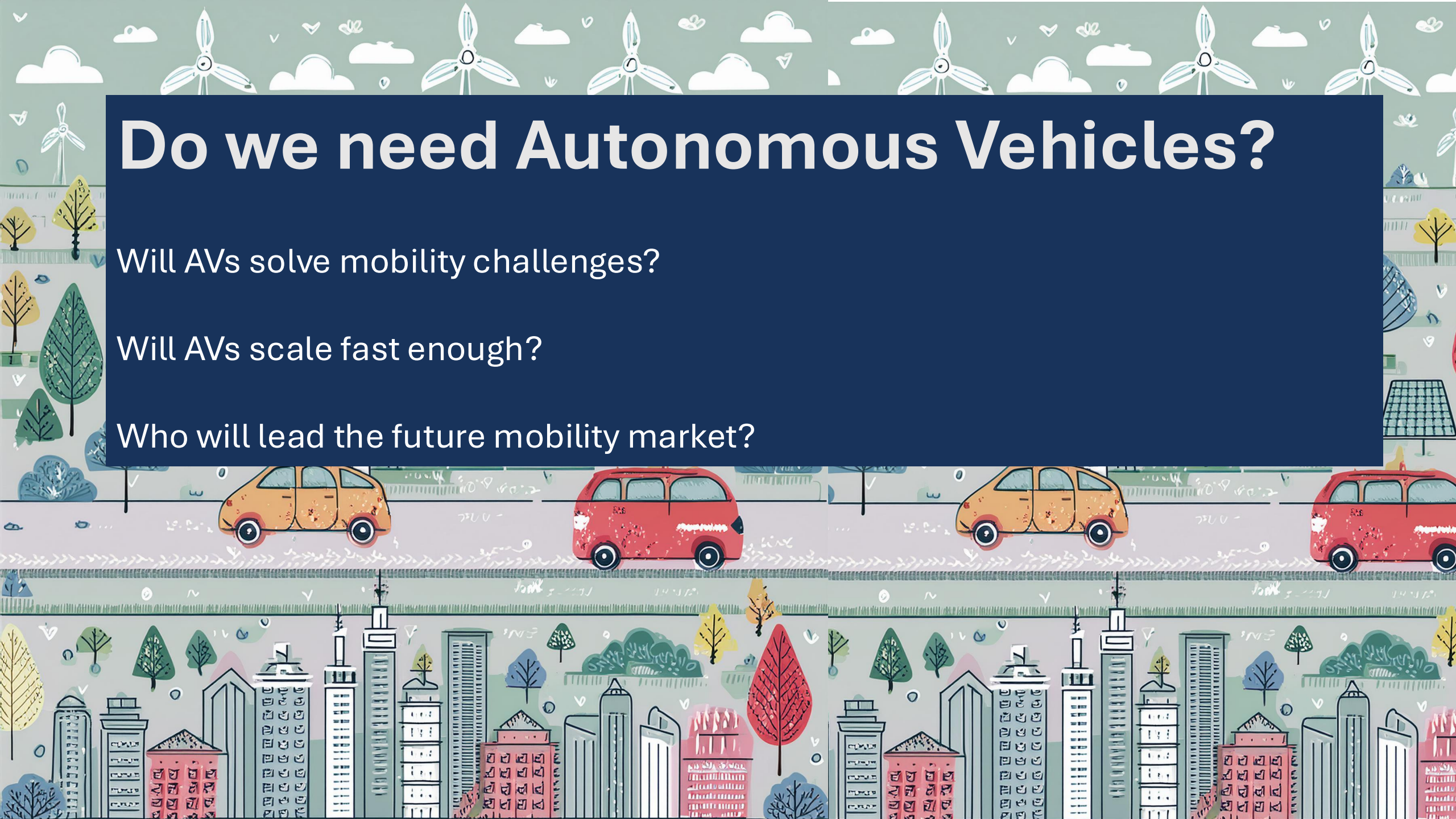
Drive Sweden Forum 2026

Do we need Autonomous Vehicles?

Will AVs solve mobility challenges?

Will AVs scale fast enough?

Who will lead the future mobility market?



The Global Race for Autonomous Mobility

A rapidly evolving ecosystem

Every week brings new permits, deployments and partnerships.

The race has moved from testing to scaling.

WeRide will operate its autonomous Robobus at Roland-Garros for a third consecutive year alongside Renault Group, running a 2.8-kilometer route from May 24 through June 7 with retained night-time service.

MAY 22, 2026

Stellantis Expands Applied Intuition Tie-Up to STLA Brain

Stellantis has expanded its partnership with Applied Intuition to cover STLA Brain, extending the Silicon Valley software firm's role from cockpit into Stellantis' core vehicle OS and autonomy systems.

MAY 21, 2026

Autzu Pivots to Autonomous Operations With San Francisco Hub

Autzu has unveiled a strategic pivot to autonomous operations and is developing an agnostic autonomous hub in San Francisco intended to serve AV developers, robotaxi operators, and fleet owners from shared infrastructure.

MAY 21, 2026

Valeo Wins Fourth Straight GM ADAS Supplier of the Year

General Motors has recognized Valeo as its ADAS Supplier of the Year for the fourth straight time, alongside a separate 2026 award for HVAC systems built in Brazil.

MAY 21, 2026

Stellantis Picks Wayve AI Driver for STLA AutoDrive, 2028 Launch

Stellantis will integrate Wayve's AI Driver into the STLA AutoDrive platform to deliver hands-free, supervised Level 2++ automated driving on highways and urban streets, with first vehicles launching in North America in 2028.

Global Comparison

United States

- Robotaxi services already operating
- Rapid expansion across major cities
- Strong private-sector leadership

Position: Commercialization leader

China

- Large-scale deployment across many cities
- Fast scaling driven by regulation and cost advantages
- High volume of real-world operations

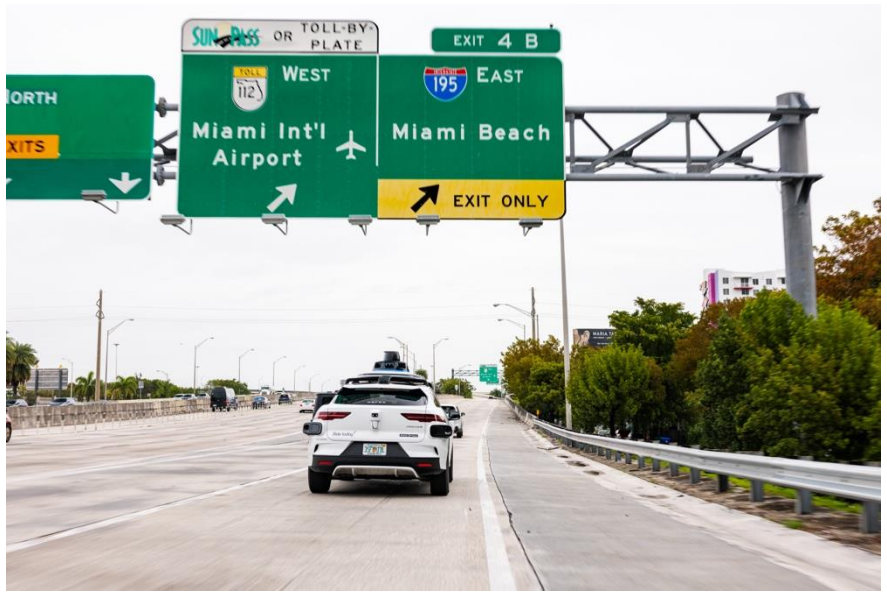
Position: Scaling leader

European Union/UK/CH

- Transition from testing to early rollout (from 2026)
- Strong regulatory framework
- Slower adoption and deployment

Position: Safety & Regulation Leader

USA: Scaling Commercially



Zoox Expands Robotaxi Service to Four U.S. Cities

The road never sleeps: Aurora's trucks go driverless day and night

With the start of Aurora's day- and night-time driverless operations, customers are well-positioned to double utilization potential of self-driving trucks.

Waymo launches new robotaxi built on Chinese-made minivan

ATHENA BROWNING | 29 MAY 2026

Waymo has begun offering select members of the public rides in its newest robotaxi, a purpose-built electric minivan called the Ojai, as the company pushes to scale its fleet and reduce operating costs.

China: Scaling industrially

Pony.ai Plans 3,000 Robotaxis Across 20 Cities

Pony.ai plans to deploy over 3,000 robotaxis in 20-plus cities globally in 2026 after reporting 160% Q4 robotaxi revenue growth and achieving unit economics breakeven in two major Chinese cities.

SELF DRIVE NEWS STAFF / MARCH 27, 2026 / RIDE HAILING

Baidu's Apollo Go has expanded its robotaxi operations to around 20 cities in China

Lei Kang • Jan 15, 2026, 9:04 AM GMT+1 0 6

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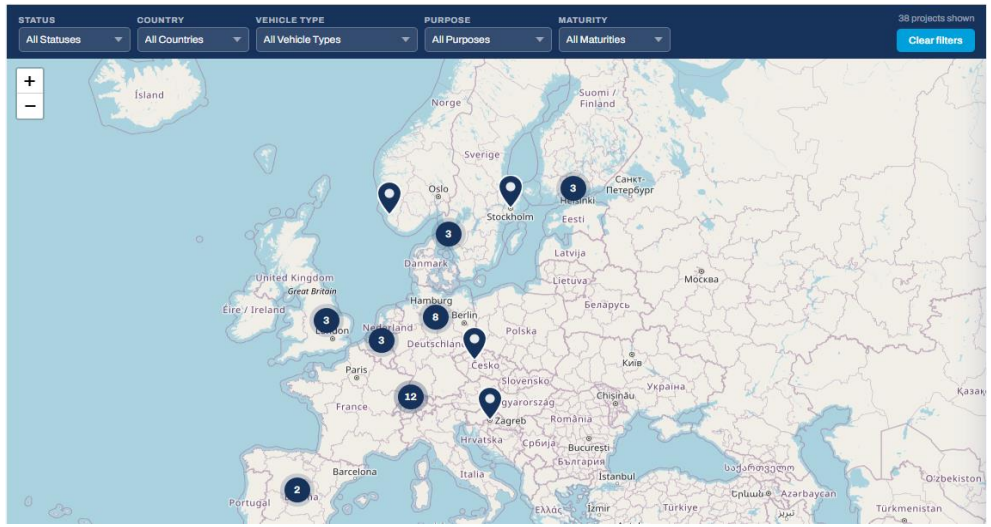
In the third quarter of 2025, Apollo Go delivered 3.1 million fully driverless autonomous ride-hailing trips.

WeRide Launches 24/7 Fully Driverless Robotaxi Service in Guangzhou's Huangpu District

What's Happening in Europe Now?

Europe: a Pilot Factory



	Fixed-Route Passenger	Free-Floating Passenger	Logistics & Delivery
Commercial	5	2	3
Pilot	11	11	2
Study	— No Study-stage Fixed-Route projects	2	2
TOTAL	16	15	7

Balanced Pilot split

Fixed-Route and Free-Floating are tied at 11 Pilot entries each — symmetrical deployment activity despite fundamentally different operating models.

Logistics ahead commercially

43% commercialisation (3/7) vs 31% Fixed-Route (5/16) and 13% Free-Floating (2/15). No passenger liability removes the primary regulatory bottleneck.

Free-Floating lags commercially

Only Ruter Groruddalen (NO) and Verne (HR) are commercial Free-Floating. Destination flexibility creates liability complexity that slows regulatory clearance.

Germany is a pilot factory

10+ German Pilot entries, zero Commercial. Strong public-funding culture accelerates trials but the commercial framework is absent.

10 / 85+

Maturation Gap

Out of over 85 pilot projects, only 10 have moved into a commercial service application

63%

Pilot Bottleneck

of entries remain in Pilot-stage across all 3 functions — the single biggest barrier to scale

↗

Commercialization Trend

Typology shows a strong movement for commersialisation in fixed-route Passenger Services

University of St.Gallen
Institute for Mobility

pwc

UK opens door to first public robotaxi services this year

ATHENA BROWNING | 22 MAY 2026

The UK government has opened applications for commercial self-driving passenger services, paving the way for robotaxis and autonomous shuttle-style vehicles to begin carrying members of the public on British roads later this year.

ZAG DAILY

Einride and DAF partner to accelerate scale-up of autonomous electric freight

Important step towards large-scale commercialization of SAE Level 4 trucks

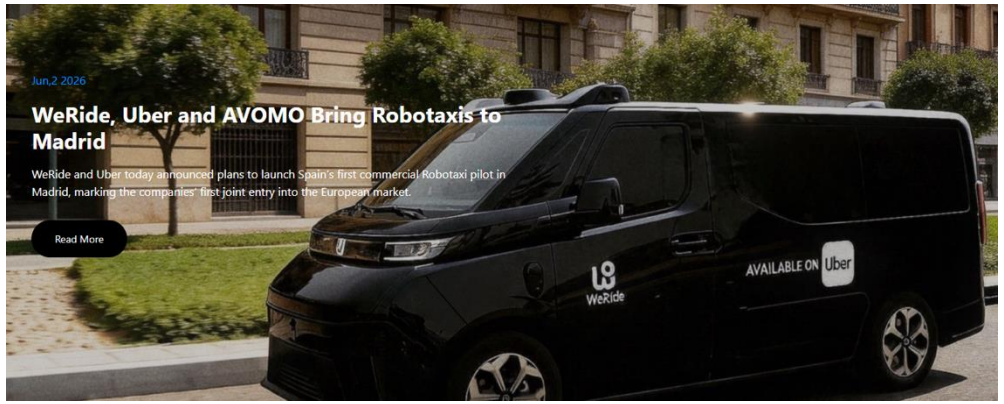
VERNE, PONY.AI, AND UBER PARTNER TO LAUNCH EUROPE'S FIRST COMMERCIAL ROBOTAXI SERVICE

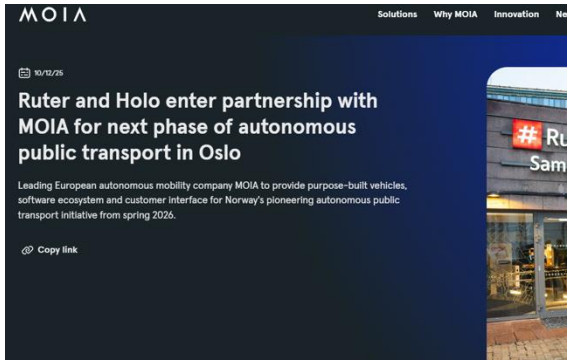
The partnership will begin in Zagreb, where deployment is already underway, before expanding to additional cities in Europe and beyond

3 MIN READ

December 9, 2025

Stellantis and Bolt Partner to Advance Large-Scale Deployment of Driverless Mobility in Europe





Zurich Airport reached a major milestone: its two automated shuttles are now operating without anyone onboard responsible for driving or supervising the vehicle.

Barriers to Deployment

Six Factors Standing Between Pilots and Scale

Technology

- EU L4 maturity
- Limited ODDs
- Safety validation

Standards

- HD maps
- Remote operation

Regulation

- Homologation, testing, type approval
- Harmonisation
- GDPR

Infrastructure

- Common data spaces
- Investment in physical and digital infrastructure

Awareness & Understanding

- Education
- Engagement
- Experience

Financial

- High initial costs and upscaling
- Business cases

Why Europe Is Falling Behind

“

KEY MESSAGE

Europe must align policy, investment and deployment around a common industrial ambition.

WHAT'S MISSING

01 **Europe Innovates, but Struggles to Scale**

02 **Deployment Has Become the Real Competitive Advantage**

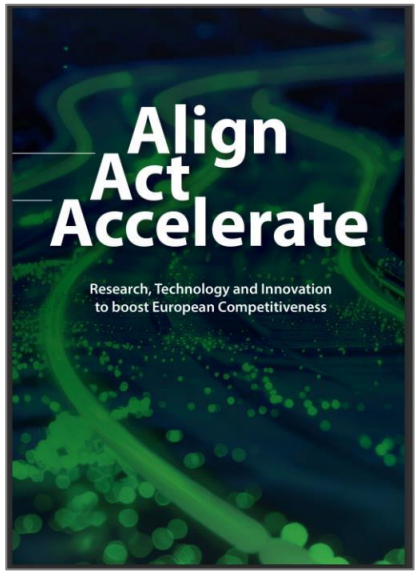
03 **Europe Lacks the AV Industrial Foundations for Leadership**

04 **Regulation Builds Trust, but Must Enable Growth**

05 **Success Depends on Operational Excellence**

06 **Europe Needs a Shared Vision and a European Mobility Model**

An evolving policy framework for competitiveness



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EU Automotive Action Plan

Reclaim European leadership in AI-powered mobility

Innovation | Competitiveness | Skills | Strategic autonomy

European Commission

Towards a Single Market for Autonomous Driving

ECAVA	Cross-Border Testbeds	CCAM Partnership	PAVE Europe	EFAT	PACT for Europe	JRC CCAM Observatory
(European Connected and Autonomous Vehicle Alliance) Industrial alliance to foster Software Defined Vehicles (SDV), AI and AD stack development, AV deployment, Automotive hardware	Harmonise testing procedures. Facilitate cross-border operations.	Europe's public-private partnership driving research, innovation, testing and large-scale demonstrations for Connected, Cooperative and Automated Mobility	A multi-stakeholder coalition promoting public understanding, stakeholder engagement and societal readiness for automated mobility.	EFAT (European Forum for Automated Transport) align regulatory approaches across Europe.	A coalition of public authorities accelerating the transition from AV pilots to large-scale deployment in public transport.	Monitoring the deployment of (CCAM) services in Europe and worldwide

EU Funding

CCAM Partnership Horizon Europe Large Scale Demonstrations + other CCAM Calls (deadline 8 Ocotber 2026)

CEF Transport call: support cross-border test bed initiative for digital infra and connectivity (deadline 6 Ocotber 2026)

ADACities: Call for expression of interest open until 30 September - Horizon Europe funding call planned for late 2026

(Possible) Future Automotive JU

IPCEI Important Projects of Common European Interest by Member States (Clean, Connected, Autonomous Vehicles)

How Can Europe Catch Up in the Global AV Race?

KEY MESSAGE

Europe has already established regulatory leadership. The next phase is deployment leadership, turning innovation and regulation into large-scale services and industrial competitiveness.

Europe does not need more pilots. It needs to scale what already works.

5 PRIORITIES FOR EUROPE

01 Scale Deployment, Not Just Pilots

02 Create a True European Test and Deployment Area

03 Strengthen the European Ecosystem

04 Invest in Strategic European Innovation

05 Build Public Trust and Market Readiness

What Can Governments (and Sweden) Do to Catch Up?

5 ACTIONS FOR GOVERNMENTS

1. **Establish a Single European Deployment Framework**
2. **Act as a Launch Customer**
3. **Enable Large-Scale City Deployments**
4. **Invest in Enabling Infrastructure**
5. **Build Public Trust and Acceptance**

BUILDING THE NATIONAL ECOSYSTEM

Scale-up succeeds only when all stakeholders actively deliver their part of the ecosystem.

PAVE EUROPE

Born out of a desire to drive human adoption of autonomous technology

PAVE Europe's **diverse membership** includes international corporations, start-ups, consumer advocates, nonprofit groups, and other stakeholders.

Why PAVE Europe matters:

Realising the Potential of Autonomous Vehicles

EDUCATION

ENGAGEMENT

EXPERIENCE

Publications

ALL AVAILABLE FOR DOWNLOAD:

OUR **PROJECTS**

AIGGREGATE

AUTOSUP

connected automated driving.eu

CCAMERAS

CHORUS

DIVERSIFY CCAM

GOLIA

SYNERGIES

RemoteReady Move

Pre-LSDemo

Interreg Co-funded by the European Union
North-West Europe
CAMINO-2

Projects funded by the European Union

Autonomous mobility is not just a technological evolution – it's a societal transformation.

The question isn't whether AVs will shape the future of Europe's mobility ecosystem, but how we can shape that future together.

PAVE EUROPE

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JOIN US
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