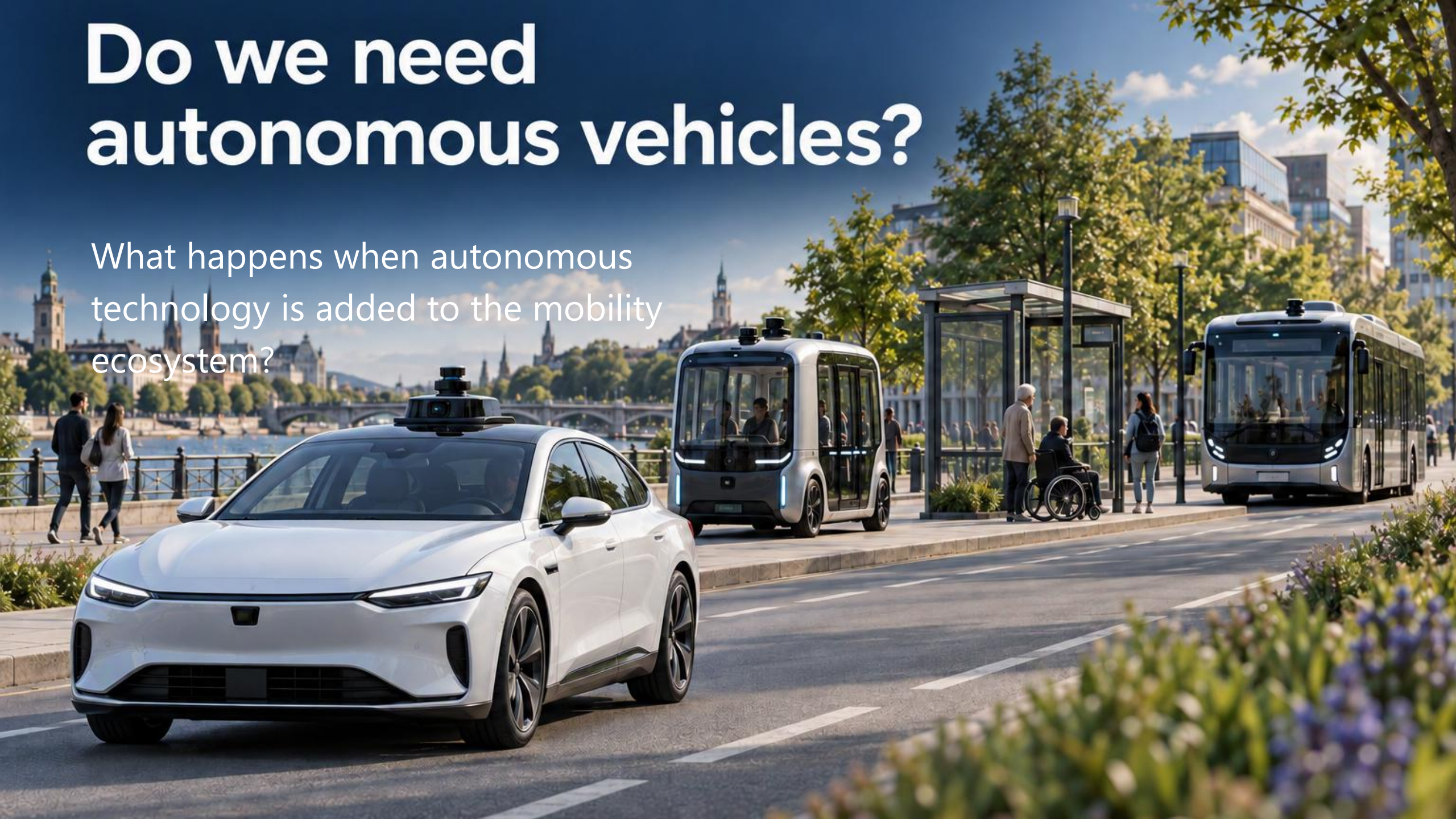
# Mobilizing Europe for the autonomous revolution

Guido Di Pasquale
Managing Director
PAVE Europe
Partners for Automated Vehicle Education

**24 November 2026**

# Do we need autonomous vehicles?

What happens when autonomous technology is added to the mobility ecosystem?




Congestion


Modal shift


Road safety
PubAffairsBrussels


Accessibility


SF


dpd
Reducing emissions
in our city
one delivery at a time
PR001
2031


autonomous bus


ID. BUZZ
BS VW 532E




apollo




kodiak
Self-driving truck



# The Global Race for Autonomous Mobility

## The race has moved from testing to scaling.

**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

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






**Zoox Expands Robotaxi Service to Four U.S. Cities**

Zoox is expanding its autonomous robotaxi service to four U.S. cities with new pickup locations, rider features, and plans for airport service in Las Vegas.

SELF DRIVE NEWS STAFF / MARCH 25, 2026 / RIDE HAILING










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.

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

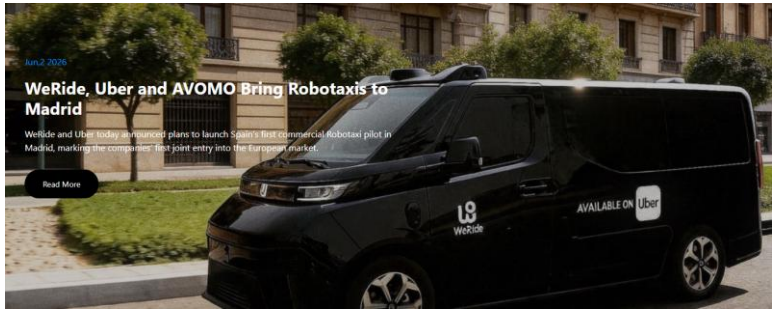
The partnership will begin in Zagreb, where deployment is already underway, before expanding to additional cities in Europe and beyond

3 MIN READ
















**Munich's biggest taxi firm plans up to 500 Tensor robotaxis in Germany**

MTZ would run the cars under its own brand, with Tensor supplying the driving software as a subscription. The plan still needs final agreements and Level 4 approval in Germany.

October 28, 2026 - 7:06 pm GMT



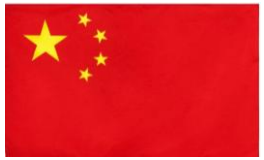
# Global Comparison



## 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

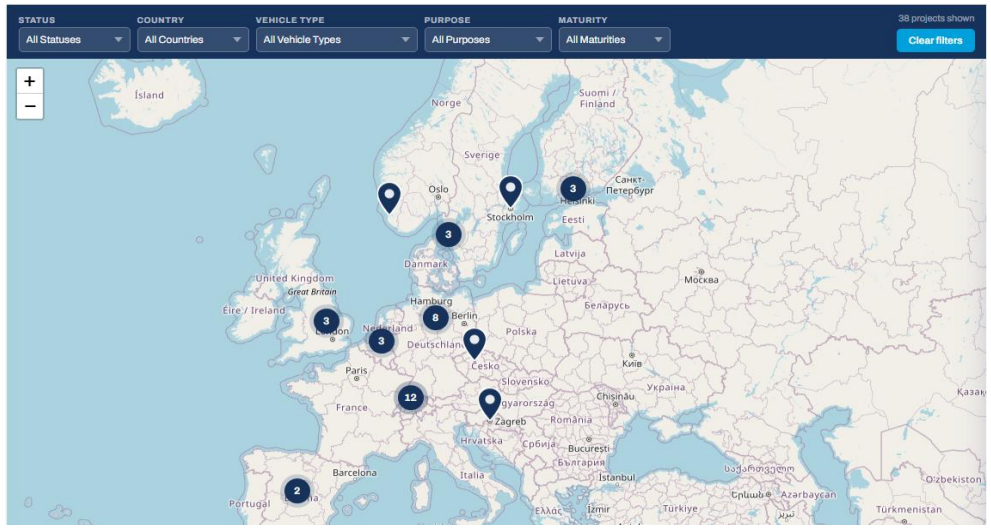


## European Union/UK/CH

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

**Position:** Safety & Regulation Leader

# 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

# Europe's Challenge: From Pilots to Deployment

**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.

## THE PRIORITIES

**01** Scale deployment as a competitive advantage, not just pilots

**02** Create a True European Test and Deployment Area

**03** Invest on Operational Excellence

**04** Connect cities, operators, OEMs, suppliers and AI developers

**05** Invest in Strategic European Innovation

**06** Build Public Trust and Market Readiness

# What Can Governments and Cities Do?

## 5 ACTIONS

**Not passive observer, but critical actors in the deployment of autonomous mobility**

1. **Support 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**

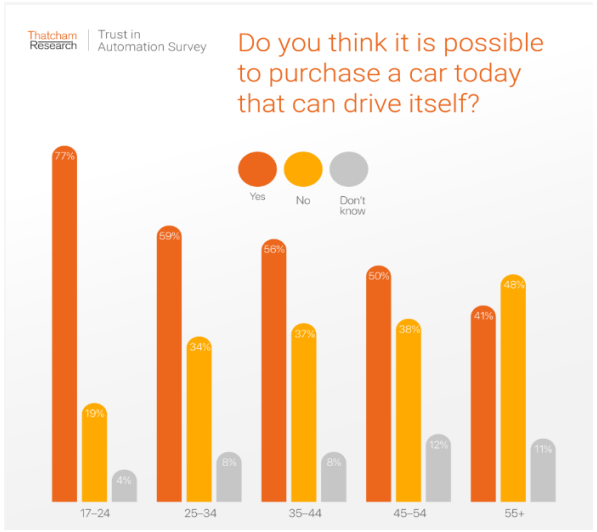
### BUILDING THE NATIONAL ECOSYSTEM

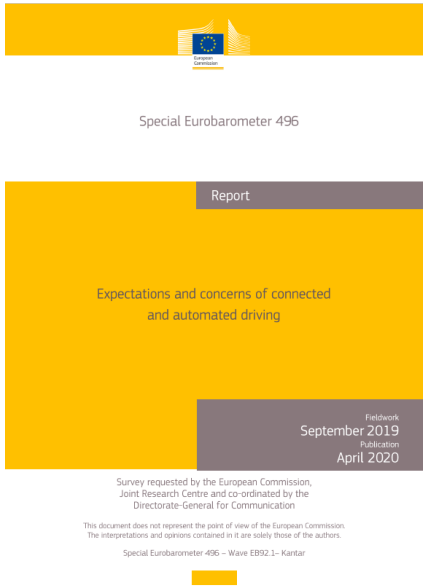
**Scale-up succeeds only when all stakeholders actively deliver their part of the ecosystem.**

PAVE EUROPE

# Humans are not ready for automated mobility




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

## Why PAVE Europe matters:

Realising the Potential of Autonomous Vehicles



EDUCATION



ENGAGEMENT



EXPERIENCE

PAVE EUROPE

**The future of autonomous mobility will not be defined by technology alone, but by how we deploy it together.**



PAVE EUROPE

PARTNERS FOR AUTOMATED VEHICLE EDUCATION

JOIN US
in our conversation with the public about the future of transportation.

www.pavecampaign.eu


**Guido Di Pasquale**
PAVE Europe
Managing Director

guido.dipasquale@pavecampaign.eu