

Waymo for London

Our vision for how Waymo's autonomous vehicles can support London's goals

Autumn 2026



WAYMO



Introduction

After more than ten years of consultation and policy development, the Department for Transport (DfT) announced a commercial piloting regime¹ for autonomous vehicle (AV) deployments in May 2026, which is then due to expand from the end of 2027. Waymo engaged closely with officials and contributed to consultations throughout that decade of work and strongly backs the government's approach.

With the foundation set, London and the United Kingdom have the opportunity to implement one of the world's most rigorous autonomous vehicle policy frameworks—one that combines stringent national safety oversight with critically important local consent.

Deployment in partnership with London

At Waymo, we recognise that the deployment of AVs must be done in partnership with the communities operators aim to serve. We measure our impact by helping build safer, more connected, and vibrant cities where everyone can move freely. Our offer to London is simple: to be a partner in helping the city achieve our shared safety and mobility goals, in accordance with the Mayor's Transport Strategy (MTS).

Waymo provides an additional mobility option that Londoners can add into their multimodal journeys as they move across the city. Waymo can connect Londoners to public transport, enable safer journeys across the road network, address underserved accessibility needs, and offer a secure option for women and others travelling late at night or early in the morning. While autonomous vehicles (AVs) cannot solve all challenges facing cities like London, the technology and the services they power provide real benefits, aligned with the city's existing goals.

We strongly endorse the MTS. Any Automated Passenger Service (APS) deployed in the capital must align with its ambitions and demonstrate true partnership to be successful. London has an iconic public transport network,

Waymo plans to operate an Automated Passenger Service (APS) in London. This will be the first time any operator has deployed a truly autonomous service on London's roads. If approved by DfT, we will enable the vehicles to drive autonomously without a driver behind the wheel, guided by strict safety practices. With the consent of Transport for London (TfL), Londoners will be the first in Europe to access the benefits of fully autonomous driving.

dense streets, complex junctions, significant clean transport and safety goals, and a streetscape that is abundant with pedestrians, cyclists, buses, and taxis. We know how important it is to deliver a service that works for all Londoners, and seamlessly integrates with this existing ecosystem.

Our commitment to the capital is built from five core contributions that directly support the Mayor's Transport Strategy (MTS):

- 1 Help London achieve Vision Zero and create safer streets
- 2 Open travel to more Londoners
- 3 Complement existing sustainable transport modes
- 4 Maximise efficient use of road and kerb space
- 5 Advance the tech economy and future skills for London

¹ Department for Transport (2026), Passengers one step closer to booking taxi and bus-style self-driving vehicles.

Available at: <https://www.gov.uk/government/news/passengers-one-step-closer-to-booking-taxi-and-bus-style-self-driving-vehicles> (Accessed: 14 August 2026).

A white Waymo self-driving car is shown in profile, facing right. It has a blue 'W' logo on its roof. The car is positioned in front of a night-time cityscape of London, featuring the Tower Bridge on the left and the Shard on the right. Overlaid on the image are several concentric, semi-transparent blue circles emanating from behind the car, suggesting its sensor range.

Waymo for London

EXECUTIVE SUMMARY

1

Achieve Vision Zero and create safer streets

Safer streets

Reduction in serious injuries or worse crashes

VRU safety

Safer streets for people who walk, bike, scoot and drive

2

Open travel to more Londoners

Independent travel

Supporting disabled people to travel without relying on a driver

Personal security

Reliable and secure transportation, especially for women and late shift workers

3

Complement existing sustainable transport modes

100% electric fleet

Decreasing emissions and accelerating climate goals

Transit rewards, mobility hubs & microtransit

Incentives to encourage public transit use alongside Waymo

4

Maximise efficient use of road and kerb space

Maximising efficient running

Making efficient and conscientious use of our vehicles

Living without a private car

Offering Londoners a dependable alternative to their car

5

Advance the tech economy & future skills for London

Workforce development

Investing in local workforces to power fleet operations

Street & safety analytics

Sharing street conditions and safety insight data to help cities optimise asset management and achieve safer streets

Help London Achieve Vision Zero and Create Safer Streets



London Today

Addressing road danger is a public health imperative, and key to promoting active travel and social equity in London.

Despite significant progress in reducing road danger, London's vulnerable road users (VRUs) – pedestrians, cyclists, and motorcyclists – remain disproportionately at risk. In 2024, VRUs accounted for 81 per cent of all Killed or Seriously Injured (KSI) incidents on London's roads.² In addition, the three most frequently cited contributing factors in collisions involving VRUs are drivers failing to look properly, failing to judge another road user's path or speed, and careless or reckless driving. Notably, excess speed remains a critical threat, contributing to half of all fatal collisions in the capital.³

The MTS has set out a clear ambition to eliminate all deaths and serious injuries from London's transport network by 2041.⁴ It also asks that any new transport service deployed must actively support these safety goals. This target is reinforced by the Vision Zero Action Plan 2,⁵ which includes strict interim targets: a 70 per cent reduction in the number of people killed or seriously injured (KSI) on the road network by 2030 (against a 2010–14 baseline), and a 65 per cent reduction by 2035 (against a 2022–24 baseline).

Vision Zero's Safe System approach recognises that humans make mistakes, and that human mistakes cannot be eliminated through safer streets or speeds alone. We must also introduce safe vehicles and safe road users into the system to make further progress towards Vision Zero.

² Transport for London (2025) Road Safety Data Dashboard. Available at: <https://tfl.gov.uk/corporate/publications-and-reports/road-safety> (Accessed: 30 July 2026).

³ Transport for London (2025) Road Safety Data Dashboard. Available at: <https://tfl.gov.uk/corporate/publications-and-reports/road-safety> (Accessed: 30 July 2026).

⁴ Transport for London (2018) The Mayor's Transport Strategy. Available at: <https://tfl.gov.uk/corporate/about-tfl/the-mayors-transport-strategy> (Accessed: 30 July 2026).

⁵ <https://tfl.gov.uk/info-for/media/press-releases/2026/march/mayor-unveils-new-joint-road-safety-plan-as-part-of-vision-zero>

Waymo's Safety Contribution

Waymo's technology fits squarely within Vision Zero's Safe System approach. Backed by industry-leading safety practices, the Waymo Driver—the hardware and software that drives the vehicle—is always alert, follows speed limits, promotes seat belt use, making it one of the safest drivers and vehicle technologies on the road.

Our service also actively supports the Mayor's goals of achieving Vision Zero in London. The data shows Waymo is already making streets safer in the cities where we operate.

To understand our performance, we conduct retrospective analyses using industry-leading, peer-reviewed methodologies that enable an “apples-to-apples” comparison by matching our data against local, time-specific human driving behavior.⁶

This real-world comparison shows that Waymo consistently avoids more injury-related crashes than human drivers, particularly during high-risk times such as overnight hours when human crash rates often spike, and provides additional protection to VRUs.⁷



Pedestrians

We are 14 times safer than human drivers, with a crash rate of 0.03 incidents per million miles (IPMM) compared to 0.37 IPMM for humans.



Cyclists

We are nearly 6 times safer than human drivers, with a crash rate of 0.04 IPMM compared to 0.26 IPMM for humans.



Motorcyclists

We are 6 times safer than human drivers, with a crash rate of 0.03 IPMM compared to 0.17 IPMM for humans.

⁶ Kusano, K. D., Scanlon, J. M., McMurtry, T. L., & Victor, T.. Do time of day and day of week matter when comparing Waymo's automated driving system and human crash involvement rates? Traffic Injury Prevention (in press).

⁷ waymo.com/safety/impact

We have achieved these crash reductions precisely because the Waymo Driver is designed to remove the most significant contributing factors to traffic crashes.

Even the best human drivers can suffer from distraction and fatigue, but the Waymo Driver is designed for consistent, safe performance supported by core capabilities including:



Constant 360-degree perception

Using a suite of lidar, cameras and radar, the vehicle constantly monitors its environment up to three football fields away, anticipating the movement of pedestrians and cyclists.



Speed compliance

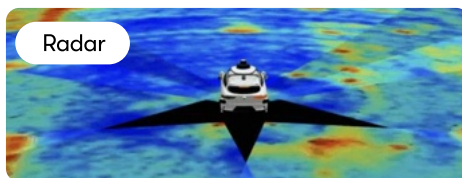
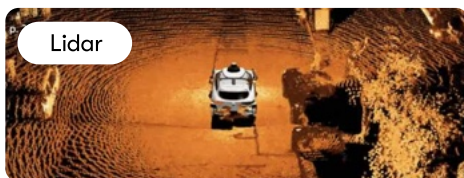
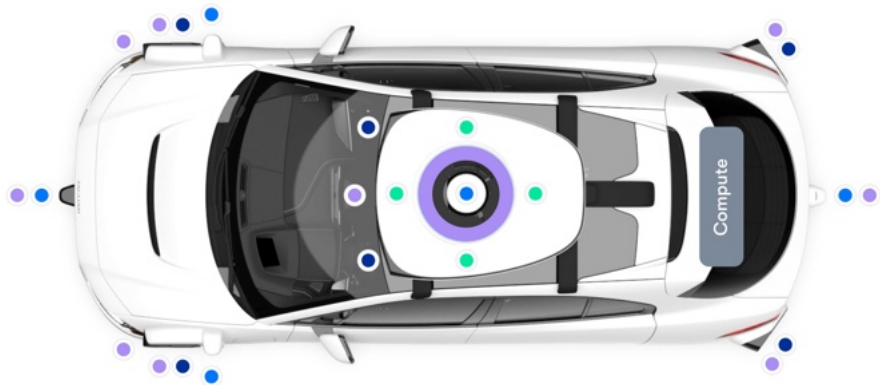
The vehicle is designed to obey speed limits and dynamically adjust its speed to road conditions, removing speeding as a risk factor.



Junction safety

Advanced planning algorithms allow the vehicle to safely navigate complex intersections, where a large proportion of collisions involving vulnerable road users occur.⁸ In the U.S., the Waymo Driver has been found to reduce vehicle-to-vehicle intersection crashes by 95% compared to human benchmarks.

-  Lidar system
-  Vision system
-  Radar system
-  Microphone system



The UK rightfully sets a high standard of safety under the Automated Vehicles Act 2024. Our design philosophy is backed by a formal safety governance structure,^{9 10} and the protection of VRUs stands prominently throughout this safety framework. This ensures that even as the system is determined to be ready for deployment, rigorous evaluations verify that it does not introduce any disproportionate risk to pedestrians, cyclists or motorcyclists who are historically most at risk on roads.

One critical way to proactively evaluate the Waymo Driver is by benchmarking it against a “Reference Driver” — a virtual model of a careful, competent human driver — to verify its ability to anticipate hazards and avoid collisions. Our latest virtual model, based on the peer-reviewed research developed in partnership with TU Delft, is built upon the same predictive processing framework that powers our established NIEON (Non-Impaired driver with Eyes ON the conflict) model, ensuring continuity in our approach.

⁸ Department for Transport (2026), Reported road casualties Great Britain: pedestrian factsheet, 2025. Available at: <https://www.gov.uk/government/statistics/reported-road-casualties-great-britain-vulnerable-road-user-factsheets/reported-road-casualties-great-britain-pedestrian-factsheet-2025> (Accessed: 24 August 2026).

⁹ Webb, N., Smith, D., Ludwich, C., Victor, T., Hommes, Q., Favaro, F., et al. (2020). Waymo’s safety methodologies and safety readiness determinations. arXiv preprint arXiv:2011.00054.

¹⁰ Favaro, F. M., Fraade-Blanc, L., Schnelle, S., Victor, T., Peña, M., Engström, J., et al. (2026). Building a credible case for safety: Approach proposal for Automated Driving Systems. Journal of Safety Research, 96, 181-196.

Highway Code Rule H2

(Pedestrian Priority)

Introduced in 2022, Rule H2 requires drivers to give way to pedestrians crossing or waiting to cross at junctions. However, compliance is extremely low; research by the RAC shows that only 23 per cent of drivers claim to always follow this rule (RAC, 2024). This lack of compliance creates danger and unpredictability for pedestrians. The Waymo Driver is programmed to detect pedestrians waiting at junctions and yield consistently, helping to create a safer, more predictable environment that supports active travel like walking.



While autonomous technology is not a single solution to road risk, it can serve as a vital tool in the city's road safety toolbox, and as an important part of Vision Zero policies around the globe. By helping to reduce common human driving errors, the deployment of such technology can support London's progress towards Vision Zero as well as making it safer for people to walk and cycle in the city.

Open Travel to More Londoners



London Today

TfL has been a global pioneer in making London's transport infrastructure, some of which dates back to the 19th century, accessible for everyone today. However, we know that many Londoners still face significant barriers to travel.^{11 12}

Opening travel to all is a crucial objective of the MTS, reflecting the principle that London's transport network must be inclusive and accessible for everyone.¹³ We have heard through our engagement with community groups in the UK and from many of the thousands of people who have signed up to use our service that there are still too many barriers to getting around London.

For older and disabled people, independent travel is often compromised by discrimination and/or a lack of predictability. A particularly stark example is the treatment of guide dog owners. While TfL received 15 official complaints regarding guide dog refusals by private hire vehicles in the 2023-24 financial year, research by the charity Guide Dogs suggests the actual number of incidents is far higher due to under-reporting.

Across the UK, around 60 per cent of guide dog owners report being refused travel by traditional ride-hailing services.¹⁴ Unreliable services, sudden route changes and inconsistent driver behaviour further undermine the confidence of disabled passengers. Similarly, 1.45 million people over the age of 65 report difficulty in getting to hospital.¹⁵

Safety fears also restrict how and when many people travel. Research by the engineering consultancy SYSTRA in 2026 revealed that 48 per cent of women feel unsafe travelling alone after dark in the UK, compared with 19 per cent of men, leading 63 per cent of women to avoid evening travel entirely.¹⁶ This is compounded by concerns about harassment on public transport, with DfT data showing that 28 per cent of public transport users have experienced unwanted sexual harassment. For younger women, the impact is even greater; a 2025 Girlguiding survey found that 86 per cent of girls and young women avoid going out after dark due to safety concerns.¹⁷ The Mayor's strategy and the UK government's commitment on ending violence against women and girls highlight the importance of women and girls being and feeling safe in public spaces, including the transport network.

¹¹ Arup and Urban Transport Group (2022) Equitable Future Mobility. Available at: <https://www.arup.com/insights/equitable-future-mobility/> (Accessed: 30 July 2026).

¹² Transport for London (2024) Equity in Motion: Our journey to creating a fair, accessible and inclusive transport network. Available at: <https://content.tfl.gov.uk/equity-in-motion-full.pdf> (Accessed: 30 July 2026).

¹³ Under Policy 23 of the Mayor's Transport Strategy, new transport services are also expected to actively support this goal by ensuring they are accessible and inclusive for all demographics and physical abilities.

¹⁴ BBC News (2026) BBC News Article. Available at: <https://www.bbc.co.uk/news/articles/cy4k7090eq4o> (Accessed: 30 July 2026).

¹⁵ Age UK (2017), Painful Journeys: Why getting to hospital appointments is a major issue for older people. Available at: https://www.ageuk.org.uk/siteassets/documents/reports-and-publications/reports-and-briefings/active-communities/rb_dec17_painful_journeys_indepth_report.pdf (Accessed: 19 August 2026).

¹⁶ Women in Transport (2026) Women don't feel safe on the bus – and the evidence tells us why. Available at: <https://www.womenintransport.com/blog/women-girls-safety-uk-bus-network-systra> (Accessed: 30 July 2026).

¹⁷ Girlguiding (2025) Two thirds of girls change their everyday behaviour to avoid sexual harassment. Available at: <https://www.girlguiding.org.uk/about-us/press-releases/girls-attitudes-survey/> (Accessed: 30 July 2026).

The Waymo Contribution

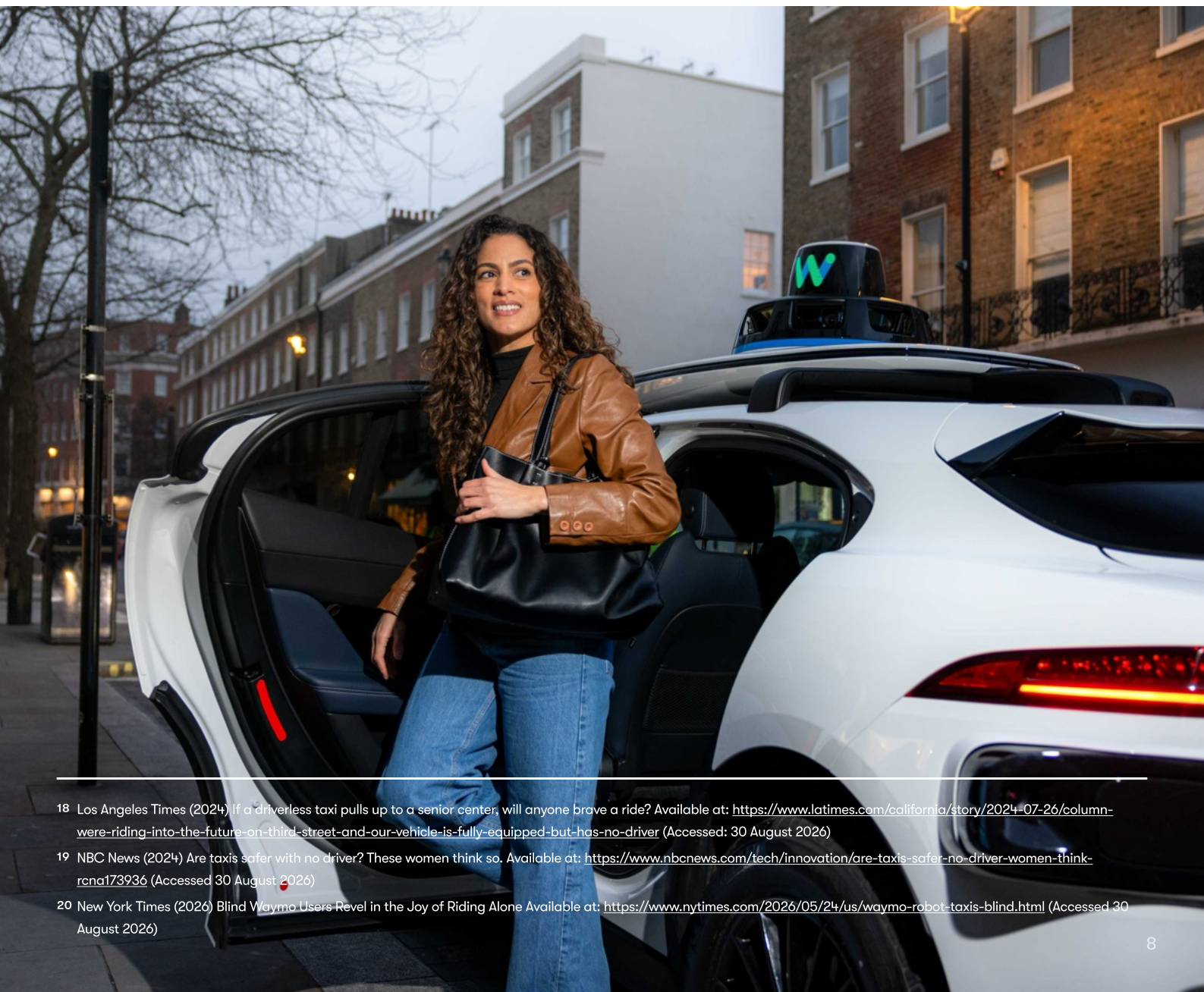
Waymo is designed to enable greater independence in how people travel. With TfL's consent, Londoners with different needs will be able to choose an on-demand transportation in which the rider is in full control of every aspect other than the driving.

Independence for Londoners with unmet needs

With nearly a decade of experience in operating a service and engaging the community, we know that improving accessibility in transport can never be addressed through a one-size-fits-all solution. Our service is designed with a clear focus on accessibility and safety throughout the entire journey, from booking and finding the vehicle to boarding and alighting.

Our experience in the U.S. shows just how impactful this can be; older people, women, and those with disabilities all report greater independence and an improved sense of freedom and security when travelling.^{18 19 20}

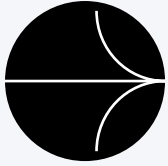
“[RNIB] recognises that autonomous vehicle technology has the potential to improve independent mobility for blind and partially sighted people, provided that safety, accessibility, audibility, and pedestrian detection concerns are fully addressed through co-design, testing, and appropriate standards.”



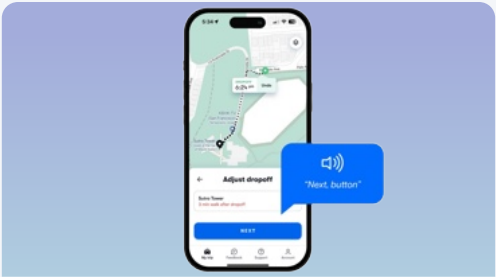
¹⁸ Los Angeles Times (2024) If a driverless taxi pulls up to a senior center, will anyone brave a ride? Available at: <https://www.latimes.com/california/story/2024-07-26/column-were-riding-into-the-future-on-third-street-and-our-vehicle-is-fully-equipped-but-has-no-driver> (Accessed: 30 August 2026)

¹⁹ NBC News (2024) Are taxis safer with no driver? These women think so. Available at: <https://www.nbcnews.com/tech/innovation/are-taxis-safer-no-driver-women-think-rcna173936> (Accessed 30 August 2026)

²⁰ New York Times (2026) Blind Waymo Users Revel in the Joy of Riding Alone Available at: <https://www.nytimes.com/2026/05/24/us/waymo-robot-taxis-blind.html> (Accessed 30 August 2026)



Co-designing our service with our user-experience team, feedback from riders with expertise-by-experience, and input from members of the Waymo Accessibility Network, we have developed a number of features to support this approach:



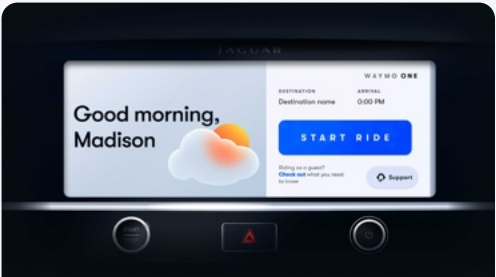
In-app accessibility and pick-up and drop-off optimisation

A dedicated menu allows riders to select features such as “Minimise Walking,” which requests pick-ups and drop-offs on the same side of the street to avoid crossings. The app also provides “Long Walk Warnings” to proactively inform riders if a walk more than three minutes long is required to reach a specific location.



Wayfinding and vehicle localisation

To help riders find their vehicle, the app offers “Adaptive App Navigation,” providing wayfinding with haptic cues, turn-by-turn walking directions, and a compass. Riders can also customise the colour and initials shown on the “Visual Car ID” (dome display) and trigger a distinctive chime or honk from the vehicle to locate it by sound.



In-car customisation

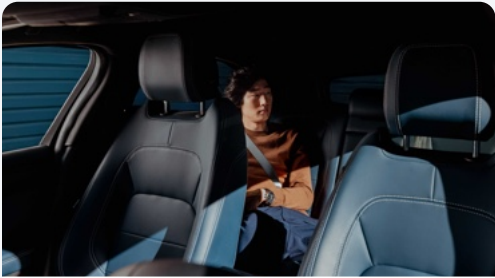
Riders have full autonomy over their in-car cabin environment, with the ability to control the air conditioning temperature and fan level, music choice and audio balance, and front passenger seat adjustments via the app to create more comfort or space, for a mobility device or guide dog.

Guide dog accommodation

Guide dogs are always welcome without prior notice. Riders can adjust the front seat to create more footwell space and are permitted extra time at boarding to ensure their guide dog is secured before the journey begins.

In-car experience and communication

The app is compatible with screen readers (Talkback/VoiceOver), and riders may choose to turn on “Descriptive Audio”, by which the vehicle announces manoeuvres and yielding. We offer “reduced in-car announcements” for anyone sensitive to sound, such as neurodivergent riders, and in-vehicle screens show text captions for audio updates. All in-car screen and app communications support 12 languages.



No verbal interaction required

By removing the human driver, the service eliminates the need for verbal communication, removing barriers for passengers who are deaf, hard of hearing, non-verbal, or have speech-related impairments, as well as reducing the psychological burden of travel negotiation.

24/7 Omnichannel Rider Support

Support is available via the in-car screen, phone, in-app chat, or email. Agents are trained to assist with wayfinding, including looking through the car’s cameras to help a rider understand their immediate environment or delaying a vehicle’s departure if a rider needs more time.



We recognise the service currently has limitations. Our current vehicles are not wheelchair accessible due to the lack of suitable electric vehicle platforms offered by automotive manufacturers. We will continue to advocate for more accessible platforms as we build out our global service.

We are also working with a partner to identify a pathway to ensure London riders who require wheelchair accessibility have an option to hail a human-driven wheelchair accessible vehicle that suits their needs through the Waymo platform.

Personal Security

Our service model provides a secure environment for all of our riders, including those who may feel more vulnerable when travelling alone or at night. The absence of a human driver eliminates the risk of driver harassment or inappropriate behaviour, while the system provides route tracking, in-vehicle controls, a direct link to Rider Support, standardised visual monitoring and automated access control. By removing the unpredictable human variable, we aim to deliver a high standard of personal safety.

“For many women, especially those who have experienced violence or harassment, the simple act of getting from Point A to Point B can be fraught with anxiety,” says Sarah Lords, Communications Director at the U.S. charity Fresh Start Women’s Foundation. “Autonomous cars help give women the freedom to move with confidence, providing a transportation option that reduces anxiety and elevates perceived safety when they need ride support. Additionally, with features like route tracking, women can now take control of their journeys and feel empowered every step of the way.”

We take rider safety, including interactions between riders, seriously. To ensure peace of mind, a Waymo is an environment where the rider retains autonomy over who enters their space, whilst having 24/7 support and access to emergency services available at the push of a button.





Riders can unlock their assigned vehicle upon arrival using the Waymo app or automatic proximity unlocking. During the trip, passenger safety is maintained through:



In-cabin cameras

Supporting rider safety, vehicle cleanliness and lost property recovery, backed by strict privacy safeguards.²¹



24/7 Rider Support

Accessible at the touch of a button via the in-car screen or the mobile app.



Seatbelt monitoring

Real-time sensors will alert Rider Support if any passengers unbuckle during the ride whilst the vehicle is in motion.



Pull ahead

The passenger has the option of moving the vehicle to a further drop off point if they feel unsafe on arrival at their planned destination.



Easy exit, secured entrance

The doors stay locked from the outside until and upon arrival until passengers wish to exit, but passengers always have the ability to exit the vehicle.

²¹ Information on Waymo's policies related to video, audio, and other in-car and external data recording and use can be found here: Setting the Global Standard for Privacy in Autonomous Mobility (August 2026) <https://waymo.com/blog/2026/08/waymo-privacy-approach/>

U.S. data shows that these features have a material impact on passenger confidence. In a Waymo user research survey in September 2025, between 54 per cent and 61 per cent of female riders (across multiple U.S. cities) reported that using Waymo improved their sense of personal safety when getting around. In London, Waymo has supported

and participated in an All-Party Parliamentary Group (APPG) with Women in Transport to discuss the desired impact of autonomous vehicles on women's journeys. These same features are also what enable us to respond quickly in the event of a passenger medical emergency.



“Our recent engagement with parliamentarians, policymakers and industry leaders at the All-Party Parliamentary Group event on women’s safety underscored the importance of designing transport systems that work for everyone, particularly women and girls,” said **Sonya Byers, CEO at Women in Transport**. “Partnerships like this one with Waymo present an important opportunity to explore how emerging autonomous technologies can be developed responsibly, with safety, trust and lived experience embedded from the outset. We are excited to work together to ensure innovation supports a more equitable and confident travel experience for all.”

Complement Existing Sustainable Transport Modes

London Today

The MTS sets an ambitious target for 80 per cent of all journeys in London be made by sustainable transport by 2041. The strategy highlights the need to improve connectivity in outer London and recognises that improving the start and end of journeys is critical to increasing public transport ridership.

Londoners benefit from a diverse, sustainable transport network. But public transport connectivity remains uneven, particularly across outer London boroughs where Public Transport Access Levels (PTAL) are lower. In these areas, first and last mile connectivity gaps present a significant barrier to sustainable travel. As a result, many residents rely on private cars for short trips that could otherwise be made by public transport if the initial or final connection was seamless and accessible.

Public transport has also been a key driving force behind London's significant progress in cleaning its air, as well as through the introduction, and expansion, of the Ultra Low Emission Zone (ULEZ) under the Mayor of London. But road transport remains a major source of air pollution in the capital, contributing to elevated levels of nitrogen dioxide (NO₂) and particulate matter (PM_{2.5}). The existing private hire industry, while transitioning, still relies heavily on fossil fuels. As of May 2025, only 29 per cent of private hire vehicles (PHVs) licensed in London were fully battery electric. The remainder, including plug-in hybrids, continue to emit tailpipe pollutants, particularly when operating in combustion mode within congested urban areas.



The Waymo Contribution

Waymo is focused on building a product and service that supports London's public transport infrastructure by bridging critical connectivity gaps. Key features of our proposed service integration design include:



Multimodal route planning

Integration into multimodal navigation apps to enable seamless routing that combines Waymo rides with rail, Underground, and bus networks.



24/7 complementary availability

The 24-hour service provides reliable connections during late-night hours when public transport options are limited and personal safety concerns are greater.



Integrated rewards

Waymo is developing automated reward schemes to automatically apply credits when riders use the service to connect to public transport



Mobility hubs

Working in partnership with public transport operators and local authorities to connect riders with public transport options.

Public Transport Connector²²



In October 2024, Waymo ran Transit Rewards Pilots in Los Angeles and San Francisco in the US — a first for Waymo, and the first of its kind in the world. The programme was set up as a rebate, where riders who were picked up and dropped off at one of the eligible stops received a \$3.00 promotion for a future Waymo trip.

Our primary motivations for this programme were to gather learnings about how our riders use Waymo alongside public transport and demonstrate our commitment to supporting the cities we operate in.

We saw a positive response to the San Francisco transit credit pilot:

- ~4,400 unique riders,
- ~25% riders received 2 or more credits, showing they participated in the pilot more than once,
- Weekdays off-peak were more common,
- Top riders took trips to/from the same stations,
- The majority of credits were earned at local train stations.

It is important to note that, as we relied on geofencing to assess if a rider used Waymo and transit together, these numbers are imperfect and did not necessarily accrue from the availability of the credit. Nonetheless, they provide a strong signal of the interest in combining public transport with Waymo.



Every Waymo vehicle in London will also be a battery electric vehicle (BEV), ensuring zero tailpipe emissions. Based on Waymo's U.S. sustainability metrics,²³ every 500,000 electric vehicle trips on the platform to date may prevent an estimated 530 tonnes of CO2 emissions compared to equivalent journeys in internal combustion engine vehicles.

It would not be possible to talk about transport in London without mentioning the iconic London Hackney Carriage. They provide a fundamental service to Londoners and many are already Zero Emission Capable.

They can drive in bus lanes, ply for hire, and all vehicles are wheelchair accessible. They will operate under a different regulatory regime to APS, protecting their emblematic status. Waymo is not designed to replace this unique service. We simply hope to offer Londoners a complementary choice; to support the differing needs of Londoners, across a wide geography, day and night.

Through close collaboration with TfL, Waymo aims to complement London's rich transport landscape with an additional sustainable travel option.

²² Waymo (2024), Clean rides, clear benefits: Waymo launches new public transit credit program. Available at: <https://waymo.com/blog/2024/10/clean-rides-clear-benefits-waymo-launches-new-public-transit-credit-program/> (Accessed: 20 August 2026).

²³ Waymo (2026), Sustainability at Waymo. Available at: <https://waymo.com/sustainability> (Accessed: 30 July 2026).

Maximise Efficient Use of Road and Kerb Space

London Today

The MTS also aims to reallocate road space, introduce active kerbside management and use the Congestion Charge and ULEZ to manage demand, and keep London moving.

London's road network is under intense pressure from high dependency on single occupancy vehicles, particularly in outer London, and the inefficient use of street space. We know that car use remains high and causes serious congestion, including when drivers circle for scarce parking.

The rise of private hire vehicles (PHVs), which currently number nearly 100,000,²⁴ add to the pressure, as these cars can run empty between bookings and double as personal transport when off-duty.

We believe the incentives of an AV operator are more aligned with cities focused on reducing congestion than traditional private hire companies. We support London's commitment to improving the efficiency of its road network and kerbside, and believe Waymo can be a strategic partner to the city as it develops sophisticated kerb management plans.



²⁴ Transport for London (2026), Taxi and Private Hire Licensing Information. Available at: <https://tfl.gov.uk/info-for/taxis-and-private-hire/licensing/licensing-information> (Accessed: 14 August 2026).



The Waymo Contribution

Maximising efficient running

For AV services, the vehicles are an important asset; Waymo internalises the costs of operating vehicles. In comparison, traditional rideshare companies normally push the costs of vehicle operation—risk exposure, depreciation, fuel, maintenance, and insurance—to individual private vehicle owners. Waymo is financially incentivised to reduce empty miles and increase vehicle utilisation to preserve vehicle longevity and maximise the value we produce from our fleet. Our vehicles will also be available for rides 24/7 unless undergoing maintenance or charging; they do not finish an eight-hour shift and drive home to be parked on a driveway or the roadside.

In all mature markets, we optimise our vehicles to be carrying passengers for the majority of the total miles driven. Vehicles drive to reach a passenger but they will only undertake that journey once a booking has been accepted; they do not ‘search out’ rides. Instead, we use sophisticated algorithms to pre-position vehicles based on expected demand. For example, rather than vehicles driving to an area of predictable high demand at the point of that high demand, we have already moved the vehicles into place to avoid travelling at peak times. This both limits the amount of driving to pick up a rider and minimises empty cruising in search of a potential customer.

Our vehicles also know exactly where they are going if they are seeking out parking in lieu of a booking. We acquire infrastructure around any city in which we operate in order to provide dedicated parking for the fleet which can also serve as charging stations for vehicles. We use private infrastructure as much as possible to minimise the use of the roadside to park, while also appropriately staging kerbside—a strategy which is shown to reduce empty vehicle miles by as much as 60 per cent.²⁵

It is this highly efficient fleet that enables us to operate over half a million trips per week across 11 U.S. cities (as of 30 July 2026) with vehicle numbers at a fraction of London’s taxis. And we note that a recent report²⁶ estimated that autonomous ridehailing services would contribute only a total of 1 to 2 per cent of annual vehicle miles travelled across the UK by 2035. This suggests that the number of autonomous vehicles on London’s roads will remain small in the coming years; a complete contrast to the initial introduction of ridehailing apps in 2012, and is why multiple experts believe that autonomous vehicles will not have a significant impact on congestion in London.²⁷

²⁵ Bahk, Hyland, Shaheen, Wolfe, and Cohen: Staging at the Curb: Evaluating the impacts of shared automated vehicle fleet operations under curb usage restrictions (August 2026) <https://www.sciencedirect.com/science/article/pii/S096585642600203X>

²⁶ Chamber of Progress (2026) Economic and Social Impacts of Automated Ridehailing Services in the UK. Available at: <https://progresschamber.org/research/automated-ridehailing-services-uk-impacts/> (Accessed: 30 July 2026).

²⁷ Financial Times (2026) Will Robotaxis Clog Up Britain’s Cities? Available at: <https://www.ft.com/content/1d47308d-5dcb-4238-b142-156bdb3d4f7a?syn-25a6b1a6=1> (Accessed: 31 Aug 2026)

Living without a private car

Autonomous Vehicles represent another alternative to owning a car. Waymo vehicles can be scheduled more consistently than traditional ride-hailing options, and will not decline a ride based on origin or destination. This gives riders the reliability and confidence they need to book trips in advance 24 hours a day, that they may otherwise default to their private car to do. This is the same level of reliability sought by those who choose to own their own car, not to mention the personalised experience of riding in a Waymo such as [linking your Spotify account](#), controlling the aircon, or customising preferred seating positions, all of which are available capabilities in the Waymo app.

We know from research conducted with users of car clubs that guaranteed access to modern, well-maintained vehicles and the removal of the personal burden of maintenance incentivise reduced dependence on private cars. With the decline of car clubs in London,²⁸ Waymo can offer Londoners a new way to rely less on a private car that supports the capital's transport goals. We also know that since the departure of Zipcar from London, 64 per cent of previous users have now either bought or leased a private car or were considering it.²⁹



We are seeing encouraging, early evidence that a reliable Waymo service is prompting people to avoid purchasing a second car or sell their current, second car. In a recent Waymo rider survey, 34 per cent of San Francisco residents reported needing to rely less on their private car because of their access to the Waymo service. However, the dependability of the service is directly tied to the size of the vehicle fleet and therefore it will take time to fully realise this benefit.

Our vehicle fleet in the Bay Area is still far smaller than the total number of Private Hire Vehicles in London today. In order to offer Londoners an alternative to their private car, it is important that we can deploy the fleet size necessary to support a dependable alternative.

While initial APS deployments will be limited in scale, Waymo is committed to maximising fleet efficiency from the outset. We are confident our service can help London transform its road network and kerbside, and enable modal shift.



²⁸ The Guardian (2026) London has lost 'catastrophic' 89% of car club vehicles since Zipcar exit. Available at: <https://www.theguardian.com/money/2026/jul/03/london-car-club-vehicles-zipcar-exit> (Accessed: 30 July 2026).

²⁹ CoMoUK (2026), Closure of Zipcar is growing appetite for car ownership in London: Insights from a survey with former car club users. Available at: https://cdn.prod.website-files.com/6102564995f71c83fba14d54/6a67035535c4e31140f97c76_CoMoUK%20Closure%20of%20Zipcar%20is%20growing%20appetite%20for%20car%20ownership%20in%20London_v02.pdf (Accessed: 20 August 2026).

Advance the tech economy & future skills for London



London Today

London is currently in the middle of a profound technological transition. With artificial intelligence (AI) reshaping industries and the broader job market, the city is actively working to manage this shift and position itself at the forefront of global innovation. Today, London stands as a growing AI capital. The Mayor of London has welcomed investment in AI, highlighting the increasing number of AI and technology companies that are choosing to establish their headquarters in the city. This influx of innovation brings significant potential for more economic and social value.

The core of London's strategy is a desire to make the technological revolution work for people and for London as a whole; the city's focus is on proactive preparation rather than reactive adaptation. This proactive stance was recently exemplified by the AI and Jobs Taskforce. The taskforce's recent report³⁰ highlighted that London must actively shape the AI change rather than wait for disruption.

³⁰ London AI and Jobs Taskforce (2026), Shaping how AI changes work in London. Greater London Authority. Available at: <https://www.london.gov.uk/programmes-strategies/business-and-economy/mayors-priorities-londons-economy-and-business/london-ai-and-jobs-taskforce/shaping-how-ai-changes-work-london> (Accessed: 20 August 2026).

The Waymo Contribution

Addressing today's transport challenges will inevitably bring about changes in the workforce. There must be a smooth transition to this new era of mobility. Our workforce development strategy focuses on recruitment, career preparedness and skills building, upward mobility, and advancing a policy agenda to support and increase the AV workforce talent pipeline, including ensuring London is as focused on technical and vocational skills as it is academic qualifications.

Workforce development

The arrival of APS presents new employment opportunities. Although APS require no driver, they must still be managed as part of a fleet requiring a variety of different roles including maintenance and operations. We recognise the concerns relating to job losses. However, we urge policymakers to consider three key points on the future AV workforce:



Wherever we deploy, we must create a local, skilled workforce to manage our fleet. In the U.S., our service centres in key metropolitan areas are staffed by a significant workforce that offers stable, high-quality opportunities. As we scale, we are creating an entire AV industry ecosystem with new businesses that hire workers to support fleets of vehicles including:

At Waymo, we also believe that the deployment of autonomous vehicles offers benefits to cities beyond just automating the driving task. With the fully driverless operation of our vehicles on London's roads, we believe we will be in a strong position to help city planners through our Urban Insights initiative.

- The fleet size: Deployments of APS will number far fewer than the existing taxi and PHV fleets;
- The operations investments: New local and highly skilled jobs requiring training and upskilling for AV fleets; APS approval would scale the number of vehicles in order to support commercial operations, and in turn directly scale the number of people working to support these fleets.
- The predictable trajectory: Independent economic modelling indicates that the adoption of automated passenger services will follow a measured, multi-decade trajectory rather than an abrupt market shift. Projections by Steer and Fourth Economy (2026) estimate that automated ride-hailing will support 18,000 operational roles across the UK by 2035. This steady adoption curve provides policymakers and industry with the necessary runway to invest in training programmes and manage a smooth workforce transition.³¹

- Mechanics and vehicle technicians who maintain our fleets;
- Dispatchers and facilities managers who help run the fleets;
- Building trades that create the infrastructure, including charging for fleets of autonomous, electric vehicles; and,
- Roadside assistance personnel to provide on-the-ground support to vehicles;
- Customer service representatives who help navigate in-person needs like lost and found;
- Remote operations personnel who provide advice to the vehicles and interact with emergency services

³¹ Steer and Fourth Economy (2026), Impacts of Automated Passenger Services in the UK. Available at: <https://www.steergroup.com> (Accessed: 24 August 2026).

We plan to invest in these same roles in the UK, in addition to recruiting that Waymo and our partners initiated last year for testing operations. We are also investing in the infrastructure needed to establish London as our first European service area:

- We have already opened two sites that will act as anchor investments for our presence in London
- We plan to locate remote operations investments in the UK
- We plan to increase investment in local jobs and infrastructure as our service grows in London

We also recognise the role we play in inspiring the next generation of skilled workers for autonomous fleets across the industry. That's why, in the U.S., we have worked with a number of organisations to bring specialised AV maintenance curriculum to community colleges,³² hands-on vocational training for young people,³³ and scholarships for technical students³⁴ in fields like EV technology, robotics, and advanced mechatronics. We intend to grow similar initiatives in the UK, which would support the Mayor's London Future Ready Guarantee Initiative to build new career pathways for young people in London.

CASE STUDY

Workforce development in the US



Launched in 2023, the LA-Tech x Waymo Career Readiness Institute prepares underrepresented LA youth for tech roles. The programme combines professional skills bootcamps, mentorship, and a two-week, Waymo-led "Autonomous Vehicle Experience" to demystify the AV industry. Highlighting its success in building a diverse talent pipeline, the programme's inaugural cohort featured 96 per cent BIPOC participants and 75 per cent first-generation college students.

Additionally, to further prepare and support students to take advantage of the growth of careers in the AV industry, we've partnered with TechForce Foundation to provide more than two dozen scholarships to support students pursuing careers in automotive technology, electrical and industrial tech, EV technology, robotics or mechatronics. The donation funds nearly thirty scholarships to help students cover the cost of their technical education and continue to build the next generation of technicians.

³² Bronx Community College (2025) BCC and Waymo Drive Forward the Future of Automotive Education. Available at: <https://www.bcc.cuny.edu/bcc-and-waymo-drive-forward-the-future-of-automotive-education/> (Accessed: 30 July 2026).

³³ LA-Tech.org (2023) Waymo partners with LA-Tech.org to launch LA Tech x Waymo Career-Readiness Institute for underserved youth. Available at: <https://la-tech.org/news-backend/waymo-partners-with-la-techorg-to-launch-la-tech-x-waymo-career-readiness-institute-for-underserved-youth> (Accessed: 30 July 2026).

³⁴ Waymo (2026) Partnering with TechForce to support the workforce behind fully autonomous ride-hailing. Available at: <https://waymo.com/blog/2026/02/partnering-with-techforce/> (Accessed: 30 July 2026).

The data innovation advantage

Autonomous vehicles must navigate urban streets with exceptional precision. Beyond safely moving passengers, an active commercial fleet also observes the physical roadway. Through its Urban Insights initiative, Waymo is exploring providing specific insights to help cities identify road safety hazards and manage public assets more effectively.



For example, this could include:

- Aggregated traffic data to help Transport for London and borough councils validate protected active travel routes
- Identifying degraded roads and potholes

By distributing these feeds through established channels like Waze for Cities, Waymo ensures data is immediately usable by city maintenance and planning teams without requiring bespoke software integrations. TfL is already a long-standing member of Waze for Cities.

As our service becomes another element of the mobility network, we look forward to exploring how our technology can enrich transport authorities' understanding of their cities in new and innovative ways.

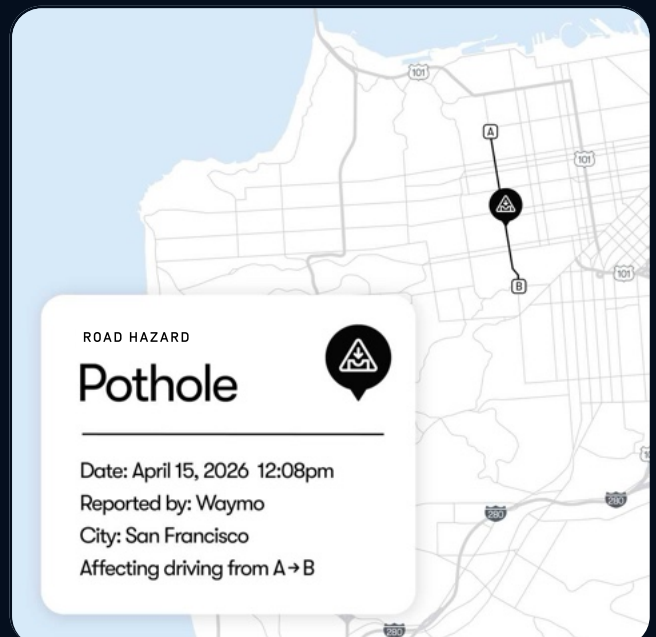
CASE STUDY

Pothole detection

In the US, Waymo is providing free pothole location data to local and regional authorities to improve street safety and road conditions via the Waze platform. We must have been operating without a driver behind the wheel for 6 months before we can begin to share this data.

Waymo detects potholes by 'feeling' how the car tilts and vibrates. We have converted this internal data into a "feed" to share with city and regional authorities via the Waze platform, including in the San Francisco Bay Area, Los Angeles, Phoenix, Austin, and Atlanta, with other regions to capitalise on this in the near future.

We intend to share the same data with the relevant authorities in London once we have been operating for the requisite period of time without a driver behind the wheel.



Conclusion

A Shared Vision for London

Autonomous vehicles represent more than a technological milestone; they offer a practical opportunity to build a safer, cleaner and more accessible London. By eliminating the human driving errors that exacerbate road danger, expanding independent travel for disabled and older Londoners, and bridging first- and last-mile connections to public transport, automated passenger services can help address some of the capital's most enduring transport challenges. AVs are not a universal remedy for urban mobility, but they provide a vital new tool in the city's transport toolbox.

To realise this promise, autonomous technology must be introduced in close collaboration with the city it serves. Waymo does not seek to disrupt London's iconic transport network, but to complement and strengthen it.

Delivering a service that works for all Londoners requires genuine partnership — working in lockstep with the Mayor, TfL, borough councils, emergency services and local communities to support the MTS from day one.

As London prepares for the first commercial deployments under the UK's new regulatory framework, Waymo is committed to being a dependable, long-term civic partner and a force for good on the capital's roads. By investing in local infrastructure, creating skilled technical careers for the future, and sharing safety insights to improve public streets, we look forward to helping London remain a global leader in safe, sustainable and inclusive urban mobility.

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