ESCAP
Economic and Social Commission for Asia and the Pacific

From Pilots to Scale:
Conditions Needed for Successful Deployment

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US AV Industry Trends Across Six Dimensions

- Geography
- Use Cases
- Business Models
- Regulations
- Challenges
- Benefits

From Pilots to Scale: US AV Industry Trends

how it started:

how it's going:

how it started:



how it's going:

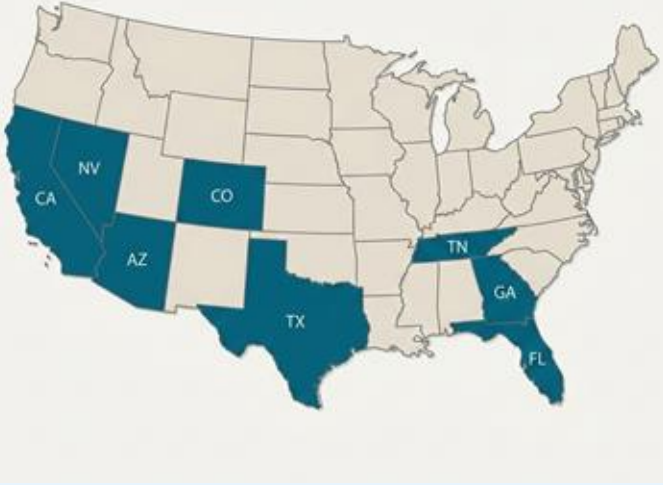


Geography – US

how it started:



how it's going:



Use Cases – US

how it started:



how it's going:



Business Models – US

how it started:

- Purpose-built
- Autonomous driving system with retrofit
- Fleet operator

how it's going:

All those plus:

- More ADS retrofit
- Personally owned
- Fleet-as-a-service
- Platform
- Attempts at use-agnostic
- Multi-party partnerships

Regulations – US

how it started:

- Nevada 2011
- Florida, California, Washington, DC in 2012
- Michigan in 2013
- Failed attempts at federal laws in 2016, 2017

how it's going:

- Over 40 states with laws, orders, or regs
- Maturing states (TX, CA)
- New federal bill re AV commercial vehicles
- USDOT / NHTSA revising rules; open docket

Challenges – US

how it started:

1. Demonstrate safety

how it's going:

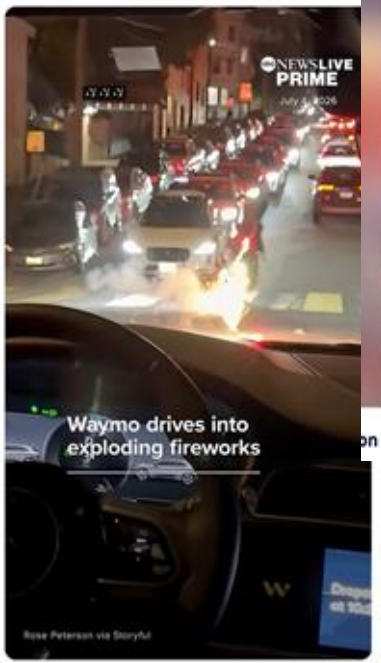
Um….

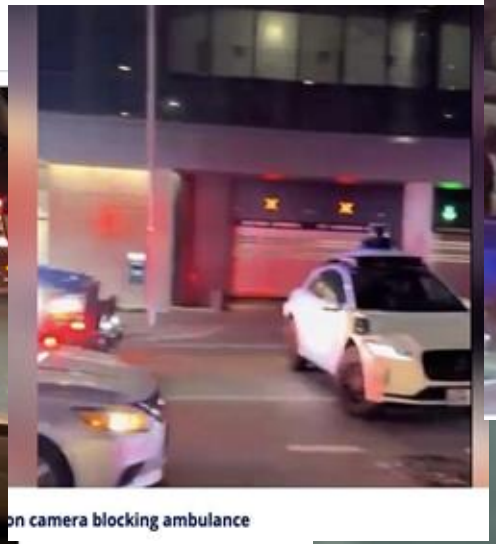


Challenges – US

how it's going:











Benefits – US

how it started:

1. **Safety**

how it's going:

- More options?
- Gap filling?
- Transit?
- Economic opportunity?
- Goods and services?
- Accessibility?
- Rural uses?
- Cleaner?

Best Practices

AV Industry

- Look locally – and beyond transportation regulators
- Invest in regulator readiness
- View all challenges through safety lens
- Prepare to adapt as you scale
- Help regulators prioritize

Regulators

- Build internal capacity
- Recognize challenges of scale
- Learn from peers and pilots
- Keep up with industry
- Avoid reactivity
- Prioritize

Both: Prepare for disruption and pivots



Thank you