DVN - Visit Report Pony.ai in Shanghai (June 2025)

DVN Team (Eric Amiot & Luc Bourgeois) with the Gen6 Robotaxi of Pony.ai

DVN Team with Kai Liu – Product Strategy Director

DVN had the great opportunity to meet with Pony.ai in Beijing, get a live interview and user experience in one of the robotaxis. We have also noticed many robotaxis from Baidu operating in the same district, a bit like in San Francisco with Waymo.

DVN driving experience: the driving was very smooth and safe, and the HMI was simple and user friendly. Pony has a mature technology and is introducing now its Gen7 with multiple cameras/lidars/radars. The target is to expand its fleet to 1000 robotaxis by end 2025. We see Pony.ai as one of the key-players operating robotaxis in China, with additional business opportunities in the middle east, EU, US. Thanks to Kai for this very interesting visit.

DVN-1 (History): Pony.ai was founded in 2016 by James Peng and Tiancheng Lou, who were software developers for Baidu, in Silicon Valley. Could you tell us more about the history and where you stand now?

Key-milestones:

Founded in 2016 in Silicon Valley, Pony.ai is developing Robotaxi, Robo-truck and Personally Owned Vehicle (POV) solutions in different countries around the world.

In January 2018, Pony.ai completed a $112 million Series A round.

In April 2019, Pony.ai launched a first pilot system covering 50 km^2 (19 sq mi) in Guangzhou for employees and invited affiliates, serving pre-defined pick-up points.

In November 2019, tests in the US started with a three-month trial in Irvine California, with 10 cars and defined stops for pick-up and drop-off.

In February 2020, Toyota invested $400 million in the company as part of a funding round of $462 million. Toyota previously announced that it was working with Pony.ai to test self-driving cars on public roads in Beijing and Shanghai. In 2020, the company had a valuation of $5.3 billion

In December 2021, California DMV suspended a driverless testing permit for Pony.ai following an accident. By June 2023, Pony.ai was back to testing its fleet with safety drivers present in California. But currently, the US market don't seem to have priority.

In April 2022, Pony.ai became the first autonomous driving company to get a taxi license in China

In April 2023, Pony.ai achieved the first million km (over 621,000 miles) of driver out testing.

In November 2024, Pony.ai held its initial public offering (IPO) and became a listed company on the Nasdaq raising $260 million.: Pony.ai co-founder and CEO, Dr. James Peng said: "Founded in 2016, Pony.ai has expanded its presence across China, Europe, East Asia, the Middle East, and other regions, ensuring widespread accessibility to its advanced technology. Pony.ai is among the first in China to obtain licenses to operate fully driverless vehicles in all four Tier-1 cities in China (Beijing, Guangzhou, Shanghai, Shenzhen) and has begun to offer public-facing, fare-charging robotaxi services without safety drivers in Beijing, Shanghai, Guangzhou and Shenzhen. Pony.ai operates a fleet consisting of over 300

robotaxis. To date, Pony.ai has driven more than 50 million autonomous testing and operation km on open roads worldwide."

In 2024, Pony.ai had 1300 employees.

In June 2025, Pony.ai started the deployment of its Gen7 Robotaxis in two Chinese cities.

DVN-2 (Strategy):How do you plan the deployment of your robotaxis. Which Countries have priority? Which partners are required, i.e. what are the benefits of your partnerships with Toyota or Uber?

- Deployment Strategy

Pony.ai has started the deployment process in China, South Korea, Middle east, EU (Luxembourg).
China is the priority with a deployment in Tier-1 cities first. Pony.ai has currently 300k+ registered customers on the Ponypilot mobile app, and has achieved a cumulated number of kilometers in pure driverless mode of 9 Millions of kilometers .

Middle east and Singapore can support a business case
In EU, the deployment will take time: the interest of some big cities are there but regulation and car models still have some limitation.
In the US: tests are still going on in California, but a deployment is not a priority for now.

- Partnerships for Robo Taxis

In August 2023, Toyota and Pony.ai developed plans to mass produce robotaxis in China. The two companies and GAC-Toyota, a venture between the Japanese automaker and Chinese state-owned Guangzhou Automobile Group, will invest more than 1 billion yuan ($140 million) combined.

In July 2024 – ComfortDelGro Corporation Limited, a leading multimodal transport operator in Singapore, and Pony.ai, signed a Memorandum of Understanding (MoU) to form a strategic partnership for largescale commercial robotaxi operations.

In March 2024, pony.ai signed a Memorandum of Understanding (MoU) with Emile Weber, Luxembourg's and the Greater Region's leading transport company, to advance the development of autonomous mobility in the Grand Duchy.

In November 2024 - Pony.ai and the new energy vehicle arm of BAIC Group, BAIC BJEV, formed their partnership on developing L4 autonomous vehicles. The companies aim to release the initial fleet of ARCFOX αT5 Robotaxis by 2025. Pony.ai and BAIC BJEV will also seek regulatory approval and production certification for L4 autonomous vehicle models.

In April 2025, Pony.ai partnered with Tencent Cloud and Smart Industries Group, the cloud business division of Tencent Holding, to advance autonomous driving technology - by

leveraging Tencent's ecosystem — including Weixin, Tencent Maps and its robust cloud computing, big data and AI infrastructure.

The same month, Pony.ai received a permit from Luxembourg's Ministry of Mobility and Public Works to begin Level 4 (L4) Robotaxi testing.

In June 2025 - Pony.ai announced they are partnering with Shenzhen Xihu, the largest taxi group in Shenzhen to deploy a fleet of more than 1000 robotaxis over the next few years.

That same month, Pony.ai also announced a strategic partnership with Uber to bring robotaxis to an undisclosed country in the Middle East. The move strengthens Uber's position in autonomous mobility, following deals with May Mobility, Momenta, and Waymo, amid rising global competition in the robotaxi market.

Pony.ai, has partnered with Dubai's Roads and Transport Authority (RTA) to formally launch a strategic collaboration aimed at deploying L4 autonomous robotaxi services, starting with supervised trials in 2025

July 2025: Co-founder says firm partners with carmakers GAC, BAIC and Toyota on gen-7 robotaxi production, targeting a fleet of 1,000 robotaxis by end 2025.

Pony.ai leverages its vehicle-agnostic Virtual Driver technology to integrate software, hardware, and services, working toward sustainable mass production and deployment of autonomous mobility solutions globally.

- Partnerships for Robo-Trucks

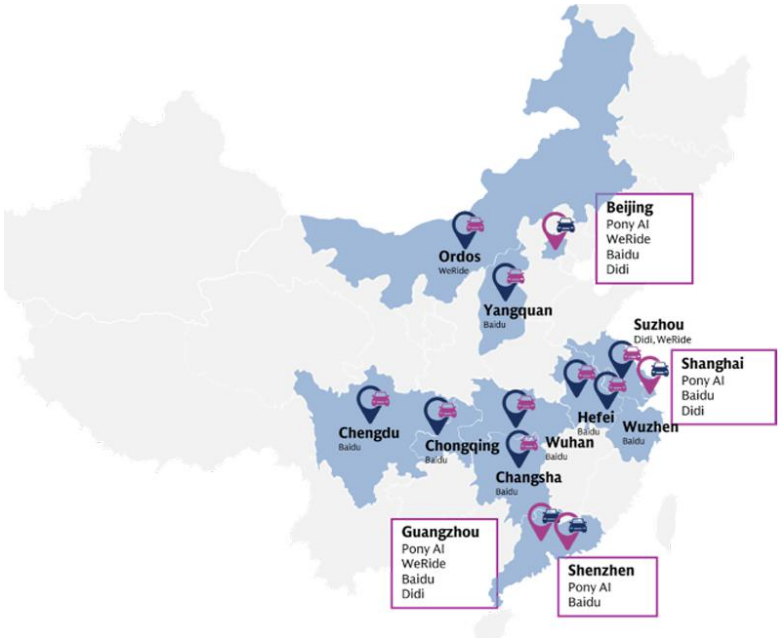
In Feb 2022, partnered with one of China`s largest logistic leader Sinotrans to form a smart logistic company called CYANTRON to providing AD-TaaS service in China. In July 2022, Pony.ai partnered with equipment manufacturer Sany Heavy Industry to mass produce autonomous driving trucks in China.

In January 2025, Pony becomes the first company in China to receive approval for robotruck platooning tests on cross-provincial highways connecting Beijing, Tianjin, and Hebei Province, marking a major milestone in the Company's pursuit of large-scale commercialization of autonomous trucking. This approval enables Pony.ai to operate robotrucks in a "1+N" platoon, with only the lead truck requiring a safety operator, and the following trucks operating autonomously.

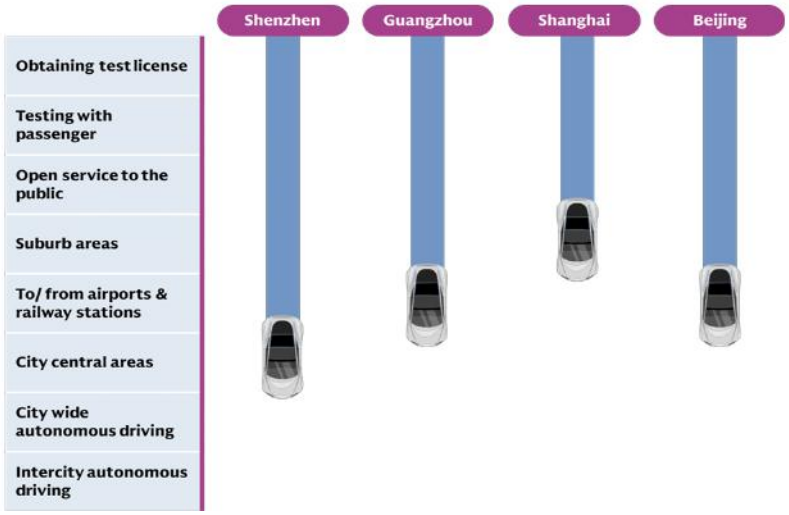
DVN-3 (Market): How do you see the deployment of Robotaxis in China? Who are the key-players, how many robotaxis are operating today and in which cities?

Robotaxis offer a convenient transportation and privacy compared to taxis, attracting a growing user base and demonstrating significant public acceptance. Moreover, the government's supportive policies and regulatory frameworks are crucial, fostering a safe and

encouraging environment. Cities like Beijing, Shanghai, Guangzhou and Shenzhen, and like Wuhan, Chongqing are at the forefront of this revolution.



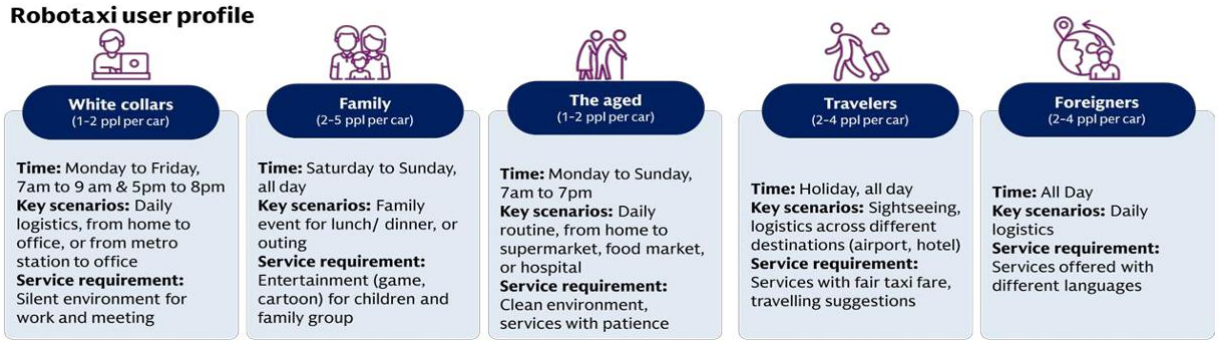
The government's proactive approach, marked by the release of policies that regulate autonomous vehicle technology, has played a pivotal role in shaping the industry's trajectory. The establishment of designated testing zones, such as the one in Beijing, further facilitates the development and deployment of these vehicles.

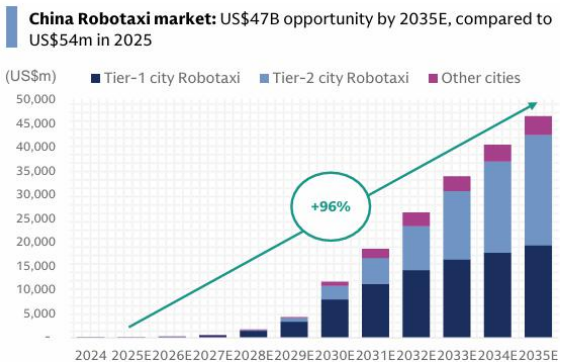


Key-players: the other big robotaxi player in China is Baidu-Apollo which is operating more than 1000 robotaxis compared with 300 at Pony.ai.


Baidu and Pony.ai robotaxis

In May 2025: Goldman Sachs published a study showing **500,000 Robotaxis** operating across 10+ cities in China by 2030, Goldman Sachs Research analysts believe the question is no longer if L4 autonomous technology is ready, but one of how companies will commercialize the rapid pace of autonomous development.
Is it realistic? All depends on the safety records, as we have seen with the accident of Cruise in the US.





DVN-4 (Regulation): Are there guidelines, regulations for L4 in China? Are there specific areas to operate robotaxis? What are the conditions of approval and operations (safety drivers, remote control?)? Are the operators allowed to collect money for the trips?

Hereafter a summary from the Goldmann Sachs report

National level policies			
Department	Policy name	Date (MM-YY)	Key points
State Council	The 14th Five-Year Plan for the Development of the Digital Economy	Jan-22	Provide systematic artificial intelligence services for key emerging fields such as government services, smart cities, intelligent manufacturing, **autonomous driving**, and language intelligence.
Ministry of Industry and Information Technology, Ministry of Public Security, Ministry of Housing and Urban-Rural Development, Ministry of Transport	Notice on the pilot work of intelligent connected vehicle access and road access	Nov-23	Select **intelligent connected vehicle products with autonomous driving functions** that meet the conditions for mass production and **carry out pilot projects**; for intelligent connected vehicle products that have obtained access, **carry out on-road driving pilot projects in limited areas.**
Responsibility for autonomous driving and accidents			
City	Policy name	Date	Key points
Shenzhen	Regulations on the Administration of Intelligent Connected Vehicles in Shenzhen Special Economic Zone	Jun-22	If a fully autonomous smart connected car violates road traffic safety laws while there is no driver, the responsibility goes to **the vehicle owner and manager.**
Shanghai	Regulations of Shanghai Pudong New Area on Promoting the Innovative Application of Driverless Intelligent Connected Vehicles	Nov-22	The company to which the driverless smart connected car belongs shall first pay compensation and may seek reimbursement **from the responsible autonomous driving system developers, car manufacturers, equipment providers**
Beijing	Beijing Autonomous Driving Vehicle Regulations	Jan-25	**Autonomous driving vehicle manufacturers** shall bear the main responsibility for the **quality and production consistency** of autonomous driving vehicles.
Supportive policies on road-test and commercialization			
City	Policy name	Date	Key points
Wuhan	Wuhan City Intelligent Connected Vehicle Road Testing and Demonstration Application Management Implementation Rules	Jun-22	Remote driving demonstration application refers to the demonstration application and commercial pilot of intelligent connected vehicles carrying people, cargo or special operations **with no human driver in the driving seat.**
Wuhan	Wuhan Regulations on Promoting the Development of Intelligent Connected Vehicles	Nov-24	Encourage the promotion and application of new technologies and products for intelligent connected vehicles, and **support road testing, demonstration applications, commercial pilots and commercial operations of intelligent connected vehicles**
Beijing	Ten measures to promote high-quality development of the intelligent connected vehicle industry	Nov-24	For demonstration applications in public service fields such as sanitation cleaning, urban management, convenience services, public transportation, travel services, and logistics distribution, **financial support of 6 yuan per kilometer will be provided based on the test mileage, with a maximum annual support amount of 3 million yuan per enterprise.**
Guangzhou	Guangzhou Regulations on the Innovation and Development of Intelligent Connected Vehicles	Jan-25	The city **supports intelligent connected vehicles to carry out commercial operations** based on sufficient verification through road testing and demonstration applications.

High-level national support:

In 2022, autonomous driving technology was listed in the 14th 'Five-Year Plan for the development of Digital Economy' by the state council. Back in 2023, four major ministries of the state established notice to promote the market and road access for autonomous driving vehicles.

Clarify the responsibility.

Local governments have been active in establishing policies on responsibilities for accidents, which some robotaxi players may have thought that was a major obstacle that had stopped the robotaxi from large scale development. For example in Shanghai, the government stated that the owner for the robotaxi should pay the compensation upfront and may seek reimbursement from system developers, car manufacturers, equipment providers. Only when responsibilities are clarified, Robotaxi players can accurately measure their operation risks and manage their fleet accordingly.

Supportive policies for road test and commercialization.

Local governments are open to road test, pilot operations and even full commercialization of robotaxi, providing a supportive environment. Wuhan has already started allowing driverless (no human driver in the driving seat) vehicles to conduct demonstration application in 2022; As of July 2025, the four major Tier-1 cities, namely Beijing, Shanghai, Guangzhou and Shenzhen, have all issued permits to some robotaxis companies, allowing them to carry out commercial driverless operations.

DVN-5 (Trucks): Pony.ai has also activities to support autonomous trucks? Do you expect this market to develop faster than the robotaxis? What is the timing plan for this application?

Pony started the R&D and testing of L4 Robotruck solution since 2019.
Depending on readiness and maturity of AI software, auto-grade sensors, computation platform as well as Truck platform readiness, Pony.ai has went through different phases of Robotruck development.
From late 2025, Pony.ai will start to deploy its 4th generation Robotruck, which willfeature the same hardware and software stacks as its 7th generation Robotaxi solution in China. These Robotrucks will be equipped with all automotive-grade sensors (for example, semi-solid lidars) and computing platform. Meanwhile, the truck platform will feature a redundancy chassis system as well (steering, braking, communication, power etc.).

DVN-6 (Safety): Could you tell us more about the safety performance of your robotaxis?

We believe insurance costs serve as an indicator of our robotaxis' safety performance. Consequently, our robotaxis fleet currently enjoys insurance cost approximately 50% lower than those of traditional taxis or ride-hailing fleets in China. This significant saving is a direct result of our recognized outstanding safety record and extremely low accident rate during daily operations.

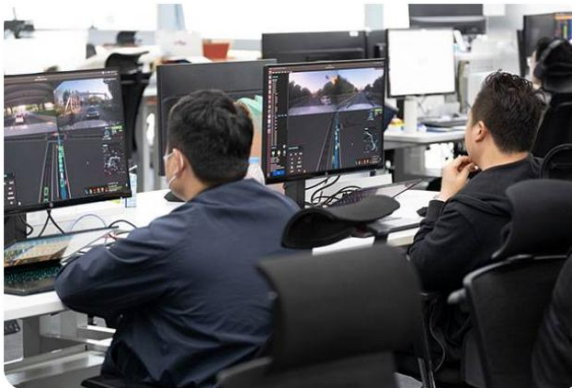
DVN-7 (ODD, remote Control): Could you tell us more about the ODD and impact of weather conditions? How do you do in case of specific events such as a robotaxi blocked on the road, can you control remotely your robotaxis?

Pony.ai's robotaxis operate in almost all weather conditions, except during extreme weather or heavy snow, leveraging camera and lidar sensor fusion technology.

Crucially, Pony.ai's technology methodology does not, and will not, include remote vehicle control by the assistance team. Instead, our system functions as a request-based remote assistant. Remote operators connect to an ADV (Autonomous Driving Vehicle) only if it encounters an extreme

situation, such as a road blockage. Even then, the remote assistant merely provides suggestions based on their observation; they cannot directly control the vehicle.

This approach is essential because L4 autonomy mandates no single point of failure. Consequently, systems reliant on human intervention or unstable internet connections must be excluded. Furthermore, as low-latency internet is not required, the cost of setting up and maintaining Pony.ai's remote assistance system is highly economical – utilizing standard internet connections and laptops.



DVN-8 (Sensing): Could you tell us more about the system & sensing architecture of your Gen7 versus Gen6? Which compute solution do you have (SoCs)? Are you using the C-V2X technology?

The sensing architecture on Gen7 which has recently started mass production and road testing includes 12 cameras,5 long-range or mid-range lidars and 4 blind-spot lidars, and a few radars.

The Gen-7 platform introduces key innovations, including the first use of 100% automotive-grade components, a 70% reduction in ADK hardware costs, and a scalable design compatible across multiple vehicle types. 2025 marks the “year of mass production” for Pony.ai, laying the groundwork for rapid expansion and broader deployment of robotaxi services in global markets.

Pony.ai`s L4 solution is making the ADV self-intelligent as much as possible. So don`t rely on any V2X technology or facilities.

- Examples of Driving Scenarios


Rush hour traffic
in Guangzhou


Rush hour traffic
in Guangzhou
green boxes represent cars, orange represents motorcycles or bicycles


Rush hour traffic
in Guangzhou
This is very common in dense urban areas in China


Rush hour traffic
in Guangzhou
Construction is under way - another common scenario we see on urban roads