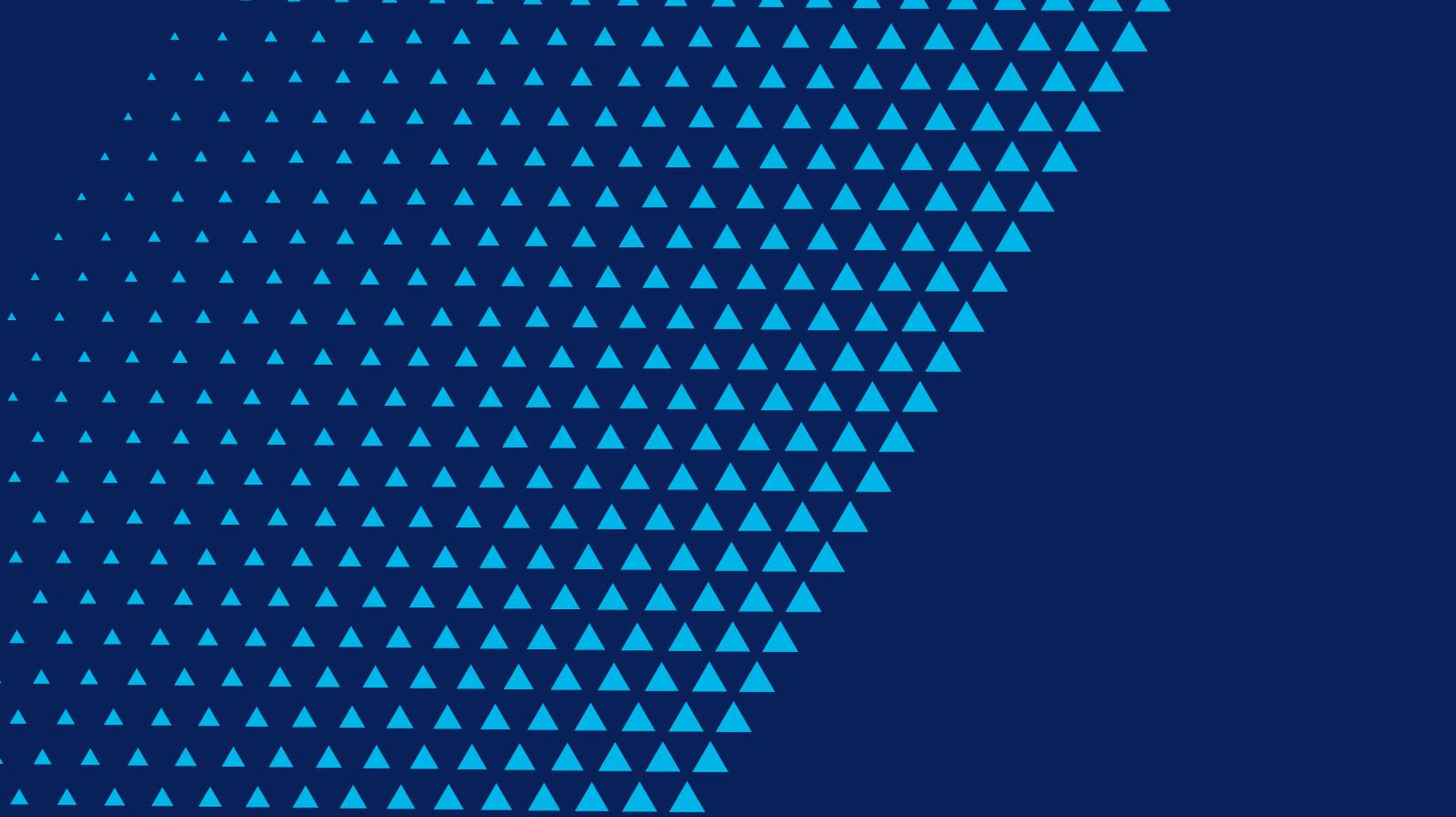


# Empowering mobility through technology:

Moto-hailing for safer and more equitable  
Latin American communities



## Our firm

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Access Partnership ([www.accesspartnership.com](http://www.accesspartnership.com)) is a global policy consulting firm with integrated expertise across many areas, including technology, government affairs, multilateral organizations, and sustainability.

Our Economics Strategy practice (formerly known as AlphaBeta) provides strategic advisory services to clients globally.

Our advisors are experts in both strategy and economics. We partner with clients from the private, public, and not-for-profit sectors to identify the forces shaping their markets and develop practical plans to create prosperity and well-being.

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### Important Notice on Contents — Estimations and Reporting

This report has been prepared by Access Partnership for DiDi (which operates as 99 in Brazil). Much of the information in this report has been derived from or estimated by Access Partnership analysis using both non-DiDi proprietary and publicly available information. DiDi has, in some instances, supplied internal data for the report. In these instances, the data has been attributed to the relevant source in the footnotes.

The financial figures in this report are estimated in US dollars. Conversions, where applicable, are based on the average year-to-date exchange rates for the period of January 2024 to May 2024, which are as follows:

- 1 USD = 5.02 BRL
- 1 USD = 16.92 MXN
- 1 USD = 3,895 COP

The conclusions and opinions expressed are exclusively those of Access Partnership.

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# Moto-hailing has generated benefits for users, drivers, and wider society in Latin America

## 1 ▶ Moto-hailing has reduced mobility costs for **users** and enabled better access to economic opportunities



Moto-hailing services can reduce the cost of mobility by **about USD 4,000** annually, equivalent to **about 20%** of average household income



Since using moto-hailing, **over 98%** have seen a reduction in their travel time. Annually, this is equivalent to **over 100 hours** saved per commuter



**59% and 68%** of users in São Paulo and Mexico City, respectively, would be keen to use moto-hailing services if available in their city

## 2 ▶ Moto-hailing has provided **drivers** with more flexible income-earning opportunities, empowering them to support their families



**Over 60%** of DiDi/99 moto-hailing drivers are the sole breadwinners in their households, supporting **more than 3** dependents in their respective households



**Over 65%** of DiDi/99 moto-hailing drivers have seen an increase in income since becoming a driver, with this increase being up to **40%**

## 3 ▶ Moto-hailing has reduced time-related commuting costs for **wider society** while ensuring safety



Moto-hailing is helping to reduce the time-related costs of commuting by up to **USD 2.8 billion**, equivalent to over **3%** of city GDP



Over **99.9%** of DiDi/99 moto-hailing trips happen without any incident



More than **80%** of users do not have safety concerns when using DiDi Moto/99Moto services, with up to **90%** of women sharing this sentiment

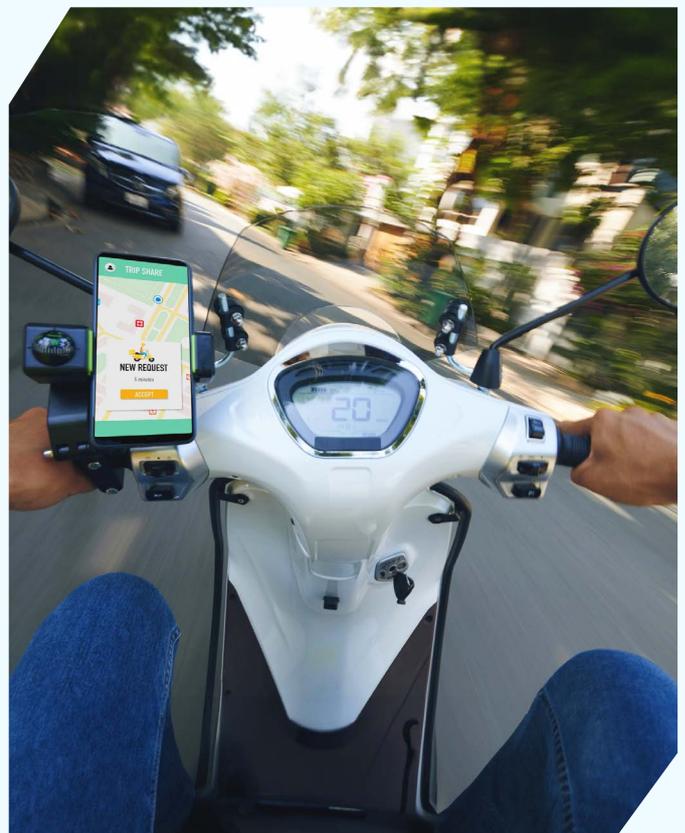
# Executive summary

Moto-hailing services, which connect people (“users”) with motorbike drivers (“drivers”) through digital platforms (i.e., mobile applications), offer a convenient and efficient mode of transportation in many cities, particularly in Latin America. However, regulatory developments have not kept pace with changes in the mobility landscape. This has resulted in such services only being made available in limited cities and countries. Having access to a fact base on the benefits of moto-hailing is crucial, potentially helping policymakers ensure that regulations are suitable for and supportive of moto-hailing. By contrast, restrictive regulations could prevent benefits from being unlocked in more cities.

This report explores the current and future role of moto-hailing services in shaping Latin America’s transportation landscape across four cities. We focus on two cities where DiDi already has moto-hailing operations (Bogota and Rio de Janeiro) and two prospective cities where moto-hailing services are not yet available (Mexico City and São Paulo), assessing how these services benefit users, drivers, and wider society. The main findings include:

## 1. Moto-hailing reduces costs for users and enables access to economic opportunities:

These services provide users with an affordable mobility solution, allowing them to reduce their overall spending on transportation. Compared to other modes of transportation, such as owning a personal car, it is estimated that moto-hailing could save users about USD 4,000 annually (in the case of Rio de Janeiro), equivalent to about 20% of average household income. Moto-hailing also plays a key role in enabling access to mobility, boosting economic participation among marginalized groups by providing safe, reliable,



and around-the-clock travel. For instance, over 60% of trips are made to or from low or middle-income areas, while over 20% are to areas not currently connected by public transit.

## 2. Moto-hailing provides drivers with more flexible income-earning opportunities to support their families:

Drivers have the autonomy to decide their own working hours based on personal and professional commitments and can adjust active driving hours to maximize their income. Among DiDi/99 moto-hailing drivers, over 60% are the

sole income source for their households, with more than half of their income coming from moto-hailing. Almost nine in 10 of these drivers also owned their motorbikes prior to becoming a driver, highlighting how bike ownership has provided them with supplementary income without having to finance new loan payments for the vehicle. This also avoids adding to vehicle ownership and congestion. Since becoming moto drivers, over two-thirds have seen an increase in their income, as well as other benefits, such as improved financial independence (e.g., performing more bank transactions and using their credit/debit cards more frequently).

- 3. Moto-hailing reduces time-related commuting costs for wider society while safeguarding road users:** Since using moto-hailing services, many users have adjusted their travel patterns; most notably, to reduce the usage of personal vehicles, such as cars and motorbikes. This trend has contributed positively to reduced congestion on roads, resulting in annual savings of USD 2.8 billion and USD 2.4 billion in Bogota and Rio de Janeiro, respectively, due to lower time-related commuting costs. These savings are equivalent to over 3% of city gross domestic product (GDP). In fact, based on our surveys, 15-18% of users appear to have increased their use of public transport, which is corroborated by trip data showing that two in 10 moto-hailing trips made are multi-modal. DiDi has also been committed to improving the safety of all stakeholders (users, drivers, and other road users) through its comprehensive in-app features. This has minimized any safety incidents, with over 99.9% of moto-hailing rides taking place without incident over the second half of 2023.

**Box E1: Even in cities where moto-hailing services are not yet available, there appears to be strong demand and potential for benefits to be unlocked**

In two cities where moto-hailing services are not yet available (Mexico City and São Paulo), sentiments toward the service appear to be positive among both prospective riders and drivers. In the case of Mexico City, our estimates show that moto-hailing could reduce the costs of commuting by up to 25% of average annual household income. Furthermore, 68% and 59% of respondents in Mexico City and São Paulo, respectively, have expressed that they would be keen to use the service if it became available.

Among the general population, 60% and 45% of respondents in the two cities also highlighted that they would consider becoming a moto-driver to earn additional income, with our estimates showing that moto-hailing services could generate opportunities for about 20,000 drivers in each city should they be made available.

Moving forward, it is important for policymakers to recognize the benefits that moto-hailing services are already helping to create, understand how concerns are being addressed, and work closely with stakeholders to ensure that a conducive regulatory environment is in place to build a resilient and equitable urban transport ecosystem for all.

# 1. Introduction:

## The state of moto-hailing in Latin America

Mobility allows individuals to safely gain access to a spectrum of economic opportunities by enabling them to connect with job markets, educational institutions, healthcare facilities, and various other essential services critical for socioeconomic advancement. Studies consistently underscore the pivotal role of efficient transportation networks and modalities in facilitating this access, highlighting how limitations in mobility can disproportionately affect marginalized communities by hindering their ability to participate fully in economic activities.<sup>1</sup>



Consequently, initiatives that optimize urban mobility, such as on-demand transportation platforms, facilitated by technologies like ride-hail and moto-hail, emerge as catalysts for economic inclusivity and prosperity.

These platforms effectively bridge geographical barriers by providing affordable, reliable, and convenient transportation options, empowering individuals to seize opportunities that might otherwise be out of reach.

However, the regulatory framework to enable these benefits remains lacking in some areas, especially for up-and-coming approaches that have yet to fully leverage technology. One such example is moto-hailing, an on-demand transportation option where users are connected to motorbike drivers through

mobile applications, offering a convenient and affordable way for users to commute.<sup>2</sup>

Moto-hailing services currently operate across various modes and formats in a fairly nascent manner, as there is a general lack of understanding of such transport modalities. Although app-enabled moto-hailing is a relatively more recent development, offline moto services have long existed and operated in various forms. By integrating technology, apps like DiDi/99 have enhanced convenience, efficiency, affordability, and safety in a manner similar to the transformation seen with app-enabled ride-hailing for cars.

Despite this, a general lack of understanding has produced uncertainty among policymakers who may not be adequately informed on the benefits of the service. For instance, there has been pushback against moto-hailing services in some markets, with several cities calling for bans. While such services are generally permitted in several Southeast Asian countries (e.g., Thailand, Indonesia, and Vietnam) and other markets, such as India, there are fairly strict restrictions in Western markets, the Middle East, and some Latin American countries.<sup>3</sup>

Such a stance tends to overlook the wider benefits that moto-hailing can generate, especially where the coverage of public transportation networks may be limited. In such cases, moto-hailing has been shown to be capable of bridging this gap and providing users with a low-cost and reliable modality for mobility while ensuring the safety of users and drivers alike. Even in cities where moto-hailing services are not available, over half of the population appears to show a high degree of openness to explore the use of such services should they be

made available. While common concerns regarding moto-hailing include its impact on road safety and how it may affect the usage of other transport modalities, such as public transit or taxis, solutions to these issues are actively being explored in markets globally.

**This report seeks to understand the actual and potential impacts of moto-hailing in Latin America,** with a focus on its current and potential impacts in four key cities from the perspectives of three user groups: users, drivers, and wider society. The focus cities (as seen in Exhibit 1) comprise two cities where DiDi already has moto-hailing operations (through the DiDi app in Bogota and 99 app in Rio de Janeiro) and two prospective cities where moto-hailing services are not yet available (Mexico City and São Paulo).<sup>4</sup>

Latin America offers a particularly interesting perspective on moto-hailing services, given that personal motorbike use is already a dominant transportation mode. Motorbikes have become

increasingly popular in the region in recent years, with up to 30% of Brazilian households owning a two-wheeler – the highest in the region and an over 800% increase compared to 20 years ago.<sup>5</sup> However, it appears that significant barriers still exist before policymakers embrace the benefits of moto-hailing platforms.

Our analysis leverages a range of data sources, including desktop research, internal data provided by DiDi, a geospatial analysis of publicly available data on metrics such as public transit stops, and surveys of moto-hailing users, drivers, and prospective users conducted in 2024 across the four focus cities.

The objective of this report is to provide a robust fact base that policymakers can leverage to understand the tangible benefits of moto-hailing services and how they can best unlock these through the right policies. This will improve citizens' mobility and enable them to access added opportunities. The report also touches on common concerns related to moto-hailing and existing efforts to address them.

### Exhibit 1: Overview of cities covered in our report



## 2. Enabling access to new opportunities for users

Moto-hailing is already beginning to transform the way people move in their cities daily, including for commutes. This chapter explores the economic benefits that moto-hailing brings to users, particularly by lowering the costs of mobility and improving access to transportation, unlocking broader economic opportunities.

### 2.1 Moto-hailing lowers the cost of mobility for users

#### Cities with moto-hailing operations

Moto-hailing services have transformed urban transportation by offering affordable mobility solutions to users. These platforms provide competitive pricing compared to alternative modes of transport, allowing users to reduce their overall transportation expenditure. This is corroborated by findings from our surveys, which show sizable reductions in users' everyday transportation spending following their adoption. In Bogota and Rio de Janeiro, 30% and 35%, respectively, of moto-hailing users have seen a reduction in their transportation expenditure since they started using the service, with their spending falling by up to 35%. Users have also highlighted that cost savings are one of the top reasons they choose to use moto-hailing services, a sentiment shared by 53% and 65% of survey respondents in Bogota and Rio de Janeiro, respectively.

Our estimates also show that moto-hailing services tend to cost less than other modes of transportation in general. For instance, moto-hailing eliminates the need for hidden costs that private vehicle ownership tends to entail, such as maintenance fees and insurance premiums, in addition to an often-hefty

downpayment and monthly loan repayments. Exhibit 2 below illustrates the extent to which moto-hailing could lower users' annual mobility costs relative to other modes of transportation.



Compared to owning a personal car, the annual cost savings of about USD 4,000 are equivalent to up to 20% of the average household income across the two cities.<sup>6</sup>

This highlights the significant monetary benefits that users could unlock if they choose to shift from personal vehicle ownership and taxi usage to moto-hailing.

#### Exhibit 2: Cost of moto-hailing compared to other transportation modes in cities with moto-hailing

Annual cost savings (USD and as a share of average household income) compared to:	Bogota	Rio de Janeiro
Owning a personal car	4,100 (20% of income)	4,000 (19% of income)
Owning a personal motorbike	600 (3% of income)	200 (1% of income)
Using taxi services	1,800 (9% of income)	600 (3% of income)

Source: Access Partnership analysis and surveys.

## Cities that can benefit from moto-hailing

Even in cities where moto-hailing services may not yet be widely available, it is estimated that moto-hailing has significant potential to unlock cost savings for users. As seen in Exhibit 3 below, compared to alternative modes of transportation, our estimates show that the cost of mobility could be similarly lowered significantly for users if they had access to moto-hailing services.

### Exhibit 3: Cost of moto-hailing compared to other transportation modes in cities without moto-hailing

Annual cost savings (USD and as a share of average household income) compared to:	Mexico City	São Paulo
Owning a personal car	4,400 (25% of income)	4,200 (18% of income)
Owning a personal motorbike	100 (1% of income)	500 (2% of income)
Using taxi services	1,400 (8% of income)	900 (4% of income)

Source: Access Partnership analysis and surveys.

## 2.2 Moto-hailing complements public transit and enables users to optimize their travel routes

Beyond cost savings, moto-hailing also provides users with more choice over their travel routes, particularly due to how it complements public transit. In many Latin American cities, several gaps exist within the traditional public transit systems, including inadequate infrastructure, inefficient operations, and limited service hours, as seen in Exhibit 4.<sup>7</sup> These have created challenges in mobility for users, which could potentially be bridged through the complementarity that moto-hailing provides with public transit networks.

### Exhibit 4: Top issues respondents face with public transit in their cities

Share of respondents who agree or strongly agree that they face each constraint

Issue/City	Bogota	Rio de Janeiro	Mexico City	São Paulo
I take too long to reach my destination using public transit	79%	76%	60%	60%
Public transit is too crowded	61%	56%	51%	54%
Public transit timings are unreliable and service hours are limited	34%	52%	37%	37%

Source: Access Partnership analysis and surveys.

## Cities with moto-hailing operations

In cities with moto-hailing operations, the service has played a key role in boosting first and last-mile connectivity, which particularly benefits users who live in metropolitan areas or areas not well-connected by public transit. Moto-hailing enables commuters to connect with public transit stations, such as bus stops and metro stations, making their journeys more seamless. Users also have more choice and autonomy over their travel options and can choose the modality that best suits their needs. Exhibit 5 illustrates the share of trips in Bogota and Rio de Janeiro that begin or end within 100 meters of a public transit station, with a sizable share of these trips likely to feed into journeys made with the public transit network. This is corroborated by survey data showing that more than two in 10 moto-hailing trips made are multimodal.



**Exhibit 5:**  
**Moto-hailing trips feeding into public transit networks in cities with operations**

Trip demographic/City	Bogota	Rio de Janeiro
Share of trips that begin or end within 100m of a public transit station	48%	35%
Multimodal trips that connect to public transit networks	20%	26%

Source: DiDi internal data, Access Partnership surveys.

**Cities that can benefit from moto-hailing**

In Mexico City and São Paulo, more than half of respondents agreed that there are currently insufficient transportation options to commute around the city, while more than 60% were not satisfied with the existing options.

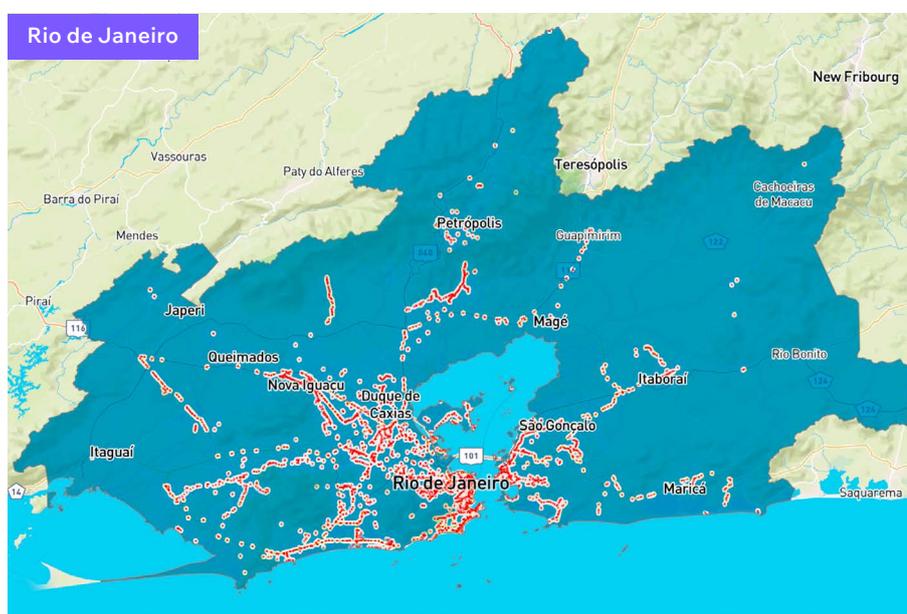
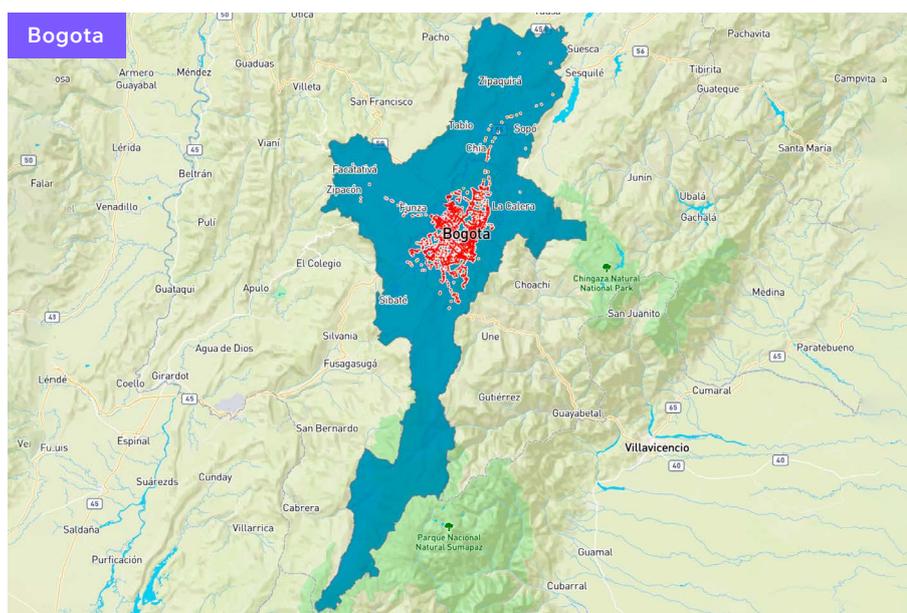
This highlights the potential opportunity for moto-hailing services to bridge these gaps by similarly complementing existing public transit networks. Respondents in these cities also appear open to usage of the service, with 68% and 59% of respondents in Mexico City and São Paulo, respectively, saying that they would be keen to use a moto-hailing service if it was formally available.

**2.3 Moto-hailing improves access to economic opportunities for users**

**Cities with moto-hailing operations**

Wider metropolitan areas beyond the main city also appear to be lacking in extensive public transit infrastructure, as seen in Exhibit 6, with individuals sometimes only having a single mode of transport that they can rely on for commuting. In these cases, moto-hailing plays an important role in enabling access to mobility, facilitating economic participation and boosting empowerment among various segments of society. For instance, in

## Exhibit 6: Overview of public transit connectivity in Bogota and Rio de Janeiro



● Public transit stops<sup>a</sup>    ● Underserved areas for public transit<sup>b</sup>

- Data on these public transit stops has been retrieved from OpenStreetMap. In our analysis, we have considered only formal modes of public transit and their official stops as delineated on OpenStreetMap.
- These areas consist of a set of points that are made up of residential roads, buildings, and land usages as identified on OpenStreetMap. Underserved is defined as a distance of 500m or more to the nearest public transit stop, in accordance with connectivity definitions provided by the UN-Habitat and The Institute for Transportation and Development Policy (ITDP).

the case of Bogota, over one million individuals live in wider metropolitan areas outside the main city, and 77% of this population commute daily, mostly to the main city center.<sup>8</sup> This outlines the sizable potential user base that benefits from access to moto-hailing.

In Bogota and Rio de Janeiro, moto-hailing services are already helping to fill this gap by providing a reliable, on-demand transportation option that users adopt for a variety of purposes.



Most commonly, more than 70% of moto-hailing service users make trips to their places of employment or other professional appointments.

This underscores the critical role of moto-hailing in accessing employment opportunities and supporting users' families. Furthermore, moto-hailing is also often used for personal leisure trips, visiting family, and accessing healthcare services, outlining its far-reaching benefits for users across all demographics.

**Box 1: DiDi's moto-hailing services improve access to mobility, particularly for women**

**Mónica's DiDi Moto experience: convenience, safety, and a personal connection (Bogota)<sup>9</sup>**

Mónica is a 34-year-old audiovisual producer in Bogota, Colombia, with a passion for sports, including running, swimming, and cycling. She used to ride a bike regularly but is now refraining from it after suffering an injury. Since August 2023, she has been utilizing DiDi Moto as her preferred mode of mobility. While having previously been a user of DiDi Express and other ride-sharing apps, Mónica found that DiDi Moto offered a superior experience, particularly for commuting to work or enjoying evenings out. She emphasizes the convenience and speed of DiDi Moto, stating it has made her life a lot easier. Mónica stresses safety as the primary motivator for her preference for DiDi Moto. She particularly appreciates how the lease service allows her to foster relationships with her user lessors,<sup>10</sup> resulting in engaging conversations and a sense of connection that she finds lacking when using traditional car lease services. This personal interaction adds value to her overall mobility experience.

**Francine's 99Moto experience: safety, affordability, and support (Rio de Janeiro)<sup>11</sup>**

Francine, a journalist and entrepreneur residing in Rio de Janeiro, Brazil, relies on 99Moto for its affordability, particularly for her commute to and from metro stations. She emphasizes feeling safer, especially during night travel or in dimly lit areas where walking might pose risks, such as when carrying valuable items like her notebook. Francine feels more supported and at ease when she uses the platform compared to alternative transportation options. She also highlights the considerable cost savings from using 99Moto, although this value tends to vary weekly depending on the fare whenever she books a ride.



As highlighted in Exhibit 7, a sizable proportion of moto-hailing trips are made to low and middle-income areas, as well as regions where public transit may not be easily accessible. This illustrates how moto-hailing can empower users to overcome geographical barriers to foster inclusivity and integration, particularly for individuals who may live in areas where it is challenging for them to easily access education or employment activities (such as wider metropolitan areas highlighted above).<sup>12</sup>

In addition, a notable share of trips is also made during times when public transport may not be operational, making it the cheapest accessible option for individuals to get to their desired destination (apart from traveling on foot, which may be impractical or pose safety concerns).

**Exhibit 7:  
Trip demographics for cities with moto-hailing operations**

Trip type/City	Bogota	Rio de Janeiro
Trips made to or from low and/ or middle-income areas <sup>a</sup>	63%	73%
Trips made to or from areas underserved by public transit <sup>b</sup>	20%	59%
Trips made during times when public transit is non-operational (i.e., 11pm-6am)	7%	10%
Trips made beyond the main city (i.e., to wider metropolitan areas)	7%	51%

a. Low and middle-income areas are defined as the bottom two-thirds of the city based on household income.

b. Areas underserved by public transit are defined as being 500m or more to the nearest formal public transit stop.

Source: DiDi internal data, Access Partnership surveys.

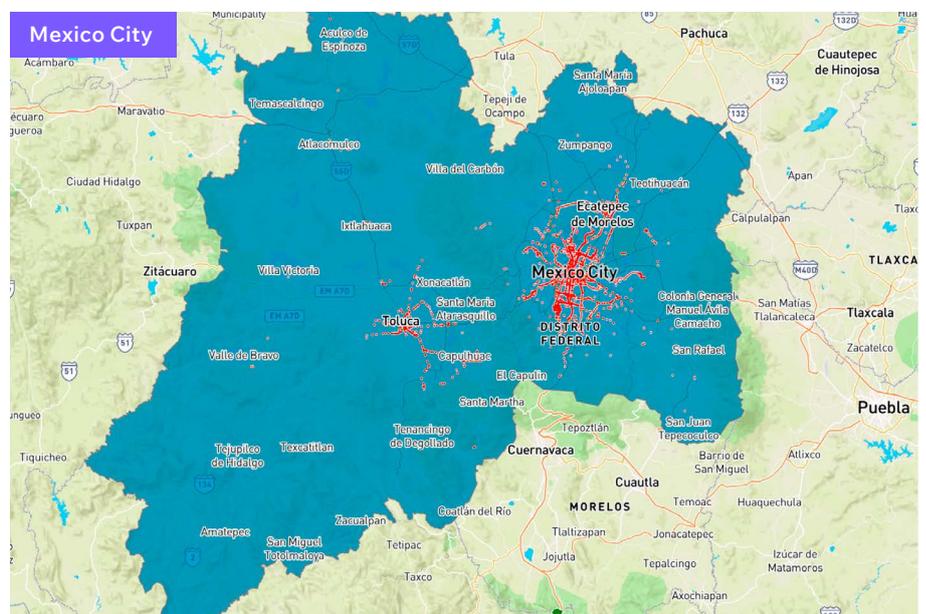
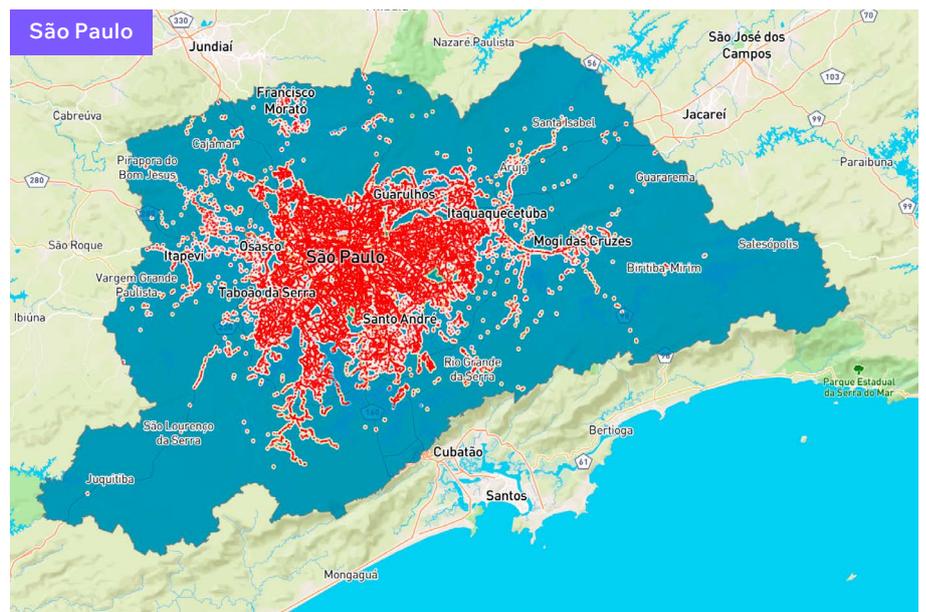


## Cities that can benefit from moto-hailing

This is further supported by analysis showing that similar gaps exist in public transit networks, particularly in wider metropolitan areas (Exhibit 8), which could make it challenging for individuals to commute.



## Exhibit 8: Overview of public transit connectivity in Mexico City and São Paulo



● Public transit stops<sup>a</sup> ● Underserved areas for public transit<sup>b</sup>

a. Data on these public transit stops has been retrieved from OpenStreetMap. In our analysis, we have considered only formal modes of public transit and their official stops as delineated on OpenStreetMap.

b. These areas consist of a set of points that are made up of residential roads, buildings, and land usages as identified on OpenStreetMap. Underserved is defined as a distance of 500m or more to the nearest public transit stop, in accordance with connectivity definitions provided by the UN-Habitat and The Institute for Transportation and Development Policy (ITDP).



## 2.4 Moto-hailing brings about time savings for users

### Cities with moto-hailing operations

Users also enjoy shorter travel times through moto-hailing, with 90% of respondents in Bogota and Rio de Janeiro citing this as their top reason for using the service. The basic travel demographics of these users are summarized in Exhibit 9 below.

Since adopting moto-hailing services, their daily travel time has been reduced by up to 36% in Bogota and 41% in Rio de Janeiro.

#### Exhibit 9: Basic travel demographics of moto-hailing users

Metric/City	Bogota	Rio de Janeiro
Average number of trips made weekly (#)	11.0	10.7
Average daily travel time (mins)	51.3	37.1

Source: Access Partnership surveys.



These are sizable daily time savings of 29 minutes and 26 minutes in Bogota and Rio de Janeiro, respectively (equivalent to 109 hours and 105 hours saved per commuter annually).

With this time saved, users are free to engage in more value-adding activities, such as exercising, upskilling, and spending time with their loved ones. For instance, the time saved could be sufficient for an individual to pick up a new skill through a beginner-level course. Overall, users can prioritize other activities that better contribute to their personal growth and development.

### Cities that can benefit from moto-hailing

Among respondents in Mexico City and São Paulo, over 80% feel that the time savings from moto-hailing would be the most important deciding factor influencing their decision on whether they would use the service.

# 3. Expanding income opportunities for drivers through moto-hailing

Moto-hailing platforms have transformed urban transportation for users and created significant economic opportunities for drivers. DiDi's moto-hailing services are currently enabling over 25,000 user lessors in Bogota and more than 50,000 drivers in Rio de Janeiro to gain access to an income-earning opportunity. This chapter delves into how moto-hailing benefits drivers, such as the autonomy it gives them in income generation and its role in fostering inclusivity.

## 3.1 Moto-hailing empowers drivers by providing them with the opportunity to earn income flexibly

### Cities with moto-hailing operations

Moto-hailing offers drivers a flexible means of earning income, providing them with autonomy over their active hours. Over 60% of drivers in Bogota and Rio de Janeiro have cited flexibility as a main reason for becoming a moto driver, in addition to their enjoyment of the activity and the independence they have in the role. This structure has been particularly advantageous for drivers who may have other personal commitments, such as family responsibilities or other income-earning activities. Drivers can choose their own active hours based on factors such as user demand, traffic conditions, or personal preferences, ensuring optimal income-generating opportunities.

As seen in Exhibit 10, moto-hailing is the primary source of income for drivers and their dependents. Furthermore, almost nine in 10 drivers in both cities also owned their motorbike prior to working in moto-hailing, outlining how this service has provided them with an avenue to earn income from their bike ownership, monetizing their asset ownership.

**Exhibit 10:**  
Demographics of moto-hailing drivers

Demographic/City	Bogota	Rio de Janeiro
Sole breadwinners of their household	60%	67%
• Share of these respondents for whom moto-hailing is their sole income source	59%	56%
• Average number of dependents supported among sole breadwinners	3.7	3.2

Source: Access Partnership surveys.

On the other hand, some drivers engage in moto-hailing for supplementary income, which helps to enhance their financial stability and independence. This can be attributed to the overall enjoyment of moto-hailing among drivers in general, a sentiment shared by over one-third and close to two-thirds of respondents in Bogota and Rio de Janeiro, respectively.



Drivers have seen significant tangible benefits since becoming moto-hailing drivers with DiDi/99, with 66% and 78% of respondents citing income increases of 18% and 40%, respectively, in Bogota and Rio de Janeiro.



Drivers are also generally satisfied with DiDi Moto/99Moto’s offerings; in particular, the flexibility it accords them, as illustrated in Exhibit 11. Drivers also value being able to make weekly, rather than monthly, earnings, which allows them to better manage their cash flow and provides greater financial flexibility, particularly for those who are sole breadwinners.

**Exhibit 11:**  
**Top benefits for moto-hailing drivers**  
*Share of respondents who are satisfied or very satisfied with DiDi Moto/99Moto’s offerings*

Benefit/City	Bogota	Rio de Janeiro
The flexibility of being able to choose their own active hours	66%	78%
The flexibility of being able to generate money whenever they want/need	66%	78%
The ability to make weekly, rather than monthly, earnings	64%	81%

Source: Access Partnership surveys.

**Box 2: Moto-hailing driver insights in Argentina**

There are several shared characteristics between moto drivers in our two cities and other cities where DiDi’s moto-hailing operations are available.<sup>13</sup> In Buenos Aires, Argentina, 61% of drivers are the sole breadwinners in their households. In addition to the flexibility and independence that being a driver provides, 68% of respondents also chose to become a moto driver for personal development (i.e., they were unable to find better opportunities or wanted to improve their work-life balance). 60% of drivers have also seen an increase in income since they started driving.

Among these cities, drivers also value similar advantages offered by DiDi, such as flexibility and independence. Close to 70% of drivers in Buenos Aires are satisfied with the flexibility benefits the platform accords them, such as the ability to generate income whenever needed (49%) and being able to choose whether to accept or reject requests (49%).

**Box 3: Moto-hailing provides drivers with the opportunity to improve their economic circumstances**

**Eider’s story: From debt to dreams with DiDi Moto (Bogota)<sup>14</sup>**

Eider, who currently lives in Bogota, Colombia, embarked on a new journey as a full-time moto user lessor by connecting with the DiDi app in March 2023. This ability to generate income has transformed his life by enabling him to pay off existing debts and support his family of five. Just seven months after becoming a user lessor, Eider was able to save enough to purchase a new motorbike, in addition to being able to fund English classes for his wife, who works at a call center. His goal is to save up enough to take his family on a trip to Santa Marta, the seaside city in which he was born. Eider’s story serves as a testament to how leasing moto services can create opportunities for families and uplift their situations.



**Cities that can benefit from moto-hailing**

In cities where moto-hailing services are not yet available (Mexico City and São Paulo), there is potential for these services to similarly support livelihoods for drivers. Our estimates show that moto-hailing services could generate opportunities for about 20,000 drivers in each city, should they be made available.

**In addition, there appears to be keen interest among the general population; namely, 60% and 45% of respondents, respectively, are interested in becoming a moto-driver to earn additional income, should the service be made available.** This highlights that there is likely to be a sizable pool of potential drivers that can be tapped into.

**3.2 Moto-hailing creates wider social and financial inclusion benefits for drivers**

**Cities with moto-hailing operations**

In addition to offering drivers flexible income-earning opportunities, moto-hailing also enables wider social and financial inclusion benefits for drivers. In Bogota and Rio de Janeiro, DiDi’s moto-hailing services currently support the financial inclusion of close to 2,000 drivers in each city – referring to drivers who did not previously

have access to a bank account. Since becoming a driver, many individuals have seen increased access to financial services, not only through their bank accounts but through other avenues, such as digital payment services, empowering them to manage their finances more effectively and independently. In Bogota and Rio de Janeiro, 47% and 65% of respondents, respectively, feel that they have become more financially independent since becoming moto-drivers with DiDi/99, in addition to other benefits, as illustrated in Exhibit 12.

**Exhibit 12:** Financial inclusion benefits for moto-hailing drivers  
*Share of respondents who engage in each activity more regularly*

Activity/City	Bogota	Rio de Janeiro
Use bank account more actively	37%	67%
Make more transactions on debit/credit cards	23%	49%
Make more online banking transactions	32%	57%

Source: Access Partnership surveys.

# 4. Boosting efficiency and safety within the transport ecosystem

Beyond its benefits to users and drivers, moto-hailing also contributes to wider societal welfare. This chapter examines how these services improve efficiency within the transport ecosystem by generating time savings while ensuring safety on the roads.

## 4.1 Moto-hailing reduces congestion and generates time savings

Moto-hailing services play a pivotal role in alleviating congestion on roads, particularly in urban cities where congestion is a huge issue. These services help to optimize transportation efficiency and provide users with an avenue to commute optimally. According to the INRIX 2022 Global Traffic Scorecard, Bogota is the sixth most congested city globally, with the average commuter losing a staggering 122 hours annually from being stuck in traffic.<sup>15</sup>

While this issue is most pronounced in Bogota, research shows that similar challenges are shared by other Latin American cities, such as Mexico City (74 hours) and São Paulo (56 hours).<sup>16</sup> Our estimates show that moto-hailing services can bring about significant benefits in this regard by providing users with a more efficient means of transportation. In both Bogota and Rio de Janeiro, access to moto-hailing services has generated annual savings of USD 2.8 billion and USD 2.4 billion, respectively, by enabling more efficient trips. This is equivalent to 3.1% and 3.4% of the city GDP in Bogota and Rio de Janeiro, respectively.

### Box 4: Economic impact of 99Moto services in Brazil<sup>17</sup>

Beyond reducing congestion, moto-hailing services also generate broader economic benefits. External research conducted by FGV highlights that 99Moto's services had a tangible positive impact in Brazil in 2023, both directly and indirectly. It is estimated to have supported over BRL 5 billion (USD 1 billion) in economic activity (equivalent to 0.05% of the country's GDP), over BRL 2 billion (USD 0.4 billion) in income, BRL 461 million (USD 92 million) in taxes on goods and services, and over 114,000 employment opportunities.<sup>18</sup> These benefits are sizable, with the GDP benefit equal to or greater than the GDP of 95% of Brazilian municipalities, and the income benefit greater than the total amount spent on the Bolsa Familia program<sup>19</sup> on a monthly basis in the state of São Paulo.<sup>20</sup>

Rio de Janeiro also saw the largest benefit across the states, with approximately BRL 872 million (USD 174 million) in GDP boosts and over 12,000 jobs supported.



Among commuters, there have also been observed changes in travel patterns since the adoption of moto-hailing services. Exhibit 13 shows how users in the two cities with moto-hailing operations have changed their usage of different travel modalities, particularly by reducing personal vehicle trips and increasing their usage of public transit.

**Exhibit 13:**  
**Changes in travel patterns following the use of moto-hailing services**

*Share of respondents who have adjusted their travel patterns accordingly*

Mode	Change in usage	Bogota	Rio de Janeiro
Personal car trips	Reduced number of trips	37%	41%
	No longer make such trips	7%	7%
Personal motorbike trips	Reduced number of trips	17%	21%
	No longer make such trips	10%	9%
Public transit trips	Make more of such trips	15%	18%
Multimodal journeys	Make more of such trips	10%	9%

Source: Access Partnership surveys.

In the longer term, the availability of moto-hailing services could potentially have similar flow-on effects in cities that do not currently have moto-hailing by reducing the need for personal vehicle ownership.

As a result of reduced personal vehicle usage, moto-hailing could also offer the added benefit of alleviating the need for parking spaces in cities, which has previously been observed with ride-hailing.<sup>21</sup> With fewer individuals choosing to drive their own cars or motorbikes into the city center, the strain on limited parking resources could be mitigated, generating more optimal use of urban spaces.<sup>22</sup> This can help encourage more sustainable mobility options while enhancing the overall livability of cities.

**4.2 Moto-hailing helps promote safe commutes**

Road safety is a significant concern in Latin America, where traffic incidents are prevalent. For instance, looking at road fatalities alone, Colombia sees 4.5 fatalities per 10,000 vehicles, while Brazil ranks fifth in the world for traffic deaths, with the latest available data indicating a mortality rate of about 16 per 100,000 inhabitants.<sup>23</sup>

DiDi has been actively taking steps to improve the safety of users by implementing various measures and features for their protection. This is supported by the positive responses from riders (including women), who highlight that they place high levels



of trust in the platform’s moto-hailing services, as seen in Exhibit 14. Furthermore, 53% of respondents in both cities feel that DiDi Moto/99Moto’s services are as safe as or safer than alternative modes (such as booking through offline or informal platforms). This confidence is reflected in the high rating that users in Bogota and Rio de Janeiro give to drivers, at an average of 4.91 (out of 5).

**Exhibit 14:**  
**Sentiments regarding safety among riders in cities with operations**

*Share of respondents who strongly agree, agree or are neutral*

Metric/City	Bogota	Rio de Janeiro
Respondents who do not have any safety concerns when using DiDi Moto/99Moto’s services	88%	81%
• Female respondents who share the same sentiment	90%	79%

Source: Access Partnership surveys.

Drivers also expressed positive sentiments, with 56% of respondents in Rio de Janeiro agreeing that they feel safe whenever they provide moto-hailing services to users.

All of these are a testament to DiDi’s commitment to providing a safe environment for all using the platform. Several of the platform’s key safety features are listed in Box 6 below.

The safety benefits that these functions have provided for both users and drivers are evidenced by the relatively low accident and incident rates among DiDi Moto/99Moto rides. **Across the second half of 2023, it was reported that over 99.9% of trips were completed without any incident, and even when such situations were reported, fewer than 20% of these incidents comprised traffic accidents.**<sup>24</sup> This underscores the platform’s reliability in providing a safe mode of travel for drivers and users alike.

### Box 5: DiDi's safety features leverage cutting-edge technology to keep drivers and users safe

DiDi has been committed to placing safety at the forefront of its concerns through continuous improvements to its features over the past 10 years. The platform has consistently leveraged technology to ensure that both users and drivers have access to suitable offerings that give them peace of mind while making trips, with some examples listed below.<sup>25</sup>

#### Before the trip

- **Driver screening:** All drivers are required to go through background screening and provide the required documents according to local regulations before being allowed to offer trips.
- **Passenger verification:** Users must also verify their identity with the relevant supporting documents, and those who have previously been blocked due to incidents are prevented from re-registering. Furthermore, artificial intelligence (AI) models are being used to assess the risk of new users so that additional verifications before trips can be taken in necessary cases.
- **More extensive pre-trip information:** Both drivers and users can see information about the other party before the trip is made.
- **Risk zone alert:** The platform identifies risk zones based on platform incident rates and public safety information. If a trip is expected to enter a risk zone, drivers can reject the request without any penalties.
- **Anonymous calling:** The platform allows drivers and users to contact each other using anonymous telephone numbers, which avoids either party having to divulge their personal details.
- **99Women:** This feature allows female drivers to accept trip requests only from female users.

#### During the trip

- **Helmet requirements:** Drivers are required to wear a helmet and provide an authorized helmet to users.
- **In-trip monitoring:** All trips are monitored for suspicious activity, such as unexpected stops or long durations.
- **Trusted contacts:** Users can share their trip details with up to five pre-saved trusted contacts via SMS, WhatsApp, or within the app.
- **Emergency button:** Users and drivers can instantly connect with emergency services and a specialized safety team by activating the emergency button. For instance, in Rio de Janeiro, this button automatically sends trip and location data to the police in real-time.
- **Audio recording:** Drivers and users can each enable audio recording via their phone, which can be used as evidence in the event of a safety incident.
- **Insurance for every trip:** In addition to the driver's own insurance, DiDi/99 provides insurance against accidents during trips.

#### After the trip

- **24/7 Customer Support:** Drivers and users have access to 24/7 customer service in case of any incidents.
- **Driver and user ratings after the trip:** After every trip, drivers and users can provide ratings for each other and leave comments that will be seen by customer support.
- **Ability to block a driver/user:** Drivers and users can block each other where needed, which will prevent them from being matched with that party again in the future.
- **Address of user hidden once trip completed:** Once a trip is completed, the user's address will no longer be visible within the driver's app.

# 5. Conclusion

In conclusion, the rise of moto-hailing services has brought about significant economic and social benefits for users, drivers, and broader society. From providing affordable and convenient transportation options for users to providing drivers with income-generating opportunities and reducing congestion, moto-hailing is just beginning to reshape urban mobility in profound ways and offers a huge opportunity for potential transformation.

For users, moto-hailing services have made commuting more accessible and affordable, particularly for lower-income groups and individuals living in areas lacking public transit. This has enabled more equitable access to social and economic opportunities and overall cost savings. Moreover, moto-hailing services enhance existing public transit networks by improving first and last-mile connectivity for individuals who lack easy access to public transportation. They also offer a convenient mobility option during hours when public transit services are not operational.

Moto-hailing provides drivers with a flexible income-earning opportunity, enabling them to support their families alongside other personal and professional responsibilities. There is also adequate support in place for drivers to unlock other benefits, such as improved financial independence. This could further benefit specific groups, such as low-income individuals or females.

Lastly, society more generally also benefits from moto-hailing due to reduced congestion and shorter commute times. This is particularly true in the four focus cities, and more broadly in Latin America, where traffic congestion poses a significant challenge. Furthermore, DiDi has comprehensive safeguards in place to ensure that users, drivers, and other road users are kept safe.

Moving forward, it is crucial to encourage close collaboration between policymakers and other stakeholders, such as moto-hailing platforms, to adopt a holistic approach toward regulation. For instance, initiatives that may be helpful include prioritizing measures that ensure safety, incentivizing



the adoption of electric vehicles, implementing driver training programs (e.g., how to better support female drivers), and fostering partnerships between moto-hailing platforms and public transit agencies to enhance multimodal integration. Moreover, there is a need for continued dialogue and collaboration between government authorities, industry stakeholders, and community representatives to address emerging concerns, challenges, and opportunities in the moto-hailing landscape and wider transport ecosystem. By striking a balance between innovation and regulation, policymakers can harness the transformative potential of moto-hailing to create more inclusive, efficient, and sustainable urban transportation systems.

In conclusion, moto-hailing represents a dynamic and evolving aspect of the modern transportation ecosystem, offering promising opportunities for economic growth and social progress. With thoughtful policy interventions and collaborative efforts, cities can leverage the benefits of moto-hailing to build a more resilient, equitable, and livable transport ecosystem for all.

# Appendix: Methodology and data sources

## A1. Methodological note for surveys

This report used online user, driver, and general population surveys across the four selected focus cities: Bogota, Rio de Janeiro, Mexico City, and São Paulo. Surveys were conducted in the respective local languages and disseminated across February-March 2024.

**User and driver surveys were conducted in Bogota and Rio de Janeiro, where DiDi currently has active moto-hailing operations.** For the user survey, the filtering criteria used were that respondents were required to be active moto-hailing users registered with DiDi/99Moto with at least one trip taken in the past 12 weeks. For the driver survey, the filtering criteria used were that respondents were required to be active moto-hailing drivers registered with DiDi/99Moto who had made at least one trip in the past four weeks.

**General population surveys were conducted in Mexico City and São Paulo, where DiDi does not currently have moto-hailing operations.** No filtering criteria were set for these surveys as they were intended to gauge the average respondent's perceptions toward moto-hailing services.

The breakdown of survey respondents by city and demographic can be found in the table below.

Table A1: Survey respondent demographics

City/ Demographic	Users	Drivers	General population
Bogota	280	400	-
Rio de Janeiro	280	400	-
Mexico City	-	-	400
São Paulo	-	-	400

## A2. Methodological note for estimating the economic and social impacts of moto-hailing

### Estimating the cost of mobility

We estimated the relative costs of various mobility options on an annual basis by comparing the price of moto-hailing to i) owning a personal car, ii) owning a personal motorbike, and iii) taking a taxi.

The cost of moto-hailing was estimated by multiplying the number of moto-hailing trips made yearly by each user by the average price paid for each trip, with both data inputs taken from our surveys. In cities where moto-hailing is not currently available, the number of trips made was estimated using the average number of trips made in Bogota and Rio de Janeiro. The price paid per moto-hailing trip in cities that do not currently have moto-hailing operations was estimated by comparing the average taxi fare in the four cities against each other and

using the average price paid for a moto-hailing trip in the cities with operations as a proxy. This assumes that moto-hailing fares are a comparable fraction of taxi fares across the four cities.

The cost of personal car ownership was estimated after considering the asset cost of the vehicle, as well as upkeep and commute costs. For our calculations, we used the most popular mid-tier car model in each city and assumed that a loan would be taken out to pay for the vehicle. Upkeep and commute costs included the price of annual road taxes, insurance, maintenance, fuel, and parking fees.

The cost of personal motorbike ownership was similarly estimated after considering the asset cost of the vehicle, as well as upkeep and commute costs. For our calculations, we used the most popular mid-tier motorbike model in each city and assumed that a loan would be taken out to pay for the vehicle. Upkeep and commute costs included the price of annual road taxes, insurance, maintenance, fuel, and parking fees.

The cost of taking a taxi was estimated by multiplying the number of taxi trips made yearly by each user (taken from our surveys) by the average price paid for each trip. The latter was estimated based on taxi fare calculators for each city that are publicly available.

### **Estimating the time-related costs of commuting**

This analysis comprised two parts: estimating the current costs of commuting and the potential cost reductions that result from moto-hailing.

The current opportunity cost of travel for each city was obtained by multiplying the total time spent traveling each day (taken from our surveys) by an estimate of the average wage measure in the city (this serves as a proxy for the opportunity cost of time). The average wage measure in each city was estimated by dividing city-level GDP per capita by national GDP per capita and multiplying this by the national average wage. In cities with current moto-hailing operations (Bogota and Rio de Janeiro), this estimate represents the total opportunity cost after accounting for cost savings that moto-hailing helps to unlock.

The reduction in commuting costs currently seen in cities with existing moto-hailing operations (Bogota and Rio de Janeiro) was estimated by multiplying the time saved by each user from switching to moto-hailing (taken from our surveys) by the total number of individuals commuting daily and the city's average wage measure.

In cities where moto-hailing services were not available (Mexico City and São Paulo), the potential reduction in commuting costs was estimated using Bogota and Rio de Janeiro as proxies, based on the average time that could potentially be saved per user from switching to moto-hailing.

# Endnotes

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