Executive Summary

Urban mobility is vital nowadays since it provides access to services for passengers and goods and supports economic growth. The concept of urban mobility is increasingly being adopted to describe the variety of systems that allow people to move around the world. This shift from "transportation" to "mobility" represents a big change on how transportation systems are designed and managed. While transportation is mainly a system concept, mobility is an user-focus concept.

Urbanization is in a rapid pace, placing a great pressure on cities resources and infrastructure. One of the biggest challenges faced by cities around the world is the improvement and expansion of urban mobility systems. In many cities, existing mobility systems are already inadequate while urbanization and population are still increasing. By 2050, two-thirds of global population will live in cities, up from about 55 percent today, according to the United Nations. The existing urban infrastructure cannot support such an increase in vehicles on the road, for example.

Cities have traditionally solved such challenges by adding new capacity to attend demand. However, a capacity-building approach alone is neither efficient nor sustainable. Besides that, already today, many countries face a strong need for reaching policy goals regarding reduction on emissions (CO_2, NOx, noise etc) and management of public space (congestion and pollution), balancing mobility needs with quality of life and sustainability.

Since the beginning of the twenty-first century, we have been witnessing a rapid technological revolution, with communication-based technologies enabling radically different approaches to mobility for both individuals and goods. In addition, we have witnessed the emergence of a less car-focused generation, constantly connected, impatient and with an environmental conscience that is transforming the way people move – the Millenials and not or Generation Z (first generations that didn't know the world before the digital revolution).

To manage this increasing demand user habits shift in conjunction with the lack of investments in transportation from governments, a wide range of complementary mobility solutions and services emerged adopting innovative user-centric, smart, multimodal and intermodal approaches and technologies called today - The New Mobility Services (NMS).

NMS have been characterized as more reliable, predictable, efficient, convenient and accessible way of moving from a place to other, as well as offering an easier way for payment. **Car sharing, ride hailing, ride sharing, bike sharing are the most noteworthy new mobility services currently being developed.**

All over Brazil, investments in urban transportation are unsatisfactory and have not followed the rapid increase of urbanization rate: 86% of the country's population currently lives in urban areas. This lack of investment has mostly affected public and non-motorized transportation infrastructure, which are both insufficient to meet existing demand and "inducing" the final user to buy its own vehicle, what causes traffic jam and intensify environmental pollution.

Due mainly to the new generation, congestion and low quality of public or non-public services (transportation sector), the essence of urban mobility in Brazil, Latin America's largest economy, is changing from the "owned vehicles" culture to the "shared vehicles" culture. Reason why the new mobility services are growing impressively and many companies in the country are investing to gain advantage in this rapidly evolving market.

However, providing end-to-end transportation by linking different transportation modes and making better use of the existing transportation options in a given area, is just a partial solution, as due to social aspects a large number of people do not have access to these disruptive services. **New mobility services will first bring disruption in urban transportation than in suburban areas.**

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