

# The Lack of Competition in the Non-scheduled Public Transport Sector in Italy

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**Abstract**—This paper explores the impact of regulatory constraints on the non-scheduled public transport sector in Italy, focusing on taxi and chauffeur-driven rental services. Despite extensive market liberalization in other industries, this sector remains subject to strict numerical limitations imposed by municipalities under Law No. 21 of 1992. The resulting scarcity of licenses has fostered a secondary market, inflated costs and restricting market access for new entrants. The article examines the economic consequences of this licensing system, highlighting how it distorts competition, raises consumer prices, and reduces service availability, particularly in major urban centres. Attempts at legislative reform have consistently met resistance from industry stakeholders, preventing meaningful liberalization. Moreover, the practice of acquiring licenses in small municipalities, underscores the inefficiencies and complexities within the current regulatory framework. Through an analysis of legal regulation, market data, and policy implications, this paper argues that comprehensive reform is necessary to enhance competition, improve service quality, and ensure fair access to the market. The findings suggest that removing or significantly increasing the cap on taxi and NCC licenses could lead to greater market efficiency, lower consumer costs, and a more dynamic transport sector.

**Keywords**—“competition”, “drivers”, “Italy”, “non-scheduled public transport”, “taxi licenses”.

## I. INTRODUCTION

Maintaining and creating fair competition is a priority in modern society in the whole the world. The liberalization of entrepreneurial competition in Italy has significantly evolved over the years, particularly since the enactment of Legislative Decree 114/98 [19] (the so-called "Bersani Reform"), which eliminated numerical restrictions on fixed-site retail trade. This reform enabled a more dynamic and competitive environment for

businesses, facilitating market entry and expanding consumer choices. However, a notable exception to this liberalization remains within the non-scheduled public transport sector, which comprises two key categories: taxis and chauffeur-driven car rentals (NCC - noleggio con conducente).

Unlike other sectors, non-scheduled public transport remains subject to rigid numerical limitations, governed by Article 5 of Law No. 21 of 1992 [20]. This provision authorizes municipalities to determine the number and type of taxi and NCC licenses issued within their jurisdiction. As municipalities exhaust their allocated quotas, aspiring entrepreneurs are forced to acquire licenses through private transactions rather than public tendering processes. This phenomenon has led to a distortion of market dynamics, restricting free competition and limiting service availability, particularly in major urban centres where demand far exceeds supply.

As an alternative to acquiring licenses in major metropolitan areas, some entrepreneurs have sought licenses in small municipalities where quotas remain unfilled. However, the bureaucratic complexity of cross-provincial registration and the requirement to maintain a physical garage within the issuing municipality add further constraints. Despite these efforts, the fundamental issue remains unresolved: the artificial scarcity of taxi and NCC licenses continues to stifle competition, inhibit service improvements, and burden consumers with excessive costs.

The authors critically examine the impact of regulatory restrictions on non-scheduled public transport in Italy, exploring the economic and social consequences of the existing licensing system. By analyzing legal regulatory tendencies, market distortions, and policy implications, this paper aims to contribute to the ongoing debate on potential reforms and the broader necessity for

Online ISSN 2256-070X

<https://doi.org/10.17770/etr2025vol1.8665>

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liberalization in the sector. The following research methods are used in the article: analysis of legal acts and other sources, statistical information, comparative, and logical methods.

There is still a lack of scientific articles on this topic. The following authors have written on the issues of taxi competitiveness in Italy: Vincenzo Visco Comandini Stefano Gori Flaminia Violati "Le licenze dei taxi: abolizione, regolazione o libero scambio di diritti?" (2004) [2]; Chiara Bentivogli, "Taxi regulation and the Bersani reform: a survey of major Italian cities" (2009) [3] – she analyzes the Italian taxi market and its recent changes after the new Bersani law; Laura Chierroni "Deregulation as a Means of Social Policy" (2017) [4] – she analyzes the disputed issue of the effect of liberalization on social welfare in Italy involving the uncompetitive taxi business; Luca Germano, Giuseppe Montelbano, Andrea Pritoni, "Still waiting for the "liberal revolution"? The Italian pro-competition law and the cases of taxi licenses and beach concessions" (2023) [5].

## II. MATERIALS AND METHODS

Although over the years, particularly since the distant 1998, with Legislative Decree 114/98 (the so-called "Bersani Reform") for fixed-site trade, the liberalization of entrepreneurial competition in Italy has seen a notable increase, making it possible, for example, to open retail outlets (commonly called shops) without any numerical limit. But there still exists a sector where very strong restrictions on free access remain. This is the non-scheduled public transport sector that is embodied in the two categories that compose it, namely taxis and car rentals with drivers.

Taxi drivers and car rental companies with drivers, while still having the obligation to return at the end of the service (except in special cases) to the garage located in the municipality that issued the authorization, can provide the service to any destination. The rule of return to garage creates not only an economic and logistic burden, but also increases pollution. Taxi drivers have the advantage of having parking areas dedicated to them, which cannot be accessed by car rental companies with drivers, who instead must stop, while waiting for the customer's call, at their own headquarters, their garage.

The peculiarity, the uniqueness in a certain sense, of this category (taxi and car rental with drivers), lies in the provisions of art. 5 of Law no. 21 of 1992 (and subsequent amendments and additions) [20]. This art. 5 establishes, among other things, that the municipalities, in preparing the regulations on the operation of non-scheduled public transport services, establish:

*a) the number and type of vehicles and vessels to be used for each individual service.*

The word "number" correctly suggests that there is a limit to the number of taxi and chauffeur-driven rental licenses that can be issued. The statistics of 2024 show that there are 28,604 taxi and 127,508 NCC in Italy [6]. Comparing with other cities of Europe (London, Paris), the

number of taxis in Milan and Rome is less than half [7]. For example, following the statistics on 2024 in Rome (Lazio region) there were 8171 licenses for taxis and 7998 NCC licenses [8], and comparing to the tourists flow in Rome, this is a very small number. Therefore, the availability of taxis in this city has increased significantly, and the prices for services are high. Similar problems and needs to grow the number of taxi and NCC licenses were expressed in the document "Parere a Roma Capitale sull'incremento del contingente taxi e sull'adeguamento del sistema tariffario, reso dall'Autorità di regolazione dei trasporti ai sensi dell'art. 37, comma 2, lett. m), del decreto-legge 6 dicembre 2011, n. 201, convertito, con modificazioni, dalla legge 22 dicembre 2011, n. 214, e successive modificazioni" [21] by the Transport Regulatory Authority in 2024. There are little towns, for example the Cremona region in Italy, where any taxi licenses do not exist in their territory but only NCC [9]. It could cause problems for disabled people, or in the need for extra cases (because NCC requires advance booking).

Having established a "number" has the consequence that a parallel "market" of licenses has been created over the years, causing their value to increase significantly. In fact, once this "number", calculated by the municipalities (in reality, due to subsequent regulations, compliance is carried out annually by larger local authorities such as the provinces and regions, for example, Lombardy Region, circular no. 13.777 of 12/07/1999 and subsequent Resolution of the Provincial Council of Cremona no. 12/09/2000 with act no. 507 (Regione Lombardia, circolare n. 13.777 del 12/07/1999 and subsequent Deliberazione della Giunta della Provincia di Cremona n. 12/09/2000 con atto n. 507) has been exhausted in an "empirical" way on the basis of resident citizens and services present in the territory, other people interested in carrying out this activity no longer have the possibility of obtaining the desired license to be able to practice the profession. In fact, once the "number" has been exhausted, the municipalities will no longer publish public notices for the assignment of new licenses. Only if a municipality had a significant increase in the resident population or the introduction of new services for the community, such as, for example, the construction of a new hospital or a new railway station, could the "number" be revised upwards. It is evident that these situations are infrequent. Noteworthy is that in the autumn of 2024, new licenses were introduced in the Rome municipality in a very strict way (only 1000 licenses, and strict requirements: for example first 200 licenses for vehicles equipped for the transport of disabled persons) [22] - it could be connected also with the Jubilee of Rome and the larger number of tourists.

In order to carry out this activity, interested parties are therefore obliged to turn to the market, purchasing the relevant authorization title from those who already have a license. In this way, the price of individual licenses has grown enormously (for example, the average price for a taxi license in Italy is 100-120 thousand euros. In Rome, it starts from 125 thousand euros; in Milan – from 150 thousand euros, Turin – from 100 thousand euros [1]). Those who sell it consider it a "severance pay", a sort of

final price to be collected usually at the end of their working life, close to retirement, while for those who buy, it is an investment to be made profitable during all the years in which they will carry out the activity of taxi driver or rental company with driver.

The licenses can be inherited also. In fact, Article 9, paragraph 2 of Law no. 21 of 15 January 1992 establishes that in the event of the owner's death, the license or authorization can be transferred to one of the heirs belonging to the owner's family unit, if in possession of the prescribed requirements, or they can be transferred, within a maximum period of two years, to others designated by the heirs belonging to the owner's family unit, provided they are registered in the role held by the provincial chambers of commerce, industry, crafts, and agriculture and in possession of the prescribed requirements. From the literal interpretation of the national law, it would seem that the heir can take over the license from the predecessor (the deceased) only if, at the time of death, he already possesses the required professional requirements, otherwise leaving him the right to sell it to others within two years. But the Article 5 of the same law also attributes to the municipalities, through the preparation of specific regulations, the establishment of the requirements and conditions for issuing the license for the operation of the taxi service and the authorization for the operation of the rental service with driver. Consequently, there has been a flourishing of provisions at the local level that have in a certain sense, made up for the legislative gap by introducing, for example, in one of the municipalities of province of Cremona, the possibility of transferring the license to one of the heirs on the condition that he requests it within 3 months of death and within 1 year of the request, demonstrating that he meets the requirements (returned to the municipality and registration in the provincial register). In the authors' opinion, the inheritance order should be abolished, or at least revised, because it also limits competition by preventing other participants from entering. because these are personal services. It also reduces competition.

Finally, it should be emphasized that the one who pays the price for all bureaucratic rulings is obviously the final consumer, that is, the ordinary citizen or tourist. All of these reasons listed above show that taxis are expensive. For example, in Rome, a standard ride amount of a 5 km route with a 5-minute stop or wait by a user without luggage costs 13.10 euro plus a progressive rate, which also depends on speed and so on [17]. In Bologna municipality declared this information about prices: if a person leaves from a parking lot, the fixed starting fee is 3.90 euros; if calling radiotaxi or using an app, the taximeter is activated upon call with the fixed starting fee of 3.90 euros and increases based on the distance: the amount cannot exceed 6.80 euros (3.90 euros + 1.45 euros x 2 km) even if the distance is greater than 2 km; to this must be added the radiotaxi/app supplement of 1.35 euros, for a maximum total of 8.15 euros; once the journey has begun, the passenger will pay 1.45 euros for each kilometre travelled in an urban area, but when the taxi

travels at a speed of less than 20 km/h the taximeter will apply the rate of 29.30 euros per hour, equal to 49 euro cents per minute (multiple-based rate: journey and time) and so on [18]. Availability of taxi services in Rome has issues also. For example, the Italian Authority on Competition and Market, with the collaboration of the Special Antitrust Unit of the Guardia di Finanza in their research emphasized that the trend of requests for taxi services is growing more than proportionally compared to the requests that the various cooperatives and apps are able to satisfy: over the period January-July 2023, the total requests increased from approximately 985 thousand to approximately 3 million, while the unfulfilled requests increased from approximately 155 thousand to approximately 1.3 million. The percentage of unfulfilled requests, which between January and February was around 14-15%, rose to approximately 45% in June and July [23]. The introduction of a procedure for additional or temporary taxi licenses could improve the situation.

### III. RESULTS AND DISCUSSION

Over the years, governments have tried several times to "liberalize" taxi and chauffeur-driven rental licenses with legislative proposals, but they have always clashed with enormous taxi protests from the category, which has staged real civil "riots" or strikes with traffic blocked in the centres of large cities such as Rome, Milan, or Naples [10] [12] [13]. This, together with the inevitable loss of electoral votes in the entire category, has meant that such legislative proposals have remained just proposals and that Art. 5 of Law 15 January 1992, n. 21, is still in force in Italy. For example, the survey "Italians and Taxis 2025" [16] was made intervene with some taxi companies and presented in the press room of the Chamber of Deputies (the event was promoted by Uritaxi with the support of the AppTaxi and Taxi Move apps) to show a positive level of satisfaction among passengers about taxi services: one of the most significant aspects concerns waiting times - 88.5% of Italian users manage to get a taxi within six minutes of calling, a figure that exceeds the European average of 85.1%; 9 out of 10 Italians are satisfied with waiting times under 6 minutes. It seems that the situation is good in the Italian non-scheduled transport services. However, it is worth noting that the survey does not include tourists and it was commissioned by one of the interested parties, for which it is extremely important to maintain a stable market and monopoly in this business. It seems that taxi lobbying organizations have great power to avoid liberalization of this business using different ways and staying in a non-competitive situation. Another issue could be tax-avoidance. The Economic Research Institute shows that the average pay in 2025 for a taxi driver is €24,388 a year and €12 an hour in Italy [15]. The average salary range for a taxi driver is between €18,584 and €28,339, and it is less than the average of Italian salary in total (around 32,450 euros). It seems that their income is low, but some taxi drivers sate that a profit can reach 500-600 euros per day [11].

As an alternative to purchasing taxi and chauffeur-driven rental licenses on the free market, which are now

exhausted in the "numbers" in the main Italian urban centres, some private entrepreneurs, unable to sustain the expense of purchasing such licenses, have begun to turn to small Italian municipalities (another trick), even in possession of their "number" of licenses to be assigned through a tender, very often still available since in small centres there is no need for these transport licenses. Partly because there are no tourist flows comparable to large cities and partly because the use of private/personal cars is very widespread in Italian reality. Therefore, it is not uncommon to see entrepreneurs' residents in Milan looking for these transport licenses in small municipalities even more than 100 km away from their actual interest in carrying out the activity, subjecting themselves to the obligation to have a garage where the car must stop at the end of the day in the territory of the municipality that issued the license. The licenses are provincial, and in order to obtain them, entrepreneurs must be registered in a special register kept by the competent province: Art. 25, comma 2-bis, Regional Law n. 6/2012 [24].

According to Italian law, it is not sufficient, i.e., to be registered in the Register of the province of Milan to request the release through a tender of a license from a municipality located in another provincial area. An excess of bureaucracy, certainly, but the spirit of the law is that these taxi drivers and rental companies with drivers must perform services for the municipalities, even the small ones, that have issued the license. However, not even this limitation is sufficient to prevent people who wish to undertake this profession from requesting the publication of a tender for the assignment of a taxi and rental company with a driver's license in small municipalities. These entrepreneurs also take exams to register in the register of the province where the small municipality is located (we would like to mention that in Italy the administrative division starts from the region, followed by the provinces contained in the region and then by the individual municipalities contained in the various provinces). Once they have obtained registration in the provincial register of the small municipality that still has these licenses available and have rented a garage where they can park the car, they can apply for publication of the tender.

This whole distorted situation is a consequence of the lack of effective competition in this sector in Italian reality. The truth is that none of these people, except for the few entrepreneurs who actually live in small towns, are really interested in carrying out their activities in small suburban towns. They only want the license, the authorization title enabling them to register their car for rental with a driver. A car that will then perform 90% of service in large city centres where licenses have been exhausted for years and where no government has so far been able, not only to completely liberalize, but not even to expand the numerical quota of such licenses. In fact, the Legislative Decree of 14 December 2018, n. 135, art. 10-bis, paragraph 6, had established that until the national public computer archive of rental companies with drivers was fully operational, the issuing of new authorizations was not permitted, thus further hindering the liberalization of the sector.

But it should be emphasized that only a short time ago, the very recent Judgment of the Italian Constitutional Court of 19 July 2024, n. 137 [25], established the unconstitutionality of the aforementioned art. 10-bis paragraph 6, thus reopening the possibility of issuing new rental licenses. The Court noted that limited distortion of competition occurred as a result of the contested legislation, not only was the well-being of the consumer unduly compromised, but something broader was as well, which concerns the effectiveness of the enjoyment of certain constitutional rights, as well as the interest in the economic development of the country. It affected the freedom of establishment in a very negative way.

There are many European countries where reforms on non-scheduled transport were introduced before. An example of positive reforms in taxi business liberalization could be the United Kingdom (UK). In 2015, the UK's taxi industry underwent significant changes with the enactment of the Deregulation Act 2015 [26]. This legislation aimed to reduce regulatory burdens across various sectors, including taxi and private hire services. Notably, it introduced measures affecting the duration and renewal of taxi and private hire vehicle (PHV) driver licenses. The Act standardized the duration of taxi and private hire services driver licenses to three years and PHV operator licenses to five years, unless a shorter period is specified. This change aimed to reduce administrative burdens on drivers and operators. This provision aimed to enhance service flexibility and availability for consumers. Traditional taxis (especially London's Black Cabs) faced significant competition from Uber and other private platforms. Taxi fares fell, and digital platforms transformed the way taxis are ordered. The development did not end there, and in 2020 the UK Government issued, for the first time, Statutory Taxi and Private Hire Vehicle Standards [27] to safeguard the most vulnerable in society. In Italy, services for individuals with disabilities are primarily managed at the local level – there are not common regulations.

In 2018, Finland implemented significant reforms to its taxi industry by establishing the Act on Transport Services [28], aiming to increase competition and improve service availability. The key changes included removing restrictions on the number of taxi licenses and deregulating fare pricing, allowing market forces to determine supply, demand, and prices.

In 2000, the Netherlands implemented reforms to liberalize its taxi industry, aiming to enhance competition, improve service quality, and reduce fares. The key changes included removing restrictions on the number of taxi licenses and allowing market forces to determine pricing structures. The latest decision of the Netherlands is to restrict all newly registered taxi and rental cars in the big cities to zero-emission vehicles after 2025. This comes about after the policy decision to allow municipalities to introduce zero-emission zones in cities; however, these zero-emission zones can now also include taxis [14].

Those examples of good practices only further highlight the stagnation of Italy's non-scheduled transport services and the requirements for demands.

#### IV. CONCLUSIONS

The non-scheduled transport industry in Italy remains heavily restricted by a system of limited licenses, strong lobbying organizations, loopholes in the laws, and outdated regulations that hinder market efficiency and consumer choice. The scarcity of licenses has created an artificial barrier to entry, leading to inflated secondary market prices for consumers and a lack of availability of taxis and NNC services.

Solutions could be related to the implementation of anti-monopoly regulations to ensure fair competition, which would allow access to everyone who meets the requirements and avoid abuse of one's rights. Allowing for temporary or seasonal licenses to address peak demand periods could help to avoid tourists' dissatisfaction. Special regulations for vulnerable consumers are necessary in the state level.

The aforementioned Constitutional Court ruling is the legal key to liberalizing the irregular transport sector. If not a total liberalization, this Ruling should lead to an inevitable increase in the number of licenses that can be issued. Now it is up to the Italian executive power to find creative solutions that allow the different interests involved to be balanced: those of the entrepreneurs already in possession of taxi and rental licenses with drivers, for which they have paid large sums of money, even contracting debts with the banks; those of the new entrepreneurs eager to undertake this profession; and last but not least, the legitimate interests of the citizens/tourists who use this service. This ruling aligns with broader European trends observed in countries like the UK, Finland, and the Netherlands, where liberalization policies have successfully improved service availability, pricing, and working conditions while maintaining regulatory oversight. Experiences of these countries demonstrate good practice that a carefully planned liberalization process can lead to a more efficient, equitable, and innovative taxi industry.

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