

**Minutes of the STR Working Group
25 September 2025, Online**

Chair: Ramon Estalella (CEHAT, Spain)

Key action points

1. HOTREC to monitor members the implementation of the EU STR Regulation and VAT in the Digital Age (ViDA) package
2. HOTREC members to continue exchanging experiences and best practices
3. HOTREC to leverage the STR data from Toposophy in its engagement strategy with EU policymakers
4. respond to the European Commission's consultation on the European Affordable Housing Plan (EAHP) which, among other things, looks at addressing STRs' adverse effects on the housing crisis.
5. HOTREC to update the internal table on national STR legislation

The list of participants can be found [here](#).

All presentations and additional information can be found on the meeting page [here](#).

Participants gave consent for the meeting to be recorded.

1. Antitrust statement and approval of the agenda

HOTREC members noted the antitrust statement and approved the draft agenda.

2. Welcome by the Chair

Ramon Estalella (CEHAT), Chair, welcomed the participants and opened the discussion.

3. Presentation by Toposophy | STR regulatory updates, market developments and key takeaway

Barry Rogers, Toposophy provided an overview of their latest study challenging Airbnb's June 2025 report which blames overtourism in Europe mainly on hotels, while downplaying the impact of short-term rentals. In the STR regulatory update, he shared examples of destinations implementing controls on STRs, including New Orleans and Beverly Hills in North America, and several European countries such as Spain, Ireland, the Netherlands, Belgium, Greece and Cyprus (see [slides](#) for further information). As a conclusion, he highlighted the importance of forcing platforms into full accountability, from data-sharing to delisting non-compliant listings, to promote transparency and co-existence with traditional accommodations.

Ramon Estalella, CEHAT, acknowledged the proliferation of STRs across Europe, stressing the need for more barriers/requirements on STRs to reduce the number of listings.

Maria Schreiner, WKO, highlighted a recent meeting held recently with representatives from Airbnb. During the discussion, Airbnb claimed, based on internal data, that their platform has no significant impact on the housing market.

Several participants in the meeting expressed concerns about this issue, underscoring the growing importance of short-term rental regulation.

4. Discussion: Recent developments with platforms and on STR at national level

National Updates

STR Regulation Implementation

The regulation on STRs starts applying in May 2026, with a review by the Commission in 2031. Some participants offered an update of their national situation in terms of STR regulation:

- **Mattias Svanold, VISITA**, shared that in its pursuit of a simplification agenda, the Swedish government is unlikely to prioritize the implementation of the STR Regulation. This may change depending on how many EU countries will apply the new rules.
- **Tobias Warnecke, IHA** - In Germany, Airbnb is politically supportive of STR regulation. However, the implementation of the new legislation is likely to face delays due to challenges in ensuring coordination across all national and federal states. Mr. Warnecke stated that in response to Airbnb's efforts to strengthen its position by joining national associations where IHA is also a member, IHA has threatened to withdraw from those associations if Airbnb is admitted. He encouraged other HOTREC members to consider adopting a similar stance.
- **Maria Schreiner, WKO** - Austria finds itself in a similar situation to Germany. While legislation has been proposed, implementation remains uncertain as all nine federal states are required to adopt the measures.
- **Kulli Kraner, EHRA** - Estonia has placed a strong focus on STRs, with the relevant ministry working on a report with a national market analysis on the sector. This report, expected in early October, will serve as the foundation for future regulatory proposals.
- **Franck Trouet, GHR** - France is moving forward with comprehensive STR regulation under the *Le Meur Law*, which entered into force in November 2024. This legislation mandates data sharing by platforms and grants municipalities increased authority, including: (i) reducing the maximum number of rental days, (ii) setting quotas in certain districts, and (iii) prohibiting STRs in specific areas to preserve housing availability for locals. Preliminary impacts are already visible, with a reduction in available STR accommodations reported in multiple cities.

5. Other legislative and policy updates | VAT in the Digital Age

Enrico Giroto shared insights on the VAT in the Digital Age (ViDA) package, highlighting its phased implementation from 2027 to 2035. A key aspect of the reform is the introduction of a special VAT scheme for STR platforms that offer accommodation for a maximum of 30 days. This measure aims to ensure that STR platforms are treated more consistently with traditional hotel services, moving towards a more level playing field in the accommodation sector. Mr Giroto

invited HOTREC members to monitor the national implementation of the new rules and share any relevant update with HOTREC Secretariat.

6. EU Policy Updates and Public Affairs

Enrico Girotto highlighted key updates on STRs, including:

- a project by UN Tourism evaluating the current regulatory framework on STR platforms in specific countries (Bosnia and Herzegovina, Croatia, France, Greece, Italy, Montenegro, Serbia);
- a proposal for an STR Directive by the EU political group of S&D;
- a draft report on the EU housing crisis by the European Parliament's HOUS Committee. HOTREC will submit recommendations for amendments.

See [slides](#) for further information.

A discussion followed on HOTREC's position, highlighting the need for (i) uniform implementation of the EU STR Regulation, (ii) additional data on the impact of STRs on the economy and society, and (iii) a level playing field between STRs and hotels.

In terms of next steps, HOTREC will:

- respond to the European Commission's consultation on the European Affordable Housing Plan (EAHP) which, among other things, looks at addressing STRs' adverse effects on the housing crisis;
- reach out to the European Commission's Housing Task Force (DG ENER);
- share Toposophy's data with HOTREC members;
- share the latest survey on STR legislation and ask members to check the current information and add updates.

Ramon Estalella (CEHAT) emphasized that solutions should be destination-specific rather than country-wide and welcomed the upcoming umbrella legislation and made final remarks, thanking all participants for their attendance and involvement.