

NEWSLETTER - MAY 2022

IOTA NEWS

12.04.2022

29th Forum of IOTA Principal Contact Persons “IOTA in 2022 – Back to the Future”



The 29th Forum of Principal Contact Persons was successfully held by IOTA between 6th-7th April 2022 in Budapest as well as virtually via MS Teams. This Forum was the first-ever hybrid event in the history of IOTA and took the Organization’s activities to the next level. This year’s PCP Forum “IOTA in 2022 – Back to the Future” was opened by Alix Perrignon de Troyes, the Executive Secretariat of IOTA and focused on the forward look of the Organization. The two-day hybrid event welcomed 25 participants gathering in person at the venue and 38 attendees joining digitally to the entirely new experience after two years of virtual operation.

On the first day, members of the IOTA Secretariat gave presentations during the plenary sessions on the following range of topics:

- Draft Strategy 2023-2027, Alix Perrignon de Troyes, Roman Bichevoy
- Update on Technical Activities Working Group, Eugenijus Soldatkovas
- Update on Financial Framework Working Group, László Muzslay
- Update on Communication Strategy Working Group, Erika Szabó

During the second day of the Forum meeting, the plenary session’s presentations ran under these themes:

- Technical Enquiries, by Eugenijus Soldatkovas
- Peer-to-Peer Technical Assistance, by Roman Bichevoy, Johannes Stipsits, Oksana Stepanenko
- Update on Development of IOTA Web Portal, by László Muzslay
- Draft IOTA Code of Conduct, by Alix Perrignon de Troyes
- Update on the Preparation for the 26th General Assembly of IOTA, by Eugenijus Soldatkovas
- Induction Session for Newly Appointed PCPs, by Roman Bichevoy, Eugenijus Soldatkovas, Massimo Morarelli

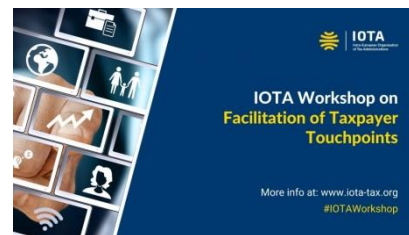
In addition to the plenary sessions, each day of the PCP Forum included three parallel group discussion sessions at which both onsite and online participants could benefit from in-depth discussions on the specific aspects of the IOTA work. During the first day of the event, PCPs debated on the themes of *IOTA Strategy 2023-2027*, *Evolution of Technical Activities* and *Adjustment of the Contribution System*, while the topics of the second day’s group sessions revolved around *Technical Enquiries*, *Peer-to-Peer Technical Assistance* and *Code of Conduct*.

After a Q&A session between participants and the members of the IOTA Secretariat, the hybrid event was closed by an *Induction Session for Newly Appointed PCPs*, as well as outlining the main conclusions and next steps to be taken based on the work presented and discussed during the two days event.

25.04.2022

IOTA Workshop on Facilitation of Taxpayer Touchpoints

The IOTA Workshop on Facilitation of Taxpayer Touchpoints shared a unique perspective on member experiences, best practices of actions and strategies to improve and integrate unnecessary taxpayer touchpoints. The digital workshop was organized between 20th and 21st April 2022 and welcomed 84 registered participants from 28 IOTA member countries.



The event aroused an outstanding interest among the speakers, with a total of 16 tax officials from 12 IOTA member countries and one speaker from the Organization for Economic Co-operation and Development (OECD) giving presentations covering various topics during the two-day workshop.

Communicating, interacting, and facilitating engagement with taxpayers is important for improving customer experiences and encouraging voluntary tax compliance. This is managed and supported through several touchpoints, or points of contact, varying from face-to-face interactions, phone calls, letters, websites, e-services, and other ways tax administrations interact with taxpayers. Difficulties with these touchpoints may arise, for example, because of a lack of understanding on the taxpayer's side, or when tax administrations' processes are not working as they should.

Some examples of how tax administrations effectively facilitate touchpoints could be well-working taxpayer support processes, effective collaborations, collection of relevant analytical data to support understanding of taxpayer behaviours, successful e-services, or any other systems that enhance and make smoother the interaction between the customer and tax administrations. The workshop was focused on the creation of and logic behind these solutions, rather than on legislative changes or purely technical aspects.

The digital workshop started with a presentation on the *Framework of facilitation of the taxpayers' touchpoints* where Mr. Rex Arendsen from OECD presented the "*Digital Transformation Maturity Model*".

The presentation was followed by a session on the *Overview of the facilitation of the taxpayers' touchpoints* offering the following topics:

- "Armenian Approach to the Facilitation of Taxpayer Touchpoints" by Ms. Liana Movsisyan & Ms. Marianna Shirinyan
- "The Spanish experience in the facilitation of the taxpayers' touchpoints" by Ms. Gema Jimenez
- "An overview of taxpayer touchpoints within the Dutch Tax Administration" by Mr. Wop Leeuwen.

On the first day of the workshop, the question on the "*Strategies, approaches, and methods to facilitate or reduce taxpayer touchpoints*" raised a great interest among the tax officials, where several country presentations reflected on the topic:

- "ATGO – Manage your activity" by Ms. Ana Quintela, Portugal
- "Accessible and personalized services, strategy & Citizen Relationship Management: Implementation and evolution of Taxpayer Touchpoints" by Mr. Dirk Vyverman, Belgium
- "One-stop shop service" by Mr. Steve Lahos, Luxembourg
- "New service solutions and channels for customers" by Mr. Gintaras Arbutavičius & "The virtual assistant of the STI – SIMAS" by Mr. Šarūnas Gurklys, Lithuania

The second day of the workshop started with a discussion on how to develop customer-centric touchpoints positioning the client's needs in the focus of the tax administration's strategy design with the following presentations:

- Poland: "Multichannel approach in National Revenue Administration in Poland" by Ms. Katarzyna Prus-Malinowska
- Ireland: "Customer Centric Delivery for our older Customers" by Ms.Emma Brennan
- Italy: "From customer satisfaction to the customer experience" by Ms. Emilia Trastullo

During the plenary sessions on the second day, a number of tax administrations reflected on the topic *"Best practices for effortless and effective interaction with the taxpayers"* with the following presentations:

- "Learning how to measure customer needs" by Ms. Åsa Jenslin and Mr. Elias Tejnung, Sweden
- "Direct personal contact via video with citizens and businesses" by Mr. Robert Lommers, the Netherlands
- "Model for Customer Contacts in Finnish Tax Administration by Mr. Janne Myyry, Finland

All the plenary sessions were followed by a Q&A discussion.



22.04.2022

ISORA Training 2022 in Oslo, Norway – Enroll in Now!

We are happy to announce that a joint IOTA-OECD ISORA workshop "Survey completion and data usage", hosted by the Norwegian Tax Administration, will be organized between 15th–

16th June 2022 in Oslo, Norway. The workshop is now open for registration until 20th May 2022. The purpose of the event is to bring together ISORA country coordinators and analysts using ISORA data and to share best practices on the use of ISORA data between the ISORA countries.

The two-day workshop will provide an opportunity for ISORA country coordinators and analysts using ISORA data to meet in person and to discuss their approaches and experience to complete the survey. Further discussions on how to improve the internal data collection processes and how to resolve complicated issues will take place. During the second day of the event, country representatives will make presentations on the use of ISORA data. The use of ISORA data for organizational planning, performance benchmarking, engagement with other jurisdictions and some guidance on the internal promotion of ISORA data are on the agenda of the event.

Finally, all ISORA partner organizations will make an outlook on the upcoming surveys ISORA 2022 and the comprehensive ISORA 2023.

Further information about the **IOTA-OECD ISORA** workshop is provided, and the country officials should register on the [event's webpage](#).

We would like to welcome you again on an ISORA physical event.

08.03.2022

Enroll in the New Vitara Online Courses - Registrations are Now Open

VITARA is excited to announce that its next online course on *Institutional Governance in English* is now open for registration until 14th March 2022. The three-week course can be completed between 15th March - 5th April 2022. In addition, the application for the French and Spanish versions of the *Strategic Management online course* are also available until 31st March 2022.



VITARA is a joint initiative of four organizations, Inter-American Center of Tax Administrations (CIAT), Intra-European Organization of Tax Administrations (IOTA), International Monetary Fund (IMF), and Organization for Economic Co-operation and Development (OECD).

This upcoming *Institutional Governance online course in English* introduces the internal and external governance frameworks for tax administrations. It covers topics such as the principles of accountability and transparency, governance safeguards, external oversight, internal controls, governance responsibilities for senior leaders in a tax administration as well as organizational considerations in the development and implementation of the governance framework.

Further information about the *Institutional Governance online course in English* is provided, and the government officials should register on the [official website of IMF](#).

The *Strategic Management course* provides fundamental knowledge on the concepts related to strategic management of a tax administration. In addition, the module highlights the different plans tax administrations create in relation to their strategy and its implementation, before it moves on to explain the content, timeline, resources, and tasks needed to develop a plan along with the different planning phases and the hierarchy of plans. The module also elaborates on the common challenges and risks leaders of tax administrations face, the common mistakes made, and international good practices to follow in the strategic management of a tax administration.

About VITARA

VITARA stands for Virtual Training to Advance Revenue Administration. It is an online course specifically designed for tax administrations. The VITARA modules are introductory level modules and designed for busy professionals who wish to improve their skills in tax administration. Find more on VITARA Courses by visiting the [VITARA page](#) on the IOTA, and [Frequently Asked Questions – Online Learning](#) page on the IMF website.

IOTA MEMBER NEWS

25.03.2022

State Revenue Service of Latvia Improves Client Services



In its efforts to improve client service and boost its reputation among users, the State Revenue Service of Latvia (SRS) has initiated internal quality checks both of telephone consultations and answers to electronically submitted questions.

On 1st December 2021, a new quality-control measure – an automated call-back system – was launched to assess client satisfaction with telephone consultations. When a client calls the Electronic Declaration System (EDS) helpline, they are asked if SRS can call them back to assess the quality of services received. If the client agrees, they receive an automated call (usually) by the end of the same business day and are asked to press either “1” for a positive assessment (at which point the call ends) or “2” for a negative assessment. If the client presses “2”, then they are offered a choice of one of three reasons for dissatisfaction – 1) unfriendly attitude, 2) unsatisfactory answer, or 3) other. SRS analysts then review the call.

The call-back system has been used by approximately 27 000 private individuals and 17 000 legal entities. A negative rating was indicated by 3.76% of individuals and 4.6% of businesses. Evaluation of negative feedback revealed that in most cases, the client’s negative evaluation was not warranted: the consultant had provided correct answers and spoke politely and calmly. Negative evaluation was justified in only 10% of cases.

Additionally, the Ministry of Environmental Protection and Regional Development has expanded its “remote public official” services at six additional Unified Client Service Centres (USCS) in cooperation with SRS. Currently, there are 128 Unified Client Service Centres in Latvian municipalities in which residents can apply for some of the most requested state and all municipal services. By 2023, the [Ministry plans to expand the availability of these unified centres to 592 locations](#).

The addition of this service greatly benefits those taxpayers who do not have access to a computer or are not connected to EDS and cannot visit an SRS client centre. Now, those taxpayers can visit their local USCS and provide the USCS client service representative with their tax information who can file the annual tax return on the taxpayer’s behalf. For now, this service applies only to annual tax returns, but additional forms and declarations will be added soon.

This is another step towards encouraging taxpayer compliance and increasing satisfaction with SRS services.

UPCOMING ACTIVITIES

11th-12th May 2022, Digital

Workshop on Tax Gap Estimation and Use – Latest Developments

This workshop aims to identify practical solutions for enhancing tax administrations' capacity in measuring tax gaps, with the final goal of improving their performance.

More specifically, the IOTA event will address the following topics:

- Measuring the tax gaps through various methods (top-down & bottom-up estimates, random audits, risk-based audits, surveys, etc.) - examples of country best practices.
- Recent methodological developments in tax gap analyses, including the use of advanced analytics and machine learning.
- How the tax gap analyses are used within the tax administrations as a tool for measurement of performance, and to target risk-based activities.

Challenges with estimating tax gaps for different segments and using the results for different purposes.

7th-9th June 2022, Budapest, Hungary

Forum on Combating VAT Fraud

“Cross-border VAT frauds in the post-pandemic area”

After more than two years since the outbreak of the pandemic, the IOTA Forum on Combating VAT Fraud has been active virtually connecting the VAT experts and auditors of the IOTA tax administrations. The purpose of this year's Forum is to identify new VAT fraud trends as well as to exchange knowledge and expertise on detection strategies of cross-border VAT fraud.

The main objective is to share with participants concrete VAT fraud cases involving

- digital platforms,
- cryptocurrencies,
- Non-fungible tokens (NFTs),
- Alternative payment platforms etc.

This Forum meets once per year during its two-year Mandate, it provides delegates with an opportunity to discuss a wide range of topics, problems and issues relating to VAT fraud that are in line with the Forum mandate.

15th–16th June 2022, Oslo, Norway

ISORA Workshop "Survey Completion and Data Usage"

A joint IOTA-OECD ISORA workshop is aimed at discussing good practices for ISORA preparation and completion as well as the use of the ISORA data by tax administrations.

The workshop will provide an opportunity for ISORA country co-ordinators and analysts using ISORA data to meet in person and discuss their approaches to complete ISORA survey, the ways to improve internal data collection processes, resolve complicated issues and share the best practices for completing the survey.

LATEST VIDEOS

**Full event and invitation recordings:
(for registered users of the IOTA Website)**



29th Forum of IOTA Principal

The first-ever hybrid IOTA PCP Forum was held between 6th-7th April 2022 in Budapest as well as virtually. This year's Forum "IOTA in 2022 – Back to the Future" was focused on the forward look of the Organisation. **Contact Persons**



26th General Assembly of IOTA

On 29th and 30th June 2022, the 26th IOTA General Assembly will be held in Zürich, Switzerland. Please welcome the official invitation video from the Swiss Presidency and the IOTA Secretariat to the 26th IOTA General Assembly.