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NEWSLETTER - JANUARY 2023

Dear Reader,

We wish you a Happy and Successful New Year! At IOTA we will continue to be dedicated to serve our members in the most effective and valuable way in 2023. May the new year bring us absorbing publications alongside with exquisite events with fascinating and engaging presentations. Talking about events, have you already checked out **IOTA Work Programme 2023 and the Activity Calendar** which are ready fresh and crispy from IOTA Secretariat?

Scroll down to download them and for more News!



Alix Perrignon de Troyes,
Executive Secretary of IOTA

Dear Reader,

It is my pleasure to greet you in the beginning of 2023 that is full with new hopes and new challenges. I would like to take the moment to **look back on 2022** and thank you all for your contributions over the past 12 months.

2022 was a transition year with the introduction of a new operation mode of the Secretariat incorporating lessons learned from the digital operations of IOTA during the COVID-19 pandemic. Regarding the Secretariat, the **new HR guiding principles** have taken into account the new work mode regime (HO and WO) and the implementation of the Code of Conduct. The management policy has been clarified and an Employee Handbook has been published.

Concerning the **IOTA Work Programme activities**, our new event organisation model with the use of the **IOTA Studio in Budapest** has been introduced and is operating successfully, thus we are able to **broadcast live virtual activities**. In 2022, IOTA organised a **total of 20 activities and 5 projects**, mostly under the framework of the newly developed **hybrid format** following its pilot project – the **29th Forum of IOTA Principal Contact Persons** in April. **The 26th General Assembly of IOTA** was held under the **Swiss Presidency** and welcomed more than 150 high-ranking officials from partner organisations (European Commission,

IMF, OECD), the business community and academia along with representatives of IOTA member tax administrations gathering personally at the foot of the Swiss Alps, and over 80 prominent attendees and tax practitioners joining digitally to the entirely new experience after two years of virtual operation.

The Administrative Session of the GA enabled to approve the amended Charter, the **IOTA Code of Conduct**, the **new Strategy 2023-2027**, and to welcome a **new member country; the Iceland Revenue and Customs**. The Technical Sessions of the GA run under the theme '**Compliance and Trust: Affecting tax behaviour while redefining the relationship between taxpayers and tax administrations**' and were split into two parts plenary and breakout sessions with the participation of the tax administrations, the international organisations (IMF, OECD, CIAT) and the business community.

Last but not least, the October's **IOTA Annual International Conference**, organised in collaboration with the **Independent Authority for Public Revenue of the Hellenic Republic (IAPR)** with a topic reflecting the main challenges the tax administrations have to face in this post pandemic period, was also a great success.

However, with the current conflict taking place in Ukraine, 2022 was also a disruptive year for IOTA members as Russia and Belarus have been suspended since March 2022 from all the administrative and technical activities until further notice in respect of the Charter provisions (article 2 and 6.15) approved by the GA.

In **2023**, the main challenges for IOTA will be to implement the **new Strategy 2023-2027** and start the development of the **new Web portal**. The new Strategy is embracing the vision to be a **leading international tax organisation for practical collaboration and knowledge sharing on tax administration issues** for its members and partners with a new value of integrity. The strategic objectives aim at delivering effective high-quality and innovative services, maintaining and expanding organisational excellence as well as increasing international cooperation.

I wish you all good health, happiness, and success for the New Year, and a good reading of this 1st Newsletter of the year 2023!

IOTA NEWS



IOTA Work Programme 2023 and Calendar of Activities are out

We proudly announce that the always awaited IOTA Work Programme and the Activity Calendar are out. In 2023 IOTA is expected to deliver a viable annual Work Programme that is sufficiently strategic, flexible and capable of meeting the needs of the membership. These priorities set out clear directions of where the work of IOTA will focus in term of

- **identifying and supporting** the implementation of good tax administration practice, and
- **assisting and facilitating** IOTA members in preparing for and working collaboratively towards meeting the key emerging challenges for tax administration.

Also, the IOTA Work Programme will bring **more diversity and flexibility providing opportunities to organise tailored (special interest, regional or country-specific) events and intra-collaboration projects** with tangible products and outputs to address urgent needs for a collective and immediate action or solution, particularly requiring multilateral and crossborder co-operation between IOTA members.



Scan to download IOTA Work Programme
2023



Scan to download IOTA Calendar of Activities 2023



IOTA representatives at the ISORA and Vitara technical working group meetings in Washington DC, USA

On 28th-30th November 2022, the IOTA Secretariat's delegation including **Roman Bichevoy** (*Strategy & Institutional Development Manager*) and **Oksana Stepanenko** (*International Taxation Expert*), represented IOTA at the ISORA Technical Working Group (TWG) meeting in Washington DC, the USA. The event was held under the chairmanship of the International Monetary Fund. International survey of revenue administrations (ISORA) is an annual global survey covering more than 160 jurisdictions, including all IOTA members. Having such a wide coverage of jurisdictions, currently ISORA is the largest resource of qualitative and quantitative tax administration data. Representatives of all five partner international organizations (IMF, OECD, ADB, CIAT and IOTA) took part in the ISORA TWG meeting under the chairmanship of the IMF.



HR Updates on the IOTA Secretariat - Our Local Team has Expanded

We all know that every new year brings new beginnings, challenges, developments, and of course, sometimes new personnel changes at the IOTA Secretariat. We are pleased to announce a new colleague on board. **Barbara Berkesi** joined our team as a **Specialist of Technical Activities** on 1st December 2022, and from this year she will replace Laura Lempner in this key role. IOTA Secretariat also welcomes back **Diána Schreiter**, who was on maternity leave in the past years and she rejoined the team in part-time at the end of the last year as the **Publication Specialist**. Our members also meet and connect **Erika Szabo** in the new year. She will continue to be the **Specialist of Communication** at IOTA.

Scan to read more about IOTA representatives at the ISORA and Vitara technical working group meetings in Washington DC, USA



Scan to read more about HR Updates on the IOTA Secretariat – Our Local Team has Expanded



Forum on Implementation of Measures to Counter Base Erosion Profit Shifting (BEPS)

6-8 December 2022, Budapest, Hungary

Forum on Implementation of Measures to Counter Base Erosion Profit Shifting (BEPS)

On 6th-8th December 2022, IOTA successfully hosted the 7th IOTA Forum on Implementation of Measures to Counter Base Erosion Profit Shifting (BEPS) in Budapest, Hungary. The hybrid event was joined by high-ranking officials from our international partner organisations and the business community along with over 40 participants from 28 IOTA member tax administrations gathering personally at the venue and more than 120 attendees connecting online to the new experience.

Scan to read more about the Forum on Implementation of



IOTA Executive Secretary at the Technical Conference of DET

On 12th-13th December 2022, Alix Perrignon de Troyes, the Executive Secretary of IOTA participated as a panellist at the Technical Conference of Digital Economy Taxation Network (DET) and high-level policy dialogue on “The Impact of Technologies on Emerging Tax Policy Issues” in Vienna, Austria. The event brought together more than 40 delegates from tax administrations, international organisations along with participants from the business community and research institutions to discuss and assess the latest developments in digital tax transformation.



Digital Workshop on Management of Compliance Risks Posed by Crypto-assets and Virtual Currency

On 16th December 2022, IOTA successfully carried out its last activity this year. The digital workshop showcased a very up-to-date subject on *Management of Compliance Risks Posed by Crypto-assets and Virtual Currency*. The event was broadcasted live from the IOTA Studio in Budapest, and brought together an exciting mix of global thought leaders from our international partner organisations (OECD, European Commission DG TAXUD, ENFIN and ENLETS) along with representatives from IOTA member tax administrations.



Scan to read more about IOTA Executive Secretary at the Technical Conference of DET

Scan to read more about the Digital Workshop on Management of Compliance Risks Posed by Crypto-assets and Virtual Currency



Forum on the Use of Data from the Automatic Exchange of Information (AEOI)

13-15 December 2022, Budapest, Hungary

Forum on the Use of Data from the Automatic Exchange of Information (AEOI)

On 13th-15th December 2022, IOTA opened the floor for its last Forum Meeting this year. The Forum on the Use of Data from the Automatic Exchange of Information (AEOI) brought together a distinguished group of thought leaders, representatives from international partner organisations (OECD), the business community (KPMG UK, EY UK) along with more than 35 tax professionals (advisors, inspectors, managers, data scientists) from IOTA member tax administrations to discuss key issues helping to ensure the effective use of the CRS data and increase the effectiveness of automatic exchanges of information under CRS.



Scan to read more about the Forum on the Use of Data from the Automatic Exchange of Information (AEOI)



Update on the appointment of the Director-General of the Slovenian Financial Administration

The Financial Administration of the Republic of Slovenia has appointed Mr. Peter Grum as Director-General for a five-year term with the possibility of reappointment. He took the office on 10 December 2022 and his mandate will be ending on 9 December 2027. Mr. Grum holds a Master's degree in Law. He worked at the Financial Administration of the Republic of Slovenia and its predecessor, the Tax Administration of the Republic of Slovenia, for 14 years, from 2006 to 2020.



Scan to read more about the Update on the appointment of the Director-General of the Slovenian Financial Administration



The Spanish Tax Agency and the Platform of the Elderly and Pensioners to Sign a Collaboration Agreement to Enhance Assistance Services

On 19th December 2022, the Spanish Tax Agency and the Platform for the Elderly and Pensioners have signed a protocol setting the basic guidelines of the assistance that the AEAT offers to the elderly and a general framework of collaboration for future actions. The protocol underlines the commitment of the Tax Agency to deliver a customized assistance to the elderly through the promotion of actions that assure them a complete and updated tax information.



Scan to read more about The Spanish Tax Agency and the Platform of the Elderly and Pensioners to Sign a Collaboration Agreement to Enhance Assistance Services

Latvia Automates Inclusion of Medical Expenses on Tax Returns



Taxpayers in Latvia can reduce paperwork when filing their annual tax returns by having the medical institution automatically send an electronic receipt to the State Revenue Service (SRS). The patient must confirm his/her consent in writing with the medical institution to have data included in the e-receipt sent to the SRS. The person

does not attach the receipt when filing the annual tax return because the information is already added automatically.



Scan to read more about Latvia Automates Inclusion of Medical Expenses on Tax Returns

UPCOMING ACTIVITIES

Please note: registration for the below events is only possible for Principal Contact Persons of IOTA. If you would like to attend, kindly contact the PCP or Shadow PCP of your Tax Administration to invite you to the event you are interested in.



1-2 March 2023, Digital via MS Teams

Workshop “Tackling Cross-Border VAT Fraud in Goods and Services/Intangibles and VAT Fraud Schemes in the Digital Economy”



14-16 March 2023, Digital via MS Teams

Workshop “Use of Data from Information Exchange under the BEPS 12 Action Plan (DAC6)”

The registrations for these events will open later this month and more details and further events featured in our February Newsletter will land right in your mailbox.

Stay tuned!



Scan to IOTA Calendar of Activities 2023

LATEST VIDEOS

Please note: full event recordings are only available for registered users of IOTA Website



IOTA FORUM on Implementation of Measures to Counter Base Erosion Profit Shifting (BEPS)



Scan to watch IOTA FORUM on Implementation of Measures to Counter Base Erosion Profit Shifting (BEPS)

LATEST PUBLICATIONS

IOTA PAPER

AN INNOVATIVE MEAN FOR IMPROVING VOLUNTARY FISCAL COMPLIANCE BY SHARING TRANSPARENCY

We're pleased to announce that our latest IOTA Paper in collaboration with the Italian Revenue Agency is issued today. The new Paper runs under the title 'An innovative mean for improving voluntary fiscal compliance by sharing transparency' and is written by Stefano Latini, Press Officer of the Italian Revenue Agency.





Scan to read the IOTA Paper

Submit your IOTA Paper!

Would you like to see your IOTA Paper published? Do you have any relevant issues you wish to share? Apply NOW!

Please note: Before submitting your paper, kindly contact the IOTA PCP of your Tax Administration for approval and include them in your correspondence with us as well. Thank you for your cooperation!



Scan to submit your IOTA Paper



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