



**IOTA**

Intra-European Organisation  
of Tax Administrations

# **IOTA STRATEGY** **2023-2027**

Approved by the  
**26<sup>th</sup> General Assembly on 29 June 2022**  
Reviewed by the  
**29<sup>th</sup> General Assembly on 17 June 2025**

## Prepared in 2022

This document was prepared by the **Strategy working group** consisting of the following representatives:

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## VISION

To be a leading international tax organisation for practical collaboration and knowledge sharing on tax administration issues for its Members and partners.

## MISSION

IOTA is contributing to the progress of member tax administrations by delivering practical solutions, enhancing collaboration and facilitating the sharing of experience.

## VALUES

### *Professionalism*

IOTA is a politically neutral forum dedicated to professional co-operation. IOTA is focused on delivering expertise, guidance, best practice, and knowledge to its Members. Tax policy is out of IOTA's scope.

### *Transparency*

IOTA is delivering its ambitious activities with transparency, disclosing all relevant information to its Members. IOTA is also committed to being accountable to its Members in relation to the Organisation's internal processes, decisions, and performance.

### *Partnership*

IOTA offers a platform where tax administrations and other international stakeholders can meet and voluntarily engage in an exchange of best practice and experience, on an equal footing. The relations and working principles within IOTA are based on equality, trust, respect, reciprocity, and cooperation whilst the aim is to develop mutual benefits. IOTA promotes partnership both between its Members as well as with other international organisations.

### *Integrity*

As a trustworthy Organisation, IOTA respects its commitments in delivering its services for the common interest of its Members, to uphold its reputation, to act with honesty and to be entirely above personal interest of any member, role or individual.

## STRATEGIC OBJECTIVES

### 1 Effective delivery of high-quality and innovative services

- 1.1 Deliver effective services and practical solutions catering for the specific needs of the membership;
- 1.2 Develop innovative services;
- 1.3 Foster practical collaboration and knowledge sharing amongst Members

Building on existing competencies, continue to deliver and enhance high quality services to the Members. Introduce innovative services and develop new ways of providing existing services with greater efficiency for the benefit of its Members. These services include, but are not limited to, technical events and activities, projects, technical assistance, benchmarking, technical enquiries, knowledge bases, e-learning.

### 2 Organisational excellence

- 2.1 Ensuring sufficient and sustainable human and financial resources to deliver its mission and vision;
- 2.2 Strengthened engagement with Members to maximise benefits from IOTA activities
- 2.3 Ensuring optimal processes;
- 2.4 Enhanced digitalisation of IOTA services and operations;
- 2.5 Effective internal and external communications;

In order to maintain and expand portfolio of services the organisation will maintain optimal capacity. IOTA will regularly assess membership engagement, then plan and execute measures to retain and increase it, including enhancing the involvement of senior officials. Streamline key processes of IOTA which are critical to the organisation's performance. Utilise new technology and methods to continuously improve the range and quality of services delivered to Members, membership participation, and operations. IOTA will improve communications in order to meet the needs of its Members, partners and other stakeholders.

### 3 International cooperation

- 3.1 Identify opportunities to coordinate and collaborate with international and regional partners for the mutual benefit of the organisations and their Members
- 3.2 Be a pro-active contributor to practical implementation of global tax initiatives;

Conduct regular assessment of existing partnerships and identify possible new ones in order for IOTA Members to gain access to best practices outside of IOTA region. Engage with partners to promote IOTA and avoid duplication of activities.

### 4 Development

- 4.1 Explore and enhance modalities of involvement of Associate members in IOTA and attract new Associate members
- 4.2 Strengthen cooperation with Observers
- 4.3 Explore opportunities for collaboration with institutions that work in research and study fields

Explore different modalities of involvement of Associate members in IOTA in order to bring benefit to Members. IOTA should attract new Associate members that could bring value to the membership. Cooperation with Observers is to provide Members with knowledge and innovative solutions. Explore opportunities to collaborate with institutions involved in research and study projects that could be beneficial to IOTA Members.

## IMPLEMENTATION, MONITORING AND EVALUATION OF THE STRATEGY

The monitoring of the Strategy implementation is the responsibility of the Executive Council. It will be implemented through annual implementation plans. The annual implementation plan will be drafted with the support of the Secretariat and approved by the decision of the Executive Council. An annual status report on Strategy implementation, part of the annual report of IOTA, must be prepared, with support from the Secretariat, adopted by the EC and presented to the General Assembly. A mid-term Strategy review is to be performed following the second year of the Strategy implementation.

