

## AGENDA

<b>OECD-IOTA Partnership Event</b> <b>“Tax Debt Management Maturity Model”</b>	
6-7 November 2024 Digital Workshop via Microsoft Teams	

*All times are to be considered as Central European Time (CET)*

### WEDNESDAY 6 NOVEMBER 2024

12:30 – 13:00	<b>Connection and access to the event by registered participants</b> <ul style="list-style-type: none"> <li>Registered participants will be able to connect before the start of the event and test the functioning of the MS Teams</li> </ul>
13:00 – 13:15	<b>Introduction to the Workshop</b> <ul style="list-style-type: none"> <li>The IOTA Secretariat (Eugenijus Soldatkovas and Ivana Donchevska) will give an introduction outlining the agenda and highlighting the objectives and expected outcomes of the workshop.</li> </ul>
13:15 – 13:45	<b>Plenary Session 1 - Introduction to the OECD Tax Debt Management Maturity Model</b> <ul style="list-style-type: none"> <li>Presentation by Eri Kataoka, the OECD FTA Secretariat</li> <li>Q&amp;A session</li> </ul>
13:45 – 14:45	<b>Plenary Session 2 – Experiences of Tax Administrations Conducting Self-Assessments</b> <p><i>Presentations will cover the practical experiences, challenges faced, successes and lessons learned on conducting self-assessment, organisation of the process of self-assessment, operational tools used, conclusions drawn, targets/goals after the assessment, strategies to increase the maturity level, challenges, etc.</i></p> <ul style="list-style-type: none"> <li>Presentation “Maturity Model Self-assessment -the Portuguese Experience” by Andreia Castro Carmo, Portugal</li> <li>Presentation “Debt Management Maturity Self-Assessment - experiences and challenges” by Ena Šeremet, Bosnia and Herzegovina</li> <li>Presentation “USA’s Experience Completing The Tax Debt Maturity Model” by Fred Schindler, USA</li> <li>Q&amp;A Session</li> </ul>
14:45 – 15:00	<b>Wrap Up</b> <ul style="list-style-type: none"> <li>The IOTA secretariat will close with some thoughts on the day and expectations for day 2</li> </ul>

THURSDAY 7 NOVEMBER 2024	
12:30 – 13:00	<b>Connection and access to the event by registered participants</b> <ul style="list-style-type: none"> <li>Registered participants will be able to connect before the start of the event and test the functioning of the MS Teams</li> </ul>
13:00 – 13:10	<b>Recap of Day 1 and Introduction to Day 2 of the Workshop</b> <ul style="list-style-type: none"> <li>IOTA Secretariat</li> </ul>
13:10 – 13:50	<b>Plenary Session 3 – Experiences of Tax Administrations Conducting Self-Assessments</b> <p><i>Presentations will cover the practical experience of self-assessment of the tax debt management maturity model</i></p> <ul style="list-style-type: none"> <li>Presentation by “Maturity Model – the Norwegian experience” by Kathrin Urdshals Nystad, Norway</li> <li>Presentation by Mark Goodridge, the UK</li> <li>Q&amp;A Session</li> </ul>
13:50 – 14:50	<b>Group Discussion Session – Implementing the Tax Debt Management Maturity Model in Practice</b> <ul style="list-style-type: none"> <li><i>This session will offer the opportunity for the participants to share and discuss the practical aspects of implementing the Tax Debt Management Maturity Model along with their considerations for using the Model to increase the maturity level in tax debt management.</i></li> <li><i>This session will take place in virtual breakout rooms.</i></li> </ul>
14:50 – 15:00	Break
15:00 – 15:20	<b>Plenary Session 4 – Feedback from the Group Discussion</b> <p><i>Feedback from the Chairpersons of the Group Discussion</i></p> <ul style="list-style-type: none"> <li>IOTA Secretariat</li> <li>Chairpersons</li> </ul>
15:20 – 15:45	<b>Plenary Session 5 – Panel Debate</b> <p><i>The discussion will focus on utilizing the maturity model as a framework for both enhancing strategies and reforms within various jurisdictions and facilitating global capacity building in tax debt management.</i></p> <ul style="list-style-type: none"> <li>Mark Goodridge, UK</li> <li>Andreia Castro Carmo, Portugal</li> <li>Fred Schindler, USA</li> <li>Ena Šeremet, Bosnia and Herzegovina</li> <li>Michael Roekaerts, Belgium</li> </ul>
15:45 – 16:00	<b>Closing Remarks</b> <ul style="list-style-type: none"> <li>OECD FTA Secretariat</li> <li>IOTA Secretariat</li> </ul>
16:00	<b>End of the Workshop</b>