



BACKGROUND NOTE

IOTA Digital Workshop
**“Customer centricity now, and in the future – case studies
from different tax administrations”**

24-25 September 2025 from 10:00 - 12:00 (CEST)
Digital Workshop via Microsoft Teams

BACKGROUND

A customer-centric approach in tax administration redefines how tax authorities interact with taxpayers and design services for them by placing their needs, behaviours, and experiences at the centre of service delivery. Rather than focusing solely on enforcement and compliance, this approach views taxpayers as partners and active participants in the system.

The first step in this transformation is understanding who the taxpayers are. Authorities analyse different groups – such as individuals, small businesses, and corporations – to tailor services that meet their specific needs. Services are designed to be simple, accessible, and user-friendly. Instead of waiting for taxpayers to make mistakes, customer-centric tax administrations communicate proactively with reminders, updates, and educational materials to prevent errors and confusion. Digital tools play a major role, allowing taxpayers to file returns online, receive automated assistance, and access services at any time.

Customer-centric approaches influence all stages of service delivery, from initial ideation through to execution and ongoing maintenance. At each step, the effects of changes on taxpayers are considered in decision making. Customer-centric methods of research and design also necessitate a change of mindset from old, organisation centric modes of operating. This means prioritizing empathy, responsiveness, and continuous improvement based on user feedback.

Importantly, customer centricity does not mean being lenient. It balances support with strong enforcement for those who intentionally avoid compliance. By making it easy to comply and hard to evade, tax authorities can build trust and improve overall compliance.

This IOTA Workshop will provide an essential platform for tax administrations to explore and discuss these emerging opportunities: higher voluntary compliance, better data, and greater public confidence for tax authorities while fewer barriers and less frustration for citizens. Additionally, it will provide an opportunity to discuss real-practical examples of



customer centricity in tax administrations, different approaches to transition to user-focused service models, and explore future directions for sustaining and amplifying this shift.

OBJECTIVES

The objectives of this Digital Workshop are to:

- Share different approaches to customer centricity in tax administrations as well as concrete cases of its implementation.
- Explore how tax administrations can adapt to customer-centric approach in services delivery and the possible challenges.
- Discuss strategies and future developments of customer-centric approaches for tax administrations.

EXPECTED OUTCOMES

The expected outcomes of this Workshop are:

- Gain a deeper understanding of the different approaches and implementations to customer centricity.
- Learn strategies for the future of customer-centric development in our organization;
- Learn best practices and successful implementations for tax authorities.

METHODOLOGIES

The Workshop will be conducted via the Microsoft Teams meeting platform **on 24 and 25 September 2025 (10:00 to 12.30 Central European Summer Time)**.

The Workshop is expected to last 2 days and will be delivered through a combination of **presentations, Q&A sessions and Panel Debates**. The **presentations** will cover tax administration experiences in the implementation of customer-centric approaches. The attendees will have the opportunity to raise questions and explore the topic further during the **Q&A and Panel Debate sessions**.

There is **no limit** to the number of participants who can attend the IOTA Workshop.

Joining instructions will be provided on how to join and participate in the IOTA Workshop using the Microsoft Teams platform. There will be an opportunity for delegates to test their connection 30 minutes prior to the start of the Workshop.

The IOTA Workshop will be recorded and made available on the IOTA website (only for registered users) to watch on-demand after the event.

TARGET AUDIENCE

The target audience is officials from IOTA member tax administrations who are involved in the fields of tax customer services.

REQUIRED INPUT

Please note that IOTA expects that all participants will have sufficient language skills for active participation in English.