



Ludwig de Winter, Deputy Head of Unit DG Taxation and Customs Union, European Commission "VAT in the Digital Age Package: Overview and Update including Preliminary Evaluation of the OSS and IOSS"



Daniel Jakobsen, Head of Tax, Falck "Indirect Tax's Proactive Role in Finance Transformation"



Rishi Gainda, Global Head of Indirect Tax & Tax Technology, Unilever "Tax Technology – From Strategy to Business Case"

Stefanie Dreher, Head of VAT EMEA, UPS "Update on our VAT Compliance Transformation: From SSC to Co-sourcing"



Charlotte Schellerup, Senior Indirect Tax Tech & Process Manager, Falck "Indirect Tax's Proactive Role in Finance Transformation"



Werner Engelen, Head of Policy and Controversy, LEGO "How Indirect Tax Plays a Key Role in BEPS? And the Impact of the G7 Tax Deal"



Jean-Francois Turgeon, Senior Manager Indirect Tax, Caterpillar 'Managing VAT in Complex Chain Transactions"



Riccardo Cassisa, Senior Official, Tax Administration "Making Vat Digital and Supporting Voluntary Compliance"

Sponsors:





Prof. Dr. David Hummel, Legal Secretary, European Court of Justice "Fixed establishments in the VAT-jurisprudence of the CJEU"





Joe Power, VAT Director & Tax Transformation Leader. Medtronic "How to Transition from being a Tax Manager into a Tax Technology Manager"



Gorka Echevarria, Global VAT Leader, Lexmark "Optimising VAT Cash Flow"



Nora Bafrouri, Asst Tax Director - Indirect Tax EMEA & Tax technology EMEA, APAC, LATAM, Trane Technologies "Managing the Indirect Tax Function as an Added Value Strategic Function for the Business"



Irmante Stazyte Wouters, Global Director of Tax, Duracell "VAT & Customs Interaction with Transfer Pricing"



Ana Brosa, Senior Product Manager Tax, Nestle "Managing a Variety of Supply Chain VAT Challenges"



Nicoletta Petrosino, Global Indirect Tax Manager, Nestle "Managing a Variety of Supply Chain VAT Challenges"



Maria Cambien, VAT Manager EMEA, Goodyear "Quick Fixes: How Much do They Really Fix? Some Practical Aspects"



Aleksandra Bal, Indirect Tax Technology and Operations Lead, Stripe "Taxing Digital Services Across the Globe"











### Day 1, May 19th, 2022

08.30 - Registration and Coffee 09.00 - Opening Remarks from the Chair **Jun Miyake**, Principal Tax Technology, **Ryan** 

#### 09.15 - VAT in the Digital Age Package: Overview and Update including Preliminary Evaluation of the OSS and IOSS

Ludwig de Winter, Deputy Head of Unit DG Taxation and Customs Union, European Commission

10.00 - Tax Transformation Challenges and Solutions

Peter Boerhof, VAT Director, Vertex

### 10.45 - Tax Technology: From Strategy to Business Case

- Potential features of a tax technology strategy
- How to draft a roadmap for technology
- Pointers when building a business case
- Sharing of experience within broader group **Rishi Gainda**, Global Head of Indirect Tax & Tax Technology, **Unilever**

11.30 - Coffee and Networking

# 12.00 - Now and Next in Indirect Tax and Technology

Despite a significant technology skills gap, new technology and automation was the #1 strategy Indirect Tax teams used to address resource gaps in 2021, according to the Thomson Reuters State of the Corporate Tax Department Report.

Gunjan Tripathi, Senior Manager, Product Marketing, Indirect Tax at Thomson Reuters, will discuss:

- The landscape at large and the tax changes becoming ever-more digital
- Strategic challenges for Indirect Tax teams in 2022
- Trends in Indirect Tax what's on the horizon
- Indirect Tax Technology and automation

Gunjan Tripathi, Senior Manager, Product Marketing, Thomson Reuters

#### 12.45 - What if There Was an (Almost) Painless Way to Transform the Tax Function? The Road to Digital Stewardship

- Understanding the Conditions for a Meaningful Breakthrough
- Tax must belong to Tax, because in reality nobody else can help
- The Puzzle Pieces are already there; They just need
   Assembling
- From IT to Permanent Digitalization and a Tax Data Platform

### Geoff Peck, Founder and Chief Taxologist, PawPaw Taxology

13.30 - Lunch Break

#### 14.30 - Indirect Tax's Proactive Role in Finance Transformation

Why it is super relevant to involve Global Tax in the earlier stages of finance transformation projects. To be one of the decisionmaker or a great stakeholder in the implementation/transformation phase is not enough. The caricature of legacy is affecting VAT – however, VAT is indeed affecting the architecture of the legacy, too. Charlotte and Daniel will share experiences of stakeholder management and their involvement in analysis phase of a full ERP/FI system implementation.

Then we can ensure a future readiness systems and processes related to indirect taxes that also (of course) ensure trusted data, transparency and to meet with new VAT trends and digital filling requirements.

### Daniel Jakobsen, Head of Tax, Falck

Charlotte Schellerup, Senior Indirect Tax Tech & Process Manager, Falck

#### 15.15 - The Thin Line Between Survive and Thrive: Navigating the Indirect Tax Road Ahead

You spoke, we listened (and learned). Hear what 160 tax professionals had to say about the current and future state of their tax functions, including top trends, challenges, and priorities. Learn about the differences between various sized organisations and tax versus finance, as well as hear perspectives ranging from C-level executives to tax managers. Overall, what do these findings mean for the future direction of indirect tax? **Scott Fowler**, Principal and Client Services Leader, **Ryan** 

#### 16.00 - Taxually Presentation

16.45 - Afternoon Coffee and Networking

#### 17.15 - Beyond Tax Technology: Automated Posting via Clearance Model

Ridvan Yigit, Partner and CCO, SNI Technology

#### 18.00 - Making Vat Digital and Supporting Voluntary Compliance

- e-invoicing
- Esterometro
- tax free shopping
- Pre-filled Vat returns

Riccardo Cassisa, Senior Official, Tax Administration

#### 18.45 - How to Transition from being a Tax Manager into a Tax Technology Manager

- Develop Tax Technology Skillsets instead of Relying on IT
- What is the role of a Tax Technologist?
- Tax Technologists vs Taxologists
- Garbage In, Garbage Out: Getting on top of ERP data
- Defining a standard set of transaction scenarios
- Getting in control of your transactional data
- How to understand tax engines

Joe Power, VAT Director & Tax Transformation Leader, Medtronic

19.30 - Closing Remarks from the Chair and End of Day 1



### Day 2, May 20th, 2022

09.00 - Opening Remarks from the Chair Suzanne den Breems, Principal, Practice Leader, VAT Consulting and Recovery, **Ryan** 

#### 09.15 - Fixed Establishments in the VAT-Jurisprudence of the CJEU

- Fixed establishment in the VAT-directive
- Personal staff required for a fixed establishment?
  Subsidiary as a fixed establishment of the parent
- company?
  Recent case law of the European Court of Justice (Dong Yang and Titanium)

Prof. Dr. David Hummel, Legal Secretary, European Court of Justice

#### 10.00 - Quick Fixes: How Much do They Really Fix? Some Practical Aspects

- Facing the reality which of the quick fixes really work in practice?
- What complexities/ burden did they add?
- Will there be other quick fixes or will there be a willingness for a more fundamental change?

Maria Cambien, VAT Manager EMEA, Goodyear

#### 10.45 - Managing a Variety of Supply Chain VAT Challenges

- Entailing the VAT rules
- Assessing the IT challenges
- How to make it happen

Nicoletta Petrosino, Global Indirect Tax Manager, Nestle Ana Brosa, Senior Product Manager Tax, Nestle

11.30 - Morning Coffee and Networking

# 12.00 - Managing the Indirect Tax Function as an Added Value Strategic Function for the Business

- A clear plan for your key stakeholders to benefit generic business process
- Promoting standardization, reporting, etc.
- Seeing yourself indirect tax manager as an
- enabler and align with the right stakeholders in the right way
- Cascading tax technology knowledge in the tax, finance and IT departments
- A New Cooperative Relationship with Tax, Finance, IT and Taxing Jurisdictions

Nora Bafrouri, Asst Tax Director – Indirect Tax EMEA & Tax technology EMEA, APAC, LATAM, Trane Technologies

#### 12.45 - Update on our VAT Compliance Transformation: From SSC to Co-Sourcing

- Planning is key
  - Scope, entities, timeline
- Transition process
- Lift & shift versus direct improvement
   Lessons learned

• Lessons learned Stefanie Dreher, Head of VAT EMEA, UPS

13.30 - Lunch Break

#### 14.30 - How Indirect Tax Plays a Key Role in BEPS? (and the Impact of the G7 Tax Deal)

Werner Engelen, Head of Policy and Controversy, LEGO

# 15.15 - Managing VAT in Complex Chain Transactions

- How to determine the VATable and VAT exempt supply in chain transactions?
- Different approaches of some EU member states
- Impact of recent EU rules on chain transactions
- Practical aspects regarding chain transactions in tax inspections

Jean-Francois Turgeon, Senior Manager Indirect Tax, Caterpillar

#### 16.00 - Optimising VAT Cash Flow

- Changing the VAT return filing period (eg. from quarterly to monthly) to receive refunds sooner; or switching to a longer VAT return filing period to postpone VAT payments
- Filing VAT returns as a "fiscal unity" (single consolidated VAT return) so that VAT payment positions of some companies in the unity can be offset against VAT refund positions of other companies
- Transferring VAT refund rights
- Changing to cash accounting to minimise VAT due for unpaid sales
- Other strategies to improve the cash position
- Gorka Echevarria, Global VAT Leader, Lexmark
- 16.45 Brief Afternoon Coffee and Networking

#### 17.00 - Taxing Digital Services Across the Globe

- Comparing EU, US, LATAM and APAC approaches to taxing digital services
- Compliance perspective
- Recent developments

Aleksandra Bal, Indirect Tax Technology and Operations Lead, Stripe

# 17.45 - VAT & Customs Interaction with Transfer Pricing

 Customs value and royalty payments: inclusion in the dutiable basis, assessment from a pure VAT & Customs perspective

Transfer Pricing corrections: invoicing and reporting

Irmante Stazyte Wouters, Global Director of Tax, Duracell

18.30 – Closing Remarks from the Chair and End of Forum



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#### WHY YOU SHOULD ATTEND

Successful Indirect tax management has the potential to significantly reduce costs and inefficiencies, having a substantial bottom-line impact. The difficult regulatory environment and business environment has led to the goal for multinationals to transform their billing, purchasing, customs and VAT compliance processes. Standardisation, automation and efficiency are the new objectives. This is especially true in the current uncertain environment.

Companies are continuing to construct tax control frameworks in order to demonstrate quality self-assessments to tax authorities, and indirect tax plays a central role in this. Digitisation is being employed by corporate taxpayers, tax authorities and new directives are being written for e-commerce.

There are many different strategies to choose from to determine the correct compliance management business model for your enterprise. Whether to centralise or decentralise, use a tax control framework, and how to apply lessons learned is of critical importance. Tax technology and automation holds a vital role in this process, and it is important to correctly fit technology with your compliance and reporting processes. Centralisation and technology trends are also driving companies towards adopting VAT compliance programmes. Significant EU VAT reform is on the horizon while VAT and GST reform is occurring all over the world.

Utilise this fourteenth edition leading event to benchmark how leading multinationals are implementing new indirect tax initiatives in their operations. Hear their perspectives on VAT risk, compliance and VAT automation, in an informal interactive environment. Attend this event to learn from their experiences, compare approaches and take away concrete strategies that you can use to improve indirect tax strategy in your enterprise.

Terms and Conditions: 1. Event Fees are in inclusive of materials in the programme and refreshments. 2. Payment Terms: Following completion and return of the registration form, full payment is required within 6 days from receipt of invoice. Payment must be received before the conference date. A receipt will be issued upon payment. Due to limited conference space, we recommend early registration to avoid disappointment. A 50% cancellation fee will be charged under the terms outlined below. We do reserve the right to refuse admission if payment has not been received on time. 3. Cancellation/Substitution: Provided the total fee has been paid, substitutions at no extra charge are allowed as loon as they are made un to 15 days before the event Otherwise all boxions carrue a 50% of cardionation organization in mode in the data and the feed has been pain, substantiates and the analysis of a second s

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