Outgoing President: There’s been a lot going on

Briefings



27 May 2025

Outgoing President Charlotte Barbour highlighted the wide range of CIOT activity over the past year in her speech to the Institute’s AGM on 29 May.

I pay tribute to all those who support the CIOT, including staff, branch committees and my fellow Council members. Thank you to Penny Tuck, Sarah Hewson and Jonathan Riley, who are standing down as committee chairs, and to Kriss Mikata-Pralat, who is coming to the end of his term as lay adviser.

This time last year, I spoke about how central our qualifications are to what we do. In particular, we need to ensure that the CTA remains an attractive proposition, maintains standards and meets the needs of today’s students and employers. So we have begun a review and launched a consultation which I invite all of you to consider contributing to, whether you are a member, student or employer.

Associated work is also being done to ensure the relevance of the Joint Programme of CTA/ACA as both the CIOT and the ICAEW change their syllabus. Similar work will be undertaken in due course on the ADIT qualification – our Advanced Diploma in International Taxation.

As I look back over the year there have been a number of themes running though our work.

Election and AI

First, there was the general election. The Institute's external relations and technical teams pulled out all the stops to produce some excellent 'explainers'. Topical matters, such as VAT on school fees and the corporate tax roadmap, were carefully examined in our debates held with the Institute for Fiscal Studies.

And we also used the election period to draw attention to key tax administration issues, such as the need for simplification and a more thoughtful approach to digitalisation. This included an article I wrote for the *Financial Times* and letters to party spokespeople, which in turn led to post-election conversations.

Second, we have maintained the focus on AI in tax with:

- a wide offering of member-facing discussions, such as the Tax Technology podcasts and at last year's Cambridge conference;
- our Diploma in Tax Technology and new short course in AI for tax;
- enhanced CPD offerings; and
- the forthcoming Tax Technology Conference on 4 June.

I'm pleased that the Institute has been able to give such strong support to members in this crucial area. AI in tax needs to be understood and the appropriate tools well utilised if we are to maximise its benefits in our practices and work.

Raising standards

Third, for a number of years there have been serious concerns about the service standards offered by HMRC to both taxpayers and advisers. We have continued to press for improvements. Last year, to establish what is causing the problems, CIOT, along with ICAEW, conducted a major research project, seeking to answer the

question: why is it that we are contacting HMRC?

I'm most grateful to the 31 firms that took the time and trouble to log every interaction they had with HMRC over a six week period. I can commend the output from this work – a report, 'Tackling HMRC's customer service challenge', making ten practical recommendations.

And in March, James Murray, the Exchequer Secretary to the Treasury, told us that he would be introducing an escalation route for agents for slow moving Self Assessment and PAYE queries – something that directly addressed one of our report's recommendations.

Fourth, 'Raising Standards in the tax market' continues as an important strand of our work in response to HMRC concerns about standards and the tax gap. This time last year, we responded to HMRC's consultation. We have since had the Budget announcement that agents will need to register with HMRC; and further consultation is expected imminently.

Professionalism

So there's been a lot going on. Being so actively involved in Institute activities over the last year reminds me not only of the range of functions and activities we carry out but also just how important our professional bodies are.

The CIOT acts in the public interest, on all our behalf, in:

- gathering our experience to inform tax policy making and to improve tax administration;
- maintaining our standards and the quality of our work, through CPD and our trusted qualifications;
- informing and educating the public about tax, including the work of LITRG; and
- in short, 'keeping our badge shiny'.

Membership of the CIOT provides a great starting point for the skills and knowledge that advisers need. Our professional bodies are an important part of our professionalism – and it has been a huge privilege to be President of the CIOT. I thank each and every one of you for supporting our Institute.

Last but not least, let me hand the President’s badge to Nichola Ross Martin, who I have had the good fortune to work with on Council over the last few years. I’m delighted she is now to be our President. Nichola – over to you.

This speech has been abridged. The full speech can be read at: www.tax.org.uk/cb-outgoing