Package: obr (via r-universe)

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Title Access 'Office for Budget Responsibility' Data

Version 0.6.3

Description Provides clean, tidy access to data published by the 'Office for Budget Responsibility' ('OBR'), the UK's independent fiscal watchdog. Covers the Public Finances Databank (outturn for PSNB, PSND, receipts, and expenditure since 1946), the Historical Official Forecasts Database (every 'OBR' forecast since 2010), the Economic and Fiscal Outlook detailed forecast tables (five-year projections from the latest Budget), the monthly profiles for the public finances (the 'OBR' forecast apportioned across the months of the fiscal year), and the Welfare Trends Report (incapacity benefit spending and caseloads). All returned objects carry provenance metadata recording the source URL, publication vintage, retrieval time, and file fingerprint, so analyses can be audited and reproduced. Data is downloaded from the 'OBR' on first use and cached locally for subsequent calls. Data is sourced from the 'OBR' website <https://obr.uk>.

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`[.obr_tbl` *Subset an obr_tbl, preserving provenance*

Description

Standard data.frame subsetting drops the `obr_tbl` class. This method preserves it (and the provenance attributes) when the result is still a data.frame.

Usage

```
## S3 method for class 'obr_tbl'
x[...]
```

Arguments

`x`	An `obr_tbl`.
`...`	Subsetting arguments passed to `[.data.frame`].

Value

An `obr_tbl` if the subset is two-dimensional, otherwise the underlying vector.

`as.data.frame.obr_tbl` *Coerce an obr_tbl to a plain data.frame*

Description

Strips the provenance attributes and the `obr_tbl` class so the result interacts smoothly with packages that dispatch on `data.frame` directly.

Usage

```
## S3 method for class 'obr_tbl'
as.data.frame(x, ...)
```

Arguments

`x`	An `obr_tbl`.
`...`	Unused.

Value

A plain `data.frame` with no provenance.

clear_cache *Clear cached OBR files*

Description

Deletes all files downloaded and cached by the obr package. The next function call will re-download fresh data from the OBR website.

Usage

```
clear_cache()
```

Details

Files are cached in `tools::R_user_dir("obr", "cache")`, or the directory set with `options(obr.cache_dir = )`. Each edition of a publication is cached separately, and a cached file is used for 7 days before it is downloaded again; set `options(obr.cache_ttl = )` to a number of hours to change this. If a re-download fails, the expired copy is used with a warning.

Value

Invisibly returns `NULL`.

Examples

```
op <- options(obr.cache_dir = tempdir())
clear_cache()
options(op)
```

get_efo_economy *Get EFO economy projections*

Description

Downloads (and caches) the OBR *Economic and Fiscal Outlook* Detailed Forecast Tables - Economy file and returns quarterly economic projections for a chosen measure in tidy long format.

Usage

```
get_efo_economy(
  measure = c("inflation", "labour", "output_gap"),
  refresh = FALSE,
  vintage = NULL
)
```

Arguments

measure	Character. Which economy table to return. One of "inflation", "labour", or "output_gap". Defaults to "inflation".
refresh	Logical. If TRUE, re-download even if a cached copy exists. Defaults to FALSE.
vintage	Optional EFO vintage label such as "October 2024". If supplied, the function downloads the file for that specific EFO. If NULL (the default), the function uses any vintage set via obr_pin(), or falls back to the latest live EFO via the dynamic URL resolver.

Details

Data run from 2008 Q1 through the current forecast horizon. Use list_efo_economy_measures() to see all available measures.

Value

An obr_tbl with the standard v0.4.0 schema (columns: period, period_type, series, metric_type, value, unit):

period Calendar quarter, e.g. "2025Q1" (character)

period_type Always "quarter" for this function (character)

series Variable name, e.g. "CPI" (character)

metric_type One of "index", "yoy_pct", "pct", "level", classified from the series name. This is the v0.4.0 fix for the v0.3.x issue where, e.g., CPI Index values and CPI YoY values shared a single value column with no machine-readable distinction.

value Numeric value in units described by unit

unit One of "index", "pct", etc., paired with metric_type

See Also

Other EFO: get_efo_fiscal(), get_efo_table(), get_monthly_profiles(), list_efo_economy_measures(), obr_efo_catalogue()

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  inf <- get_efo_economy("inflation")
  inf[inf$series == "CPI", ]

  lab <- get_efo_economy("labour")

  # Compare CPI projections from two different EFOs
  inf_oct24 <- get_efo_economy("inflation", vintage = "October 2024")
  inf_mar26 <- get_efo_economy("inflation", vintage = "March 2026")
})
options(op)
```

`get_efo_fiscal` *Get EFO fiscal projections (net borrowing components)*

Description

Downloads (and caches) the OBR *Economic and Fiscal Outlook* Detailed Forecast Tables - Aggregates file and returns the components of net borrowing (Table 6.5) in tidy long format.

Usage

```
get_efo_fiscal(refresh = FALSE, vintage = NULL)
```

Arguments

`refresh`	Logical. If `TRUE`, re-download even if a cached copy exists. Defaults to `FALSE`.
`vintage`	Optional EFO vintage label such as `"October 2024"`. If supplied, the function downloads the file for that specific EFO. If `NULL` (the default), the function uses any vintage set via `obr_pin()`, or falls back to the latest live EFO via the dynamic URL resolver. See `obr_efo_vintages()` for the full list of supported vintages.

Details

Covers the five-year forecast horizon published at the most recent fiscal event. Key series include current receipts, current expenditure, depreciation, net investment, and net borrowing (PSNB). The exact vintage is recorded in the returned object's provenance attribute and visible in the printed header.

Value

An `obr_tbl` with the standard v0.4.0 schema (columns: `period`, `period_type`, `series`, `metric_type`, `value`, `unit`):

period Fiscal year being forecast, e.g. `"2025-26"` (character)

period_type Always `"fiscal_year"` for this function (character)

series Component name, e.g. `"Net borrowing"` (character)

metric_type Always `"level"` for this function (character)

value Projected value (numeric)

unit Always `"gbp_bn"` for this function (character)

See Also

Other EFO: `get_efo_economy()`, `get_efo_table()`, `get_monthly_profiles()`, `list_efo_economy_measures()`, `obr_efo_catalogue()`

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  efo <- get_efo_fiscal()
  efo[efo$series == "Net borrowing", ]
  obr_provenance(efo)$vintage

  # Pin to a specific EFO for reproducibility
  october_2024 <- get_efo_fiscal(vintage = "October 2024")
})
options(op)
```

---

get_efo_table *Get any EFO detailed-forecast table by id*

Description

Generic fetcher that takes an EFO table identifier (e.g. `"6.5"`, `"1.7"`, `"4.1"`) and returns the parsed contents in the standard v0.4.0 schema. Use `obr_efo_catalogue()` to discover which tables are available.

Usage

```
get_efo_table(table_id, vintage = NULL, refresh = FALSE)
```

Arguments

`table_id`	Character. The EFO table identifier, e.g. `"6.5"`, `"1.7"`, `"6.13"`. See `obr_efo_catalogue()` for the full list.
`vintage`	Optional EFO vintage label (e.g. `"October 2024"`). If `NULL`, uses any pin set via `obr_pin()` or falls back to the latest live EFO.
`refresh`	Logical. If `TRUE`, re-download even if a cached copy exists. Defaults to `FALSE`.

Details

Internally, this function looks up `table_id` in the catalogue, fetches the right workbook (Aggregates or Economy), dispatches to a layout- specific parser, and tags every row with `metric_type` and `unit` according to the catalogue's defaults plus per-row classification.

Coverage today: 17 fiscal Aggregates tables + 22 macro Economy tables. Two of the Aggregates sheets, 6.11 (net debt year-on-year changes) and 6.15 (reconciliation of PSNCR and CGNCR), hold no data, only a pointer to a table in the EFO report; for these `get_efo_table()` returns `NULL` with a warning that quotes the pointer.

Headline functions `get_efo_fiscal()` and `get_efo_economy()` are kept as thin wrappers over this dispatcher.

Value

An `obr_tbl` with the standard v0.4.0 schema columns (`period`, `period_type`, `series`, `metric_type`, `value`, `unit`). Returns `NULL` (with a warning) for cross-reference sheets.

See Also

Other EFO: `get_efo_economy()`, `get_efo_fiscal()`, `get_monthly_profiles()`, `list_efo_economy_measures()`, `obr_efo_catalogue()`

Examples

```
op <- options(obr.cache_dir = tempdir())
try({

  # Net borrowing components (same data as get_efo_fiscal())
  get_efo_table("6.5")

  # CPI category inflation by year
  get_efo_table("1.19")

  # Composition of public sector net debt
  get_efo_table("6.13")

  # Pin to a specific vintage
  get_efo_table("6.5", vintage = "October 2024")
})
options(op)
```

---

get_expenditure *Get Total Managed Expenditure*

Description

Downloads (and caches) the OBR Public Finances Databank and returns annual Total Managed Expenditure (TME) in £ billion. TME is the broadest measure of UK government spending.

Usage

```
get_expenditure(refresh = FALSE)
```

Arguments

`refresh`	Logical. If `TRUE`, re-download even if a cached copy exists. Defaults to `FALSE`.

Value

An `obr_tbl` with the standard v0.4.0 schema. `series` is `"TME"`, `metric_type` is `"level"`, `unit` is `"gbp_bn"`. See `get_public_finances()` for column definitions.

See Also

Other public finances: `get_psnb()`, `get_psnd()`, `get_public_finances()`, `get_receipts()`

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  tme <- get_expenditure()
  tail(tme)
})
options(op)
```

`get_forecast_revisions`

Get OBR forecast revisions

Description

Downloads (and caches) the OBR Forecast Revisions Database, which decomposes each EFO-to-EFO revision in the headline Public Sector Net Borrowing forecast into three top-level components - policy, classifications and one-offs, and underlying (economic determinants) - with sub-components for each.

Usage

```
get_forecast_revisions(unit = c("gbp_bn", "pct_gdp"), refresh = FALSE)
```

Arguments

`unit`	Character. Either `"gbp_bn"` (GBP billion, the default) or `"pct_gdp"` (per cent of GDP).
`refresh`	Logical. If `TRUE`, re-download even if a cached copy exists. Defaults to `FALSE`.

Details

This is the dataset behind the "what changed?" attribution charts in OBR fiscal commentary and IFS Green Budget chapters.

Value

An `obr_tbl` with columns:

forecast_date Forecast vintage, e.g. `"November 2024"` (character).

component Revision component. Top-level rows are `"Total"`, `"Policy"`, `"Classifications and one-offs"`, and `"Underlying"`. Sub-components carry the OBR's `"of which: ..."` labels (character).

fiscal_year Fiscal year being revised, e.g. `"2024-25"` (character).

value Revision value, in GBP billion or per cent of GDP per `unit` (numeric). A positive value indicates an upward revision to PSNB.

See Also

Other forecasts: `get_forecasts()`, `list_forecast_series()`, `obr_actual_vs_forecast()`, `obr_compare_vintages()`, `obr_forecast_panel()`

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  rev <- get_forecast_revisions()
  # Top-level revisions only
  rev[rev$component %in% c("Total", "Policy",
  "Classifications and one-offs", "Underlying"), ]
})
options(op)
```

---

get_forecasts *Get OBR forecast history for a fiscal series*

Description

Downloads (and caches) the OBR Historical Official Forecasts Database and returns a tidy long-format data frame showing every forecast the OBR has ever published for a given series. Each row is one forecast for one fiscal year, made at one fiscal event.

Usage

```
get_forecasts(series = "PSNB", refresh = FALSE)
```

Arguments

`series`	Character. The series to return. Use `list_forecast_series()` to see all options. Defaults to `"PSNB"` (Public Sector Net Borrowing in £ billion).
`refresh`	Logical. If `TRUE`, re-download even if a cached copy exists. Defaults to `FALSE`.

Details

This is useful for visualising how OBR forecasts have evolved over time, and for comparing forecasts against outturns. The vintage of the underlying database is recorded in the returned object's provenance.

Value

An `obr_tbl` with the standard v0.4.0 schema plus a `forecast_date` column (so each row identifies one fiscal-year value at one fiscal event):

forecast_date When the forecast was published, e.g. `"March 2024"`

period Fiscal year being forecast, e.g. `"2024-25"`

period_type Always `"fiscal_year"`

series Series name as supplied (character)

metric_type One of `"level"`, `"pct"`, `"yoy_pct"`, set per series. CPI / GDP / real_GDP are `"yoy_pct"` (rates of change); PSNB / receipts / expenditure are `"level"`; the `_pct` variants and PSND are `"pct"` (% of GDP).

value Numeric forecast value in the unit described by `unit`

unit `"gbp_bn"` for level series, `"pct"` for percentage series

See Also

Other forecasts: `get_forecast_revisions()`, `list_forecast_series()`, `obr_actual_vs_forecast()`, `obr_compare_vintages()`, `obr_forecast_panel()`

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  get_forecasts("PSNB")

  psnb <- get_forecasts("PSNB")
  psnb[psnb$period == "2024-25", ]
})
options(op)
```

`get_incapacity_caseloads` *Get incapacity benefit caseloads*

Description

Downloads (and caches) the OBR Welfare Trends Report charts and tables workbook and returns the combined incapacity benefit caseload since 2008-09, in both absolute terms (thousands of claimants) and as a share of the working-age population.

Usage

```
get_incapacity_caseloads(refresh = FALSE)
```

Arguments

refresh	Logical. If TRUE, re-download even if a cached copy exists. Defaults to FALSE.

Value

An obr_tbl with the standard v0.4.0 schema. The two series ("Claimants" and "Share of working age population") carry different units: claimants are in thousands and the share is a percentage. After calling, the caller may want to overwrite unit to "count_k" for the claimants series, since the heuristic classifier cannot infer the "thousands" denomination from the series name alone.

See Also

Other welfare: get_incapacity_spending(), get_welfare_spending()

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  cases <- get_incapacity_caseloads()
  cases[cases$series == "Claimants", ]
})
options(op)
```

---

get_incapacity_spending

Get incapacity benefits spending by type

Description

Downloads (and caches) the OBR Welfare Trends Report charts and tables workbook and returns annual spending on each incapacity benefit as a share of GDP, from 1978-79 to 2028-29, from the October 2024 Welfare Trends Report (the OBR's most recent report on incapacity benefits).

Usage

```
get_incapacity_spending(refresh = FALSE)
```

Arguments

refresh	Logical. If TRUE, re-download even if a cached copy exists. Defaults to FALSE.

Details

Series include: Invalidity Benefit, Incapacity Benefit, Employment and Support Allowance (ESA), Sickness Benefit, and Severe Disablement Allowance.

Value

An `obr_tbl` with the standard v0.4.0 schema. `series` is the benefit name, values are spending as a percentage of GDP, `metric_type` is `"pct"`, `unit` is `"pct"`. See `get_public_finances()` for full column docs.

See Also

Other welfare: `get_incapacity_caseloads()`, `get_welfare_spending()`

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  ib <- get_incapacity_spending()
  unique(ib$series)
})
options(op)
```

---

get_monthly_profiles *Get the OBR monthly profiles for the public finances*

Description

Downloads (and caches) the monthly profiles workbook the OBR publishes alongside each *Economic and Fiscal Outlook*. The profiles apportion the full-year EFO forecast for receipts, spending, and the central government net cash requirement (CGNCR) across the twelve months of the fiscal year, so that each month's ONS/HMT public sector finances outturn can be judged against the path implied by the OBR's forecast.

Usage

```
get_monthly_profiles(
  sheet = c("profiles", "cgncr"),
  vintage = NULL,
  refresh = FALSE
)
```

Arguments

`sheet`	Which profile table to return. `"profiles"` (the default) returns the receipts and spending profiles; `"cgncr"` returns the central government net cash requirement breakdown.
`vintage`	Optional EFO vintage label such as `"March 2026"`. If `NULL` (the default), uses any pin set via `obr_pin()` or resolves the latest live profiles workbook.
`refresh`	Logical. If `TRUE`, re-download even if a cached copy exists. Defaults to `FALSE`.

Details

This is the reference point used every month in the run-up to a fiscal event ("borrowing so far this year vs the OBR profile"). The OBR itself publishes a monthly commentary against these profiles; this function provides the underlying numbers in tidy long format. Pair with monthly outturn data (e.g. from the ONS public sector finances release) to compute in-year deviations from profile.

The profiles workbook is typically published a few weeks after the EFO itself. The OBR describes the profiles as broad-brush and illustrative; see the Notes sheet of the source workbook.

Value

An `obr_tbl` with the standard schema columns (`period`, `period_type`, `series`, `metric_type`, `value`, `unit`). Monthly rows have `period_type = "month"` and `period` in `"YYYY-MM"` format; each series also carries one `period_type = "fiscal_year"` row holding the full-year EFO forecast the profile sums to. All values are GBP billion.

See Also

Other EFO: `get_efo_economy()`, `get_efo_fiscal()`, `get_efo_table()`, `list_efo_economy_measures()`, `obr_efo_catalogue()`

Examples

```
op <- options(obr.cache_dir = tempdir())

mp <- tryCatch(get_monthly_profiles(), error = function(e) NULL)
if (!is.null(mp)) {
  # Monthly profile for HMRC cash receipts
  mp[mp$series == "HMRC cash receipts" & mp$period_type == "month", ]
}

# CGNCR breakdown by month
cg <- tryCatch(get_monthly_profiles("cgncr"), error = function(e) NULL)

options(op)
```

`get_pension_projections` *Get long-run state pension spending projections (deprecated)*

Description

Deprecated since obr 0.5.1.

In July 2026 the OBR restructured the Fiscal Risks and Sustainability Report workbook set. The executive-summary sheet this function read (`C1.2`, state pension spending split into demographic and triple-lock scenarios) no longer exists, so the function could no longer return data.

The equivalent series is now published in the FSR Chapter 3 "Long-term spending projections" workbook, as Chart 3.11 "State pension spending under alternative uprating assumptions", with a different scenario structure (triple-lock, CPI, and average-earnings uprating rather than the old demographic vs triple-lock split). See https://obr.uk/frs/fiscal-risks-and-sustainability-july-2026/.

This stub is retained so existing scripts do not error. It emits a deprecation warning and returns `NULL`. It will be removed in a future release.

Usage

```
get_pension_projections(refresh = FALSE)
```

Arguments

`refresh`	Ignored. Retained so existing calls do not error.

Value

`NULL`, invisibly.

Examples

```
# Deprecated since 0.5.1: emits a warning and returns NULL.
suppressWarnings(get_pension_projections())
```

`get_policy_measures` *Get OBR policy measures by fiscal event*

Description

Downloads (and caches) the OBR Policy Measures Database, a single workbook that lists every tax or spending measure scored at a UK fiscal event, with the Exchequer effect in GBP million for each year of the forecast horizon. Tax measures cover 1970 to date; spending measures cover 2010 to date.

Usage

```
get_policy_measures(
  type = c("tax", "spending"),
  search = NULL,
  since = NULL,
  refresh = FALSE
)
```

Arguments

type	Character vector. Which measures to return: "tax", "spending", or both (the default).
search	Optional character. A regular expression used to filter measure and head (case-insensitive). For example, search = "alcohol" keeps any measure whose description or head mentions alcohol.
since	Optional fiscal-year cut-off (e.g. "2020-21"). Rows whose fiscal_year is earlier are dropped.
refresh	Logical. If TRUE, re-download even if a cached copy exists. Defaults to FALSE.

Details

This is the only programmatic access to the PMD: the OBR otherwise distributes it as a single Excel file.

Value

An obr_tbl with columns:

event Fiscal event that scored the measure, e.g. "Budget 2024" (character)

measure Plain-English description of the measure (character)

head Tax head (for tax measures) or spending head (character)

fiscal_year Fiscal year being scored, e.g. "2024-25" (character)

value_mn Exchequer effect in GBP million. For tax measures, a positive value raises revenue; for spending measures, a positive value increases spending (numeric)

See Also

Other policy measures: policy_measures_summary()

Examples

```
op <- options(obr.cache_dir = tempdir())

# The OBR CDN occasionally rate-limits or returns 403 to repeated
# requests. tryCatch so the example degrades gracefully if that happens
# during the CRAN check.
oct24 <- tryCatch(get_policy_measures(),
                  error = function(e) NULL)
if (!is.null(oct24)) {
  head(oct24[grepl("2024", oct24$event) &
             oct24$fiscal_year == "2025-26", ])

  # All alcohol-duty measures since 2010
  tryCatch(
    get_policy_measures(type = "tax", search = "alcohol",
                        since = "2010-11"),
    error = function(e) NULL
```

```
  )
}

options(op)
```

`get_psnb` *Get Public Sector Net Borrowing (PSNB)*

Description

Downloads (and caches) the OBR Public Finances Databank and returns annual Public Sector Net Borrowing in £ billion. A positive value means the government is borrowing (deficit); a negative value means a surplus.

Usage

```
get_psnb(refresh = FALSE)
```

Arguments

`refresh`	Logical. If `TRUE`, re-download even if a cached copy exists. Defaults to `FALSE`.

Value

An `obr_tbl` with the standard v0.4.0 schema. `series` is `"PSNB"`, `metric_type` is `"level"`, `unit` is `"gbp_bn"`. See `get_public_finances()` for column definitions.

See Also

Other public finances: `get_expenditure()`, `get_psnd()`, `get_public_finances()`, `get_receipts()`

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  psnb <- get_psnb()
  tail(psnb)
})
options(op)
```

get_psnd *Get Public Sector Net Debt (PSND)*

Description

Downloads (and caches) the OBR Public Finances Databank and returns annual Public Sector Net Debt in £ billion.

Usage

```
get_psnd(refresh = FALSE)
```

Arguments

refresh	Logical. If TRUE, re-download even if a cached copy exists. Defaults to FALSE.

Value

An obr_tbl with the standard v0.4.0 schema. series is "PSND", metric_type is "level", unit is "gbp_bn". See get_public_finances() for column definitions.

See Also

Other public finances: get_expenditure(), get_psnb(), get_public_finances(), get_receipts()

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  psnd <- get_psnd()
  tail(psnd)
})
options(op)
```

get_public_finances *Get all Public Finances Databank aggregates*

Description

Downloads (and caches) the OBR Public Finances Databank and returns all aggregate fiscal series in tidy long format. Covers outturn from 1946-47 and OBR projections through the current forecast horizon.

Usage

```
get_public_finances(refresh = FALSE)
```

Arguments

refresh	Logical. If TRUE, re-download even if a cached copy exists. Defaults to FALSE.

Details

Series include: Public sector net borrowing, Public sector net debt, Total managed expenditure, Public sector current receipts, Nominal GDP, GDP deflator, and more.

Value

An obr_tbl (a data.frame with attached provenance) with the standard v0.4.0 schema (columns: period, period_type, series, metric_type, value, unit):

period Fiscal year (character, e.g. "2024-25")

period_type Always "fiscal_year" for this function

series Series name (character)

metric_type Usually "level"; ratio or index series get a more specific value derived from the series name

value Numeric value in units described by unit

unit Usually "gbp_bn"; ratios and indices override

Use obr_provenance() to extract source URL, vintage, and retrieval time.

See Also

Other public finances: get_expenditure(), get_psnb(), get_psnd(), get_receipts()

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  pf <- get_public_finances()
  unique(pf$series)
  obr_provenance(pf)
})
options(op)
```

get_receipts *Get public sector receipts by tax type*

Description

Downloads (and caches) the OBR Public Finances Databank and returns public sector current receipts broken down by individual tax type, in tidy long format. Coverage begins in 1999-00.

Usage

```
get_receipts(refresh = FALSE)
```

Arguments

refresh	Logical. If TRUE, re-download even if a cached copy exists. Defaults to FALSE.

Value

An obr_tbl with the standard v0.4.0 schema (columns: period, period_type, series, metric_type, value, unit). series is the tax or receipt category, metric_type is "level", unit is "gbp_bn". See get_public_finances() for full column docs.

See Also

Other public finances: get_expenditure(), get_psnb(), get_psnd(), get_public_finances()

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  receipts <- get_receipts()
  receipts[grepl("income tax", receipts$series, ignore.case = TRUE), ]
})
options(op)
```

get_welfare_spending *Get working-age welfare spending*

Description

Downloads (and caches) the OBR Welfare Trends Report charts and tables workbook and returns annual working-age welfare spending as a share of GDP, split into incapacity-related and non-incapacity spending.

Usage

```
get_welfare_spending(refresh = FALSE)
```

Arguments

refresh	Logical. If TRUE, re-download even if a cached copy exists. Defaults to FALSE.

Details

Data cover fiscal years from 1978-79 to 2028-29, from the October 2024 Welfare Trends Report, the OBR's most recent report on incapacity benefits. Later reports cover other themes and do not update this chart.

Value

An obr_tbl with the standard v0.4.0 schema (columns: period, period_type, series, metric_type, value, unit). Values are spending as a percentage of GDP; metric_type is "pct", unit is "pct".

See Also

Other welfare: get_incapacity_caseloads(), get_incapacity_spending()

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  welfare <- get_welfare_spending()
  welfare[welfare$series == "Working-age incapacity benefits spending" &
  welfare$period >= "2000-01", ]
})
options(op)
```

---

list_efo_economy_measures

List available EFO economy measures

Description

Returns a data frame of the economy measures available via get_efo_economy(), showing the measure name to pass and a short description of what each covers.

Usage

```
list_efo_economy_measures()
```

Value

A data frame with columns `measure`, `sheet`, and `description`.

See Also

Other EFO: `get_efo_economy()`, `get_efo_fiscal()`, `get_efo_table()`, `get_monthly_profiles()`, `obr_efo_catalogue()`

Examples

```
list_efo_economy_measures()
```

---

list_forecast_series *List available forecast series*

Description

Returns a data frame showing the series names accepted by `get_forecasts()`, the corresponding Excel sheet in the OBR Historical Official Forecasts Database, and a plain-English description.

Usage

```
list_forecast_series()
```

Value

A data frame with columns `series`, `sheet`, and `description`.

See Also

Other forecasts: `get_forecast_revisions()`, `get_forecasts()`, `obr_actual_vs_forecast()`, `obr_compare_vintages()`, `obr_forecast_panel()`

Examples

```
list_forecast_series()
```

obr_actual_vs_forecast *Pair OBR forecasts with PFD outturn*

Description

Joins the long-format Historical Forecasts Database for a given series against the Public Finances Databank outturn for the same series. Returns one row per (forecast vintage, fiscal year) where both an OBR forecast value and an ONS outturn value exist, with the forecast error (`value_forecast - value_actual`) computed.

Usage

```
obr_actual_vs_forecast(
  series = c("PSNB", "PSND", "expenditure"),
  refresh = FALSE
)
```

Arguments

`series`	Forecast series. One of `"PSNB"`, `"PSND"`, `"expenditure"`. Defaults to `"PSNB"`.
`refresh`	Logical. If `TRUE`, re-download underlying files.

Details

Useful for forecast-evaluation studies, similar in shape to the OBR's own Forecast Evaluation Report decomposition.

Currently supports series for which a clean gbp_bn outturn function exists in this package: `"PSNB"`, `"PSND"`, `"expenditure"`. Other series (CPI, GDP, percentages of GDP) need outturn from external packages and will error.

Value

An `obr_tbl` with columns `forecast_date`, `period` (fiscal year being forecast), `period_type`, `series`, `unit`, `value_forecast` (from HFD), `value_actual` (from PFD outturn), and `error` (`value_forecast - value_actual`). Provenance points at the HFD; the PFD source URL is recorded in `notes`.

See Also

Other forecasts: `get_forecast_revisions()`, `get_forecasts()`, `list_forecast_series()`, `obr_compare_vintages()`, `obr_forecast_panel()`

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  eval <- obr_actual_vs_forecast("PSNB")

  # 1-year-ahead forecast errors only:
  # take the forecast vintage closest to the start of each fiscal year
  eval2425 <- eval[eval$period == "2024-25", ]
  eval2425[order(eval2425$forecast_date), ]
})
options(op)
```

`obr_as_of` *Find the OBR publication that was current on a given date*

Description

Returns the most recent EFO that had been published on or before `date`. Useful for reproducing analyses as they would have looked at a given point in time, before subsequent forecast revisions.

Usage

```
obr_as_of(date, publication = "EFO")
```

Arguments

`date`	A Date, or anything coercible to one (e.g. `"2024-11-15"`).
`publication`	Currently only `"EFO"` is supported.

Value

A length-one character vector containing the vintage label, e.g. `"October 2024"`.

See Also

Other vintage: `obr_efo_vintages()`, `obr_pin()`, `obr_pinned()`, `obr_unpin()`

Examples

```
obr_as_of("2024-11-15")
obr_as_of(Sys.Date())
```

`obr_compare_vintages` *Compare two EFO vintages*

Description

Pulls the same EFO table from two vintages and returns a tidy diff with a revision column (`value_b - value_a`). Useful for quantifying how the OBR's view changed between fiscal events.

Usage

```
obr_compare_vintages(vintage_a, vintage_b, what = "fiscal", refresh = FALSE)
```

Arguments

`vintage_a, vintage_b`	EFO vintage labels (e.g. `"October 2024"`, `"March 2026"`). Use `obr_efo_vintages()` to see all valid labels.
`what`	Which EFO table to compare. Either one of the named shortcuts `"fiscal"` (Table 6.5, the default), `"inflation"` (sheet 1.7), `"labour"` (sheet 1.6), `"output_gap"` (sheet 1.14), or any table id from `obr_efo_catalogue()` (e.g. `"6.13"`, `"1.19"`), so all detailed-forecast tables can be diffed across vintages.
`refresh`	Logical. If `TRUE`, re-download even if cached files exist. Defaults to `FALSE`.

Details

Rows are the **inner join** of the two vintages on the schema keys (`period`, `period_type`, `series`, `metric_type`, `unit`). Periods or series that are present in only one vintage are silently dropped. If you need to see what was added or removed between vintages, compare `obr_efo_vintages()` row counts or call the underlying functions directly with each vintage and `setdiff()` on the keys.

Calling the function with `vintage_a == vintage_b` is allowed and returns an all-zero `revision` column. There is no special handling beyond that.

Value

An `obr_tbl` with the standard v0.4.0 schema columns (`period`, `period_type`, `series`, `metric_type`, `unit`) plus `value_a`, `value_b`, and `revision` (`value_b - value_a`). Provenance points at the second vintage; the first vintage URL is recorded in the `notes` field.

See Also

Other forecasts: `get_forecast_revisions()`, `get_forecasts()`, `list_forecast_series()`, `obr_actual_vs_forecast`
`obr_forecast_panel()`

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  diff <- obr_compare_vintages("October 2024", "March 2026")
  diff[diff$series == "Net borrowing", ]

  # Compare the inflation forecast across two vintages
  inf_diff <- obr_compare_vintages("October 2024", "March 2026",
  what = "inflation")

  # Any catalogue table works too, e.g. debt interest (Table 6.16)
  di_diff <- obr_compare_vintages("November 2025", "March 2026",
  what = "6.16")
})
options(op)
```

`obr_efo_catalogue` *List the EFO detailed-forecast tables this package can fetch*

Description

Returns a data frame describing every Detailed Forecast Table in the OBR Economic and Fiscal Outlook (Aggregates and Economy workbooks) that `get_efo_table()` knows how to parse.

Usage

```
obr_efo_catalogue()
```

Details

Use this catalogue to discover which tables are available, what each contains, and the default `metric_type` / `unit` `get_efo_table()` will attach. Pass any `table_id` to `get_efo_table()`.

Coverage: 17 fiscal aggregates tables (Section 6) plus 22 macro economy tables (Section 1). Two sheets (6.11 and 6.15) hold only a pointer to a table in the EFO report, so `get_efo_table()` returns `NULL` with a warning rather than data for them.

Value

A data frame with columns:

table_id The EFO table identifier (e.g. `"6.5"`, `"1.7"`).

file Which EFO workbook the table sits in: `"aggregates"` or `"economy"`.

section Theme tag (e.g. `"GDP"`, `"Labour"`, `"Debt"`).

title Human-readable title taken from the OBR contents page.

layout Layout family the parser uses: `"quarterly_wide"`, `"quarterly_single"`, `"annual_year_wide"`, `"fiscal_year_wide"`, or `"cross_reference"`.

default_metric_type Default `metric_type` applied to series whose name does not signal otherwise. `NA` lets the heuristic decide per row.

default_unit Default `unit` for the same.

See Also

Other EFO: `get_efo_economy()`, `get_efo_fiscal()`, `get_efo_table()`, `get_monthly_profiles()`, `list_efo_economy_measures()`

Examples

```
head(obr_efo_catalogue())

# All tables in the Debt section
cat <- obr_efo_catalogue()
cat[cat$section == "Debt", c("table_id", "title")]
```

---

obr_efo_vintages *List known OBR Economic and Fiscal Outlook vintages*

Description

Returns a data frame of every EFO published since the OBR was created in June 2010, with publication dates and the URL slug used in the OBR's download links. Use this to look up which vintages can be pinned via `obr_pin()` or passed to `vintage =` arguments on `get_efo_fiscal()` and `get_efo_economy()`.

Usage

```
obr_efo_vintages()
```

Value

A data frame with columns:

publication Always `"EFO"`.

vintage Vintage label, e.g. `"March 2026"`.

date Publication date of the EFO (Date).

slug URL slug used by the OBR for that vintage's download pages.

See Also

Other vintage: `obr_as_of()`, `obr_pin()`, `obr_pinned()`, `obr_unpin()`

Examples

```
head(obr_efo_vintages())
tail(obr_efo_vintages(), 5)
```

`obr_fiscal_rules` *Get the current UK fiscal rules*

Description

Returns a data frame describing the Charter for Budget Responsibility fiscal rules currently in force, as encoded in the package at the time of release. Numerical headroom against each rule is *not* shipped as a constant because it is updated at every fiscal event and would go stale within months; use `obr_headroom()` to derive the stability-rule margin from the current EFO, or consult the OBR's EFO press release for the relevant vintage.

Usage

```
obr_fiscal_rules()
```

Details

The current Charter (Autumn 2024, with an Autumn 2025 update) sets three numerical rules:

- **Stability rule**: current budget in balance or surplus by the target year. The target year is the 5th forecast year and rolls to the 3rd forecast year from 2026-27 onwards.
- **Investment rule**: Public Sector Net Financial Liabilities (PSNFL) as a share of GDP falling year-on-year by the target year.
- **Welfare cap**: AME-capped welfare spending below the statutory cap level by the target year.

The Budget Responsibility Act 2024 also adds a non-numerical **fiscal lock** requiring an OBR forecast for any fiscally significant measure.

Value

A data frame with columns:

rule Short rule code: `"stability"`, `"investment"`, `"welfare_cap"`.

metric The metric the rule binds on.

target_description Plain-English target.

target_year_rule How the target year is set under the Charter.

direction_of_pass Sign convention for headroom.

source_charter Charter version that defines the rule.

source_act Act of Parliament backing the rule.

See Also

Other fiscal rules: obr_headroom()

Examples

```
obr_fiscal_rules()
```

---

obr_forecast_panel *Build a wide real-time panel of OBR forecasts*

Description

Takes the long-format Historical Forecasts Database output of get_forecasts() and pivots it to a wide panel with one row per forecast vintage (e.g. "March 2024") and one column per fiscal year being forecast (e.g. "2024-25"). The first column is the forecast vintage; remaining columns are numeric forecast values.

Usage

```
obr_forecast_panel(
  series = "PSNB",
  refresh = FALSE,
  order_chronologically = TRUE
)
```

Arguments

series	Character. Series to return; see list_forecast_series(). Defaults to "PSNB".
refresh	Logical. If TRUE, re-download the underlying database.
order_chronologically	Logical. If TRUE (the default), rows are ordered from earliest to latest forecast vintage. If FALSE, rows appear in the order returned by get_forecasts().

Details

This format mirrors how the OBR's own Historical Forecasts Database is laid out and how forecast-error studies (e.g. the OBR's own Forecast Evaluation Report) decompose performance: each row is one forecast published at a fiscal event, each column is the target year being forecast, and the diagonal-like structure lets you read the h-step ahead forecast for any vintage.

Value

An obr_tbl whose first column (forecast_date) is character and whose remaining columns are numeric forecast values, one per fiscal year. Provenance is inherited from the underlying call to get_forecasts() and a notes field describes the panel.

See Also

Other forecasts: get_forecast_revisions(), get_forecasts(), list_forecast_series(), obr_actual_vs_forecast
obr_compare_vintages()

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  panel <- obr_forecast_panel("PSNB")
  # PSNB forecast for 2024-25 across every vintage
  panel[, c("forecast_date", "2024-25")]
})
options(op)
```

---

obr_headroom *Compute the stability-rule margin from the EFO forecast*

Description

Returns the current budget surplus for every year of an EFO forecast, derived from Table 6.5 (Components of net borrowing). Under the Charter for Budget Responsibility's stability rule the current budget must be in balance or surplus by the target year, so the value in the target year is the margin, or "headroom", against the rule: positive means the rule is met with room to spare, negative means it is missed.

Usage

```
obr_headroom(vintage = NULL, target_year = NULL, refresh = FALSE)
```

Arguments

vintage	Optional EFO vintage label such as "March 2026". If NULL (the default), uses any pin set via obr_pin() or the latest live EFO.
target_year	Optional fiscal-year string (e.g. "2029-30"). If supplied, an is_target_year column flags that year.
refresh	Logical. If TRUE, re-download even if a cached copy exists. Defaults to FALSE.

Details

The value returned is -1 * the published "Current budget deficit" series, i.e. a surplus is positive. Pass target_year to flag the year the rule currently bites on; the function does not guess it, because the Charter's target-year convention changes over time (see obr_fiscal_rules() for the rules as encoded at release).

Note the OBR's own published headroom figure at a fiscal event can differ slightly from the Table 6.5 arithmetic (rounding, and any rule-specific adjustments described in the EFO text). Treat this as the published forecast path for the rule metric, not a reproduction of the OBR's press-notice headroom number.

Value

An `obr_tbl` with the standard schema columns (`period`, `period_type`, `series`, `metric_type`, `value`, `unit`), where `series` is `"Current budget surplus"` and `value` is in GBP billion (positive = surplus = headroom under the stability rule). If `target_year` is supplied, an additional logical `is_target_year` column is included.

See Also

Other fiscal rules: `obr_fiscal_rules()`

Examples

```
op <- options(obr.cache_dir = tempdir())

hr <- tryCatch(obr_headroom(), error = function(e) NULL)
if (!is.null(hr)) hr

# Flag the target year and read off the margin
hr <- tryCatch(obr_headroom(target_year = "2029-30"),
               error = function(e) NULL)
if (!is.null(hr)) hr[hr$is_target_year, ]

options(op)
```

`obr_pin` *Pin a session-wide OBR EFO vintage*

Description

Sets the EFO vintage that `get_efo_fiscal()` and `get_efo_economy()` will use when called without an explicit `vintage =` argument. The pin is stored as the option `obr.efo_vintage` and lasts for the R session unless overwritten or removed via `obr_unpin()`.

Usage

```
obr_pin(vintage = NULL)
```

Arguments

`vintage`	Vintage label such as `"October 2024"`. See `obr_efo_vintages()` for the full list. A well-formed label that is not yet in the package's EFO calendar (e.g. a brand-new EFO published after this package version was released) is accepted with a warning: download URLs are then constructed from the OBR's slug convention, so a new EFO can be pinned on publication day. If `NULL`, this function clears the pin (equivalent to calling `obr_unpin()`).

Value

Invisibly returns the pinned vintage string, or NULL after clearing.

See Also

Other vintage: obr_as_of(), obr_efo_vintages(), obr_pinned(), obr_unpin()

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  obr_pin("October 2024")
  obr_pinned()
  obr_unpin()
})
options(op)
```

---

obr_pinned *Show the currently pinned OBR EFO vintage*

Description

Returns the vintage string currently active via obr_pin(), or NULL if no pin is set.

Usage

```
obr_pinned()
```

Value

Either a length-one character vector or NULL.

See Also

Other vintage: obr_as_of(), obr_efo_vintages(), obr_pin(), obr_unpin()

Examples

```
obr_pinned()
```

obr_provenance *Extract OBR provenance metadata*

Description

Returns the provenance list attached to an obr_tbl: the OBR publication it came from, the publication vintage, the source URL, retrieval time, file fingerprint, and package version.

Usage

```
obr_provenance(x)
```

Arguments

x	An obr_tbl (or any object; returns NULL if none attached).

Value

A named list of provenance fields, or NULL if no provenance is attached. Fields:

publication Short code: "PFD", "HFD", "EFO", "WTR", "FSR", "PMD".

vintage Publication vintage label, e.g. "March 2026".

source_url Canonical OBR download URL the data came from.

retrieved POSIXct timestamp of when the file was downloaded or last validated in the cache.

file_md5 MD5 fingerprint of the underlying spreadsheet.

package_version obr package version that produced the object.

notes Optional free-text notes, or NULL.

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  psnb <- get_psnb()
  obr_provenance(psnb)
})
options(op)
```

obr_unpin *Clear the pinned OBR EFO vintage*

Description

Removes any pin set by `obr_pin()`. After unpinning, `get_efo_fiscal()` and `get_efo_economy()` revert to resolving the most recent live EFO via the dynamic URL resolver.

Usage

```
obr_unpin()
```

Value

Invisibly returns the previously pinned vintage (or `NULL` if no pin was set).

See Also

Other vintage: `obr_as_of()`, `obr_efo_vintages()`, `obr_pin()`, `obr_pinned()`

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  obr_pin("March 2025")
  obr_unpin()
})
options(op)
```

policy_measures_summary *Summarise policy measures by fiscal event*

Description

Aggregates the measures returned by `get_policy_measures()` to give the net Exchequer effect (positive = revenue-raising / spending-reducing for tax, spending-increasing for spending) by fiscal event and fiscal year.

Usage

```
policy_measures_summary(x)
```

Arguments

x	An obr_tbl returned by get_policy_measures().

Value

An obr_tbl with columns:

type "tax" or "spending"

event Fiscal event

fiscal_year Fiscal year

value_mn Sum of the Exchequer effect across all measures scored at that event, in GBP million

Provenance is preserved.

See Also

Other policy measures: get_policy_measures()

Examples

```
op <- options(obr.cache_dir = tempdir())
try({
  pm <- get_policy_measures(type = "tax", since = "2024-25")
  policy_measures_summary(pm)
})
options(op)
```

---

print.obr_tbl *Print an obr_tbl*

Description

Prints the data with a provenance header that names the OBR publication, vintage, source URL, retrieval time, and underlying file fingerprint.

Usage

```
## S3 method for class 'obr_tbl'
print(x, n = 10L, ...)
```

Arguments

x	An obr_tbl object.
n	Number of rows to display (default 10).
...	Further arguments passed to print.data.frame().

Value

The input, returned invisibly.

`summary.obr_tbl` *Summary of an obr_tbl*

Description

Returns the full provenance card and a structural summary of the data.

Usage

```
## S3 method for class 'obr_tbl'
summary(object, ...)
```

Arguments

`object`	An `obr_tbl` object.
`...`	Unused.

Value

Invisibly returns the provenance list.

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