Package: obr (via r-universe)

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Title Access 'Office for Budget Responsibility' Data

Version 0.5.0

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 Welfare Trends Report (incapacity benefit spending and caseloads), and the Fiscal Risks and Sustainability Report (50-year state pension projections). 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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Encoding UTF-8

Language en-GB

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https://github.com/charlescoverdale/obr

BugReports https://github.com/charlescoverdale/obr/issues

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Contents

`[.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()
```

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()`, `list_efo_economy_measures()`, `obr_efo_catalogue()`

Examples

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

Examples

```
op <- options(obr.cache_dir = tempdir())
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. One sheet (6.11 PSND year-on-year changes) is a cross-reference to a previous EFO and returns `NULL` with a warning rather than data; OBR itself directs users to the previous EFO for that table.

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()`, `list_efo_economy_measures()`, `obr_efo_catalogue()`

Examples

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

# 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())
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())
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())
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())
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 the current forecast horizon.

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())
ib <- get_incapacity_spending()
unique(ib$series)
options(op)
```

---

get_pension_projections

Get long-run state pension spending projections

Description

Downloads (and caches) the OBR Fiscal Risks and Sustainability Report executive summary charts and tables workbook and returns 50-year projections for state pension spending as a share of GDP, under alternative demographic and triple-lock uprating scenarios.

Usage

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

Arguments

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

Details

This data is unique to the Fiscal Risks and Sustainability Report and is not available in any other OBR publication. It illustrates how ageing demographics and pension uprating rules interact to determine the long-run cost of the state pension. The exact vintage is recorded in the returned object's provenance.

Value

An `obr_tbl` with the standard v0.4.0 schema plus a `scenario_type` column to group scenarios:

period Fiscal year, e.g. `"2030-31"` (character)

period_type Always `"fiscal_year"`

series Scenario name, e.g. `"Central projection"`, `"Higher life expectancy"` (character)

metric_type Always `"pct"`

value State pension spending as a percentage of GDP (numeric)

unit Always `"pct"`

scenario_type Either `"Demographic scenarios"` or `"Triple lock scenarios"` (character)

Examples

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

central <- proj[proj$scenario_type == "Demographic scenarios" &
                proj$series == "Central projection", ]
tail(central, 10)

dem <- proj[proj$scenario_type == "Demographic scenarios", ]
options(op)
```

`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())
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())
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())
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())
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 through the current forecast horizon. The exact vintage is recorded in the returned object's provenance.

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())
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()`, `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())
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 = c("fiscal", "inflation", "labour", "output_gap"),
  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. One of `"fiscal"` (Table 6.5 aggregates, the default), `"inflation"` (sheet 1.7), `"labour"` (sheet 1.6), or `"output_gap"` (sheet 1.14).
`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())
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")
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). One sheet (6.11) is currently a cross-reference to a previous EFO and returns `NULL` with a warning rather than data.

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()`, `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; users should derive headroom from the current EFO output of `get_efo_fiscal()`, 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.

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())
panel <- obr_forecast_panel("PSNB")
# PSNB forecast for 2024-25 across every vintage
panel[, c("forecast_date", "2024-25")]
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. 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())
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())
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())
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())
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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