

## REASONS FOR NOT PROVIDING INFORMATION

Part 1a) of your request: an exemption applies.

**An exemption under section 38(1)(b) of FOISA applies to the information you have requested.**  
**Section 38(1)(b) relates to personal data relating to a third party.** This exemption is not subject to the ‘public interest test’.

Part 1b) of your request: an exemption applies.

**An exemption under section 29(1)(d) of FOISA applies to the information you have requested.**  
**Section 29(1)(d) relates to the operation of any Ministerial private office.**

This exemption is subject to the ‘public interest test’. Therefore, taking account of all the circumstances of this case, we have considered if the public interest in disclosing the information outweighs the public interest in applying the exemption.

We have found that, on balance, the public interest lies in favour of upholding the exemption. The information within these documents is administrative only and is not of benefit to the public as it would not further inform the background of a Ministerial decision.

**An exemption under section 30(b)(i) applies to the information you have requested.**  
**Section 30(b)(i) relates to the free and frank provision of advice.**

This exemption is subject to the ‘public interest test’. Therefore, taking account of all the circumstances of this case, we have considered if the public interest in disclosing the information outweighs the public interest in applying the exemption.

We have found that, on balance, the public interest lies in favour of upholding the exemption. We recognise that there is some public interest in releasing advice to Scottish Ministers. However, this is outweighed by the public interest in Scottish Ministers receiving detailed advice from civil servants on sensitive topics to develop the most appropriate government position for Scotland.

**An exemption under section 38(1)(b) of FOISA applies to the information you have requested.**  
**Section 38(1)(b) relates to personal data relating to a third party.** This exemption is not subject to the ‘public interest test’.

Part 1c) of your request: an exemption applies.

**An exemption under section 30(b)(i) applies to the information you have requested.**  
**Section 30(b)(i) relates to the free and frank provision of advice.**

This exemption is subject to the ‘public interest test’. Therefore, taking account of all the circumstances of this case, we have considered if the public interest in disclosing the information outweighs the public interest in applying the exemption.

We have found that, on balance, the public interest lies in favour of upholding the exemption. We recognise that there is some public interest in releasing advice to Scottish Ministers. However, this is outweighed by the public interest in Scottish Ministers receiving detailed advice from civil servants on sensitive topics to develop the most appropriate government position for Scotland.

**An exemption under section 29(1)(a) applies to the information you have requested.**  
**Section 29(1)(a) relates to the formulation or development of Scottish Government policy.**

This exemption is subject to the ‘public interest test’. Therefore, taking account of all the circumstances of this case, we have considered if the public interest in disclosing the information outweighs the public interest in applying the exemption.

We have found that, on balance, the public interest lies in favour of upholding the exemption. We recognise that there is some public interest in releasing advice to Scottish Ministers. This is outweighed by the public interest in Scottish Ministers receiving detailed advice from civil servants to formulate Scottish Government policy.

**An exemption under section \* s.25(1) applies to the information you have requested. Section \* s.25(1) relates to information otherwise accessible.**

This exemption is subject to the ‘public interest test’. Therefore, taking account of all the circumstances of this case, we have considered if the public interest in disclosing the information outweighs the public interest in applying the exemption.

We have found that, on balance, the public interest lies in favour of upholding the exemption. The information is reasonably obtainable on the Scottish Government website and the link to this has been provided.

**An exemption under section 38(1)(b) of FOISA applies to the information you have requested. Section 38(1)(b) relates to personal data relating to a third party.** This exemption is not subject to the ‘public interest test’.

Part 1d) of your request: an exemption applies.

**An exemption under section 38(1)(b) of FOISA applies to the information you have requested. Section 38(1)(b) relates to personal data relating to a third party.** This exemption is not subject to the ‘public interest test’.

Part 1e) of your request: an exemption applies.

**An exemption under section 38(1)(b) of FOISA applies to the information you have requested. Section 38(1)(b) relates to personal data relating to a third party.** This exemption is not subject to the ‘public interest test’.

**An exemption under section 30(b)(i) applies to the information you have requested. Section 30(b)(i) relates to the free and frank provision of advice.**

This exemption is subject to the ‘public interest test’. Therefore, taking account of all the circumstances of this case, we have considered if the public interest in disclosing the information outweighs the public interest in applying the exemption.

We have found that, on balance, the public interest lies in favour of upholding the exemption. We recognise that there is some public interest in releasing advice to Scottish Ministers. This is outweighed by the public interest in Scottish Ministers receiving detailed advice from civil servants on sensitive topics and, as such, some information has been redacted under this exemption.

**An exemption under section 29(1)(a) applies to the information you have requested. Section 29(1)(a) relates to the formulation or development of Scottish Government policy.**

This exemption is subject to the ‘public interest test’. Therefore, taking account of all the circumstances of this case, we have considered if the public interest in disclosing the information outweighs the public interest in applying the exemption.

We have found that, on balance, the public interest lies in favour of upholding the exemption. We recognise that there is some public interest in releasing advice to Scottish Ministers. This is outweighed by the public interest in Scottish Ministers receiving detailed advice from civil servants to formulate Scottish Government policy.

**An exemption under section 29(1)(d) of FOISA applies to the information you have requested.  
Section 29(1)(d) relates to the operation of any Ministerial private office.**

This exemption is subject to the ‘public interest test’. Therefore, taking account of all the circumstances of this case, we have considered if the public interest in disclosing the information outweighs the public interest in applying the exemption.

We have found that, on balance, the public interest lies in favour of upholding the exemption. The information within these documents is administrative only and is not of benefit to the public as it would not further inform the background of a Ministerial decision.

**1A) COMPOSITE OF DOCUMENTS PROVIDED**

Document 1: Email – RE: 14:30 – 15:00 Meeting with Ross Greer MSP

**From:** Director of Budget and Public Spending [REDACTED]

**Sent:** 27 September 2022 09:00

**To:** Director of Tax and Revenues [REDACTED]

**Subject:** RE: 14:30 - 15:00 Meeting with Ross Greer MSP - Budget

Thanks [REDACTED]

I agree that it should be possible to reuse the briefing provided around the UK fiscal statement and [REDACTED] and [REDACTED] notes on tax

DFM is familiar with the issues and I think will have a clear idea about what he wishes to cover

He also received advice yesterday from [REDACTED] team on Budget 2022-23, but has an opportunity to discuss that beforehand with [REDACTED] and me

[REDACTED]

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[REDACTED] | Director of Budget and Public Spending | The Scottish Government

Victoria Quay Edinburgh EH6 6QQ | Tel: [REDACTED] | [REDACTED]

**From:** [REDACTED] **On Behalf Of** Director of Tax and Revenues

**Sent:** 27 September 2022 08:50

**To:** Director of Budget and Public Spending [REDACTED]; Director of Tax and Revenues [REDACTED]

**Subject:** RE: 14:30 - 15:00 Meeting with Ross Greer MSP - Budget

I note that PO is looking for briefing.

I know we provided something bespoke on revenue raising ideas for the last meeting – but is there a need to provide anything specific this time? Or point DFM to the briefings he's already had?

[REDACTED]

[REDACTED] | Head of Delivery, Coordination and Strategic Planning | Directorate for Tax and Revenues | Scottish Government | Tel: [REDACTED]

-----Original Appointment-----

**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery

**Sent:** 26 September 2022 19:12

**To:** 'Swinney J (John), MSP'; Director of Budget and Public Spending[REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; Director of Tax and Revenues; [REDACTED]; [REDACTED]

**Cc:** [REDACTED]

**Subject:** 14:30 - 15:00 Meeting with Ross Greer MSP - Budget

**When:** 27 September 2022 14:30-15:00 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

**Where:** DFM's Office, Parliament

Hi,

Confirming this engagement in DFM diary.

Please prepare briefing using the appropriate templates and guidance from [REDACTED] and send to Private Office.

If this engagement is with a **business or a business representative organisation** please include the Business Engagement Mailbox ([REDACTED]) in your distribution list for the briefing and readout to allow this information to be included in the monthly and quarterly reports to Ministers of their engagements with business.

**Official support is expected at all meetings and engagements unless otherwise agreed with Private Office.** Please note that there is a requirement for an official note of all meetings to be produced – this should be done by the most appropriate official supporting the Minister in line with published [REDACTED].

If diary timings do not match the event times you are providing in briefing then please flag this to Private Office immediately.

If there will be external stakeholders attending a Scottish Government building (not Parliament), please submit visitor forms as appropriate.

Please **do not** forward on this invite - if you require anyone else to be invited please let Private Office know.

Please call to discuss if you have any queries or are likely to miss the deadline.

Thank you very much,

DFM PO

Document 2: Email – RE: Meeting with Ross Greer MSP – Budget | Tuesday 27<sup>th</sup> September 14:30 – 15:00

**From:** Director of Budget and Public Spending [REDACTED]

**Sent:** 26 September 2022 20:01

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]; [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]

**Subject:** RE: Meeting with Ross Greer MSP - Budget | Tuesday 27th September 14:30 - 15:00

[REDACTED]

Thanks for checking and absolutely fine

[REDACTED]

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[REDACTED] | Director of Budget and Public Spending | The Scottish Government

Victoria Quay Edinburgh EH6 6QQ | Tel: [REDACTED] | [REDACTED]

**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery

**Sent:** 26 September 2022 19:12

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]; Director of Budget and Public Spending [REDACTED]; [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]

**Subject:** RE: Meeting with Ross Greer MSP - Budget | Tuesday 27th September 14:30 - 15:00

Hi [REDACTED],

DFM has asked if both you and Andrew S can join this meeting tomorrow, noting it's likely to stray across both tax and budgets. Grateful for confirmation you can both attend in person.

Thanks,

[REDACTED]

[REDACTED]

Deputy Private Secretary to Deputy First Minister and Cabinet Secretary for Covid Recovery – John Swinney

The Scottish Government | St Andrew's House, Regent Road, Edinburgh, EH1 3DG

M: [REDACTED] | T: [REDACTED] | E: [REDACTED]

All e-mails and attachments sent by a Ministerial Private Office to any other official on behalf of a Minister relating to a decision, request or comment made by a Minister, or a note of a Ministerial meeting, must be filed appropriately by the recipient. Private Offices do not keep official records of such e-mails or attachments.

Scottish Ministers, Special advisers and the Permanent Secretary are covered by the terms of the Lobbying (Scotland) Act 2016. See [www.lobbying.scot](http://www.lobbying.scot)

**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery

**Sent:** 26 September 2022 17:54

**To:** Director of Budget and Public Spending [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]; [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]

**Subject:** RE: Meeting with Ross Greer MSP - Budget | Tuesday 27th September 14:30 - 15:00

Hi [REDACTED]

Let me check and come back to you asap

Thanks

[REDACTED]

[REDACTED]

Private Secretary/DFM

[REDACTED]

**From:** Director of Budget and Public Spending [REDACTED]

**Sent:** 26 September 2022 16:23

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]; [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]

**Subject:** RE: Meeting with Ross Greer MSP - Budget | Tuesday 27th September 14:30 - 15:00

[REDACTED], [REDACTED], [REDACTED]

I wonder if this meeting might focus quite a bit on Tax policy and the implications of the UK Govt fiscal statement, and therefore whether it might be better to invite [REDACTED] or one of his team?

[REDACTED]

---

[REDACTED] | Director of Budget and Public Spending | The Scottish Government

Victoria Quay Edinburgh EH6 6QQ | Tel: [REDACTED] | [REDACTED]

**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery  
**Sent:** 26 September 2022 16:16  
**To:** Director of Budget and Public Spending [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]  
**Cc:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]  
**Subject:** Meeting with Ross Greer MSP - Budget | Tuesday 27th September 14:30 - 15:00

Good afternoon all,

DFM and Ross Greer will now be meeting tomorrow afternoon to discuss Budget at DFM's office in Parliament.

Grateful for confirmation of official support at this discussion and if any updated papers for this meeting can be sent on to Private Office.

Many thanks,

[REDACTED]  
Assistant Private Secretary (Diary) to the Deputy First Minister and Cabinet Secretary for Covid Recovery – John Swinney

The Scottish Government | St Andrew's House, Regent Road, Edinburgh, EH1 3DG

E: [REDACTED]



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-----Original Appointment-----

**From:** [REDACTED] On Behalf Of Deputy First Minister and Cabinet Secretary for Covid Recovery  
**Sent:** 26 September 2022 13:28  
**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery; 'Swinney J (John), MSP'; Director of Budget and Public Spending; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]  
**Subject:** 14:30 - 15:00 Meeting with Ross Greer MSP - Budget  
**When:** 27 September 2022 14:30-15:00 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.  
**Where:** DFM's Office, Parliament

Hi,

Confirming this engagement in DFM diary.

Please prepare briefing using the appropriate templates and guidance from [REDACTED] and send to Private Office.

If this engagement is with a **business or a business representative organisation** please include the Business Engagement Mailbox ([REDACTED]) in your distribution list for the briefing and readout to allow this information to be included in the monthly and quarterly reports to Ministers of their engagements with business.

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If diary timings do not match the event times you are providing in briefing then please flag this to Private Office immediately.

If there will be external stakeholders attending a Scottish Government building (not Parliament), please submit visitor forms as appropriate.

Please **do not** forward on this invite - if you require anyone else to be invited please let Private Office know.

Please call to discuss if you have any queries or are likely to miss the deadline.

Thank you very much,

DFM PO

**1B) COMPOSITE OF DOCUMENTS PROVIDED**

Document 3: Readout of meeting – Deputy First Minister meeting with Dame Ann Gloag and MySense

**Deputy First Minister meeting with Dame Ann Gloag and MySense**

**Wednesday 28 September 2022**

**Attendees**

- John Swinney, Deputy First Minister (DFM)
- Dame Ann Gloag, MySense Investor
- Lucie Glenday, Chief Executive Officer MySense
- John Fletcher, Chief Financial Officer MySense
- Pauline Bradley, Gloag Investment/Greyfairs Investment
- [REDACTED], DPS/DFM

**Discussion**

The Chief Executive of MySense provided an overview of MySense and the organisation history, referencing some of the pilots MySense has ran in collaboration with sites in Edinburgh and South Lanarkshire.

MySense officials stressed the role their product plays in assisting with targeting care to individual needs. The overview captured some of the positive findings their independently verified research has found whilst capturing some of the financial savings MySense believe their product could make to the Scottish Government.

DFM raised that philosophically the product that MySense provide sits well with goals the Scottish Government are trying to achieve and ties in with the integrated approach the Scottish Government are exploring in Health and Social Care.

DFM stated that with an aging population and the current struggles that the NHS are facing, pursuing an approach that promotes early intervention is favourable. DFM flagged the work being carried out under the Hospital at Home initiative stressing the important of supporting folk at home to help elevate some of the pressure the NHS is facing.

Dame Ann and the CEO of MySense referenced some of the work being carried out with the University of Warwick in which Digital Health Graduates are working with MySense to assist with deepening the understanding of how to utilise data led solutions. Dame Ann raised there would be scope to undertake a similar scheme in collaboration with the University of Stirling.

The meeting concluded with DFM offering to establish an open dialogue between the Cabinet Secretary for Health and Social Care and his officials with MySense. Private Office will be sharing a copy of this note with the Cabinet Secretary along with the briefing deck that MySense officials provided.

[REDACTED]

DPS/DFM

28 September 2022

Document 6: Email – RE: DFM Engagement with Dame Gloag 28/09/2022

**From:** [REDACTED]

**Sent:** 23 September 2022 17:12

**To:** [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]>;

[REDACTED]

**Cc:** Digital Health and Care Policy Hub <[REDACTED]>; [REDACTED] <[REDACTED]> [REDACTED]

**Subject:** RE: DFM Engagement with Dame Gloag 28/09/2022

Good afternoon

Please find attached the briefing, as well as the article and the briefing note from Dame Ann for the upcoming meeting on Wednesday.

Kind regards

[REDACTED]

**[REDACTED]Digital Health & Care Briefing Manager**

**Digital Health and Care**

**Scottish Government**

**Twitter: @TECScotland @DigiCare4Scot**

**From:** [REDACTED]

**Sent:** 23 September 2022 17:04

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED] [REDACTED];

[REDACTED]

**Cc:** Digital Health and Care Policy Hub [REDACTED]; [REDACTED] [REDACTED] [REDACTED]

**Subject:** RE: DFM Engagement with Dame Gloag 28/09/2022

Just coming from [REDACTED] now – we received additional material from Dame Gloag late this afternoon which has now been built into the overall pack, so the whole thing is now final. Note I may also join [REDACTED] as official support on the day, but I will confirm that early next week.

[REDACTED]

**Head of Strategy & Policy**

**Digital Health & Care**

**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery

**Sent:** 23 September 2022 17:00

**To:** [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** Digital Health and Care Policy Hub [REDACTED]>; [REDACTED] [REDACTED]; [REDACTED]

**Subject:** RE: DFM Engagement with Dame Gloag 28/09/2022

Colleagues,

Grateful if you could let PO know when we should be receiving the briefing for the engagement next week?

Thanks,

[REDACTED]

[REDACTED]

**Deputy Private Secretary to the Deputy First Minister and Cabinet Secretary for Covid Recovery –  
John Swinney MSP**

**The Scottish Government**

St Andrew's House | Regent Road | Edinburgh | EH1 3DG

**T:** [REDACTED] | **M:** [REDACTED] | **Email:** [REDACTED]

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**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery

**Sent:** 23 September 2022 08:41

**To:** [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** Digital Health and Care Policy Hub [REDACTED]>; [REDACTED] [REDACTED]; [REDACTED]

**Subject:** RE: DFM Engagement with Dame Gloag 28/09/2022

[REDACTED]

[REDACTED]

[REDACTED]

**Deputy Private Secretary to the Deputy First Minister and Cabinet Secretary for Covid Recovery –  
John Swinney MSP**

**The Scottish Government**

St Andrew's House | Regent Road | Edinburgh | EH1 3DG

**T: [REDACTED] | M: [REDACTED] | Email: [REDACTED]**

**From:** [REDACTED]

**Sent:** 22 September 2022 17:27

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery <[REDACTED]

**Cc:** Digital Health and Care Policy Hub [REDACTED]; [REDACTED]; [REDACTED]< [REDACTED];  
[REDACTED] [REDACTED]

**Subject:** DFM Engagement with Dame Gloag 28/09/2022

Deputy First Minister,

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Kind regards

[REDACTED]

[REDACTED]

**From:** [REDACTED]  
**Sent:** 21 September 2022 13:50  
**To:** [REDACTED]  
**Cc:** [REDACTED]  
**Subject:** RE: PLEASE READ - Meeting with Dame Ann Gloag and Deputy First Minister on 28 September 2022 - Time change

Thanks, [REDACTED].

Can confirm that as of now [REDACTED] will be accompanying the DFM. If there are any changes to this we will let you know as soon as possible.

Kind regards

[REDACTED]

[REDACTED]

**Digital Health & Care Briefing Manager**  
**Digital Health and Care**  
**Scottish Government**  
**Twitter: @TECScotland @DigiCare4Scot**

**From:** [REDACTED]  
**Sent:** 21 September 2022 13:37  
**To:** [REDACTED]>  
**Cc:** [REDACTED]  
**Subject:** Re: PLEASE READ - Meeting with Dame Ann Gloag and Deputy First Minister on 28 September 2022 - Time change

Dear [REDACTED]

Wednesday 28 September

Many thanks for your email and we confirm that the meeting will now take place from 09.00-10.30, rather than commencing at 09.30. Can you please let us know if the Deputy First Minister will be

accompanied for this meeting or if he will be attending alone in order that we may set the meeting space up accordingly.

Thanks and kind regards.

[REDACTED]

[REDACTED]

PA to Dame Ann Gloag DBE

Kinfauns Castle

Kinfauns

[REDACTED]

[REDACTED]

**From:** [REDACTED]

**Date:** Wednesday, 21 September 2022 at 13:26

**To:** [REDACTED]

**Cc:** [REDACTED]

**Subject:** PLEASE READ - Meeting with Dame Ann Gloag and Deputy First Minister on 28 September 2022 - Time change

Hi [REDACTED]

The Deputy First Minister's office has requested for this meeting to be changed slightly from 09:30 – 11:00 to 09:00 – 10:30?

Grateful if you could please confirm if possible.

Many thanks

[REDACTED]

[REDACTED]

**Digital Health & Care Briefing Manager**

**Digital Health and Care**

**Scottish Government**

**Twitter: @TECScotland @DigiCare4Scot**

**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery

**Sent:** 25 July 2022 09:18

**To:** [REDACTED] Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** [REDACTED]

**Subject:** RE: DFM & Dame Ann Gloag Meeting (202200298687) - Digital Health Delivery &

Management - 28/09

Hi [REDACTED],

All well here, thank you! ☺

That's wonderful – very grateful for your confirmation.

I am yet to hear from Dame Ann's office, but will get back to you the moment that I do!

Best wishes,

[REDACTED]

[REDACTED] | Assistant Private Secretary (Correspondence) to the Deputy First Minister of Scotland and Cabinet Secretary for Covid Recovery – John Swinney MSP | Scottish Government | St Andrew's House | Edinburgh | EH1 3DG | E: [REDACTED]

**From:** [REDACTED]

**Sent:** 25 July 2022 09:10

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** [REDACTED]

**Subject:** RE: DFM & Dame Ann Gloag Meeting (202200298687) - Digital Health Delivery &

Management - 28/09

Hi [REDACTED]

Thanks, hope you are well too ☺

We can pick this up, grateful if you can send me any information that Dame Ann's office have come back with.

Kind regards

[REDACTED]

[REDACTED]

**Digital Health & Care Briefing Manager**

**Digital Health and Care**

**Scottish Government**

**Twitter: @TECScotland @DigiCare4Scot**

- 1. CA Magazine, 28<sup>th</sup> April 2022**
- 2. John Fletcher CA, CFO at MySense, explains how AI is set to transform elderly care**





MySense is an innovative AI-powered solution designed to transform elderly care. CFO John Fletcher CA tells Christian Koch about tech-savvy pensioners, easing the strain on the NHS and the ethics of bathroom sensors

When Margaret, a 93-year-old grandmother living alone in a one-bedroom Stirling flat, wakes up at 7.15am, the first thing she does is boil the kettle to make a cup of tea. It's the first of four hot drinks over a day that also sees her make seven visits to the fridge, sit in her armchair for six hours 46 minutes and use the bathroom five times. By the time she falls asleep at 10pm, a staggering 15,000 data points have been collected on her comings and goings via web-connected sensors dotted around her home, plus a Fitbit-style smartwatch on her wrist: information that immediately pings its way to her caregiver, as well as her daughter in Toronto.

So far, so Orwellian, you might think. But the data gleaned from Margaret's travels around her home has tangible health values that could see the pensioner live at home for longer. The sensor on her fridge door? It provides insight into her nutritional habits, letting her caregiver and daughter know she's eating regularly. The device attached to her kettle and taps? She's staying hydrated. The smartwatch monitors her heart rate, while a belt wrapped around her mattress looks for changes in sleep patterns. And a sensor on the toilet lid can identify possible health issues by the number of bathroom breaks.

It's all part of a service provided by MySense, one of a growing number of AI-led "age-tech" firms set to transform elderly care. As CFO John Fletcher CA explains: "MySense builds a digital portrait of [an individual's] health that in some cases is able to give clinicians weeks of advance warning [about illnesses] based on tracking the data."

In doing so, the technology can help seniors enjoy more time living in the comfort of their own home – around six months extra independence for each patient, according to MySense research. "To be able to say to those with dementia, or the frail and elderly, that you can stay in your own home for longer because the data shows you've been looking after yourself can be a massive event in their lives," says Fletcher.

As such, it provides peace of mind for families, particularly those reluctant to place parents in a nursing home. "People have told us they feel reassured when checking their phones in the morning and seeing that their mum has got out of bed, made a cup of tea and visited the fridge. It means they don't have to worry about them so much at that point in time," says Fletcher. For those patients with dementia, tracking daily activity can show "whether somebody has left the house and not come back".

Allowing worried relatives to keep tabs on their older family members isn't the only way MySense can help. By reducing the need for round-the-clock supervision, it could lead to a fall in demand for caregivers, of whom there is a shortage in many western economies. The platform may ease the strain on health services by reducing the number of emergency calls and medical appointments, while the data gives doctors the opportunity to refer patients for tests earlier. One NHS/MySense study of dementia patients using the sensors found that unnecessary emergency hospital admissions and GP visits fell by 43% and 62% respectively, resulting in savings of £13,742 per patient.

### **Ups and downs**

MySense was founded in 2016 by Lucie Glenday, a digital strategist and self-confessed data geek, who felt compelled to create a healthcare solution after her 23-year-old sister died of a rare form of motor neurone disease. At present, the firm operates a B2B model, selling to the NHS, care homes and assisted living facilities. It has also set its sights on selling direct to consumers: Fletcher estimates its eight sensors, plus smartwatch and home hub, could retail as a £400 package.

Conditions seem ripe for the company's mainstream appeal. First, there's the demand for wellbeing apps and health-tracking wearables such as Fitbit and Apple Watch, which soared during the pandemic. The second is the sheer scale of the elderly market: the number of people aged 85 and over is projected to double from 1.6 million in 2016 to 3.2 million by 2041. Around 3.6 million older people live alone in the UK, while the combined annual savings of those in retirement, in 2015, was estimated at around £49bn by ILC-UK and Prudential. These older cohorts are also more tech-literate than were their predecessors; baby boomers set to enter their seventies and eighties this decade are no longer "the generation that tech forgot", but au fait with iPads, Instagram and IP addresses.

Their is a demographic that is increasingly likely to have their care catered via algorithms. If a retiree takes a tumble in their residential home, then fall-detection technology can alert their caregiver straight away. And the ever-present spectre of elderly loneliness – as damaging as smoking 15 cigarettes a day according to one study – may be eased by robots such as ElliQ, Pepper and GenieConnect, which are currently spinning around some UK nursing homes. These mechanical helpers use AI to hold simple conversations, host trivia games and play residents' favourite music (particularly helpful for dementia patients), as well as reminding them to take their medicine.

As ever with AI, alongside the benefits, there are questions about potential harm, not least privacy concerns. “Ethics went into the brickwork of MySense from day one,” says Fletcher. The company, which recently established an internal data ethics committee, stresses that it doesn’t monetise or sell the data that it gathers on its users. “We could have integrated with Alexa or included a webcam in sensors, but our approach has always been to leave data ownership to the end user and make them feel in control... We’re striving to use AI for good.”

Issues around gender, racial and cultural bias have been observed in other AI healthcare tech, such as apps used for diagnosing skin cancers, which could be less accurate for users with dark skin according to University of Oxford research. Fletcher says MySense spends “a lot of time building anti-bias mechanisms into our algorithms. For example, we know and account for the fact that diabetes presents itself differently across different ethnicities.”

AI health- and age-tech could also encounter challenges with insurers if they feel the AI has over-promised. “If a healthtech provider says, ‘there’s no chance you’ll get a heart attack or develop gallstones or arthritis based on the data we’ve collected with your genome or medical history’, that could be profoundly pernicious,” says Fletcher. He also raises his concerns that “as with all new technology, it may not be available to the poorest people”.

### **In principle**

Fletcher is well equipped to deal with the business challenges of advancing technology. The CA began working in telecoms in the 1990s, a time when “everybody thought mobiles were glamorous and exotic”. His career in the sector included nine years as director at KPMG, where he helped nations such as Iran, Iraq and the Bahamas build mobile networks and phone licences. Before joining MySense last year, he spent three years as a consultant, helping Malaysia switch its mobile network to 5G.

Throughout this, Fletcher says he has been steered by the “ethical commitment” that comes with qualifying as a CA. This principles-based approach to business not only helps him navigate the moral maze that comes with marrying AI and health, but also provides “discipline and focus on finances... investors and clients will always favour talking to the visionary entrepreneur over the CFO, but they want confidence this vision is [backed up by] properly controlled finances and rigorously tested projections that aren’t just a back-of-a-fag-packet calculations”.

The pandemic has presented challenges for MySense. The severity of the crisis meant the NHS and care providers “only had one thing on their mind for two years”. The social care system similarly struggled to adapt. But this is precisely where AI-based solutions have an opportunity to relieve the cost and staffing pressures affecting the sector. And, in turn, the opportunities for MySense look bright.

“I think as people become more demanding [about healthcare] and families more concerned about elderly relatives, MySense is in a good place,” he says. “We can’t stop chronic debilitating diseases – that’s not what we’re trying to do. But what we can do is allow data to

enhance the quality of life of so many elderly and frail people, or those with dementia. To know they can live independently for longer is great news."

**From:** [REDACTED]> **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery  
**Sent:** 05 May 2022 09:57  
**To:** Public Engagement Unit [REDACTED]  
**Cc:** [REDACTED]  
**Subject:** FW: MySense

For **MR Diary** Case please. Grateful if you could allocate to [REDACTED].

[REDACTED]—(apologies if you have moved on!) You may remember that DFM was planning to meet with Dame Ann Gloag last year, but this had to be postponed as her team weren't quite ready. Well, DFM saw and spoke with Dame Ann at the weekend, and has asked that we now re-engage and fix up a meeting.

Please feel free to get in contact with DFMPO if you need anything further. As ever, happy to help.

Many thanks in advance! ☺

Best wishes,

[REDACTED]

[REDACTED] | Assistant Private Secretary (Correspondence) to the Deputy First Minister of Scotland and Cabinet Secretary for Covid Recovery – John Swinney MSP | Scottish Government | St Andrew's House | Edinburgh | EH1 3DG | E: [REDACTED]

---

**From:** Ann Gloag [REDACTED]  
**Sent:** Tuesday, May 3, 2022 11:59:43 AM  
**To:** Swinney J (John), MSP [REDACTED]  
**Subject:** MySense

**CAUTION:** This e-mail originated from outside of The Scottish Parliament. Do not click links or open attachments unless you recognise the sender and know the content is safe.

Dear John

Given the conversation we had on Saturday, I thought this article would give you some insight into what I was talking about.

Looking forward to our meeting.

Ann

Dame Ann Gloag DBE

Kinfauns Castle

Perth

[REDACTED]

[REDACTED]

**1C) COMPOSITE OF DOCUMENTS PROVIDED**

Document 3: Email – Expert Economic Panel – From DFMPO

**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery  
**Sent:** 01 November 2022 09:27

**To:** [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED];  
[REDACTED]  
**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED];  
[REDACTED]; [REDACTED]; [REDACTED]  
**Subject:** RE: Expert Economic Panel

Thanks [REDACTED],

DFM has noted.

Kind regards,

[REDACTED]

[REDACTED]

Deputy Private Secretary to the Deputy First Minister and Cabinet Secretary for Covid Recovery

The Scottish Government | St Andrew's House, Regent Road, Edinburgh, EH1 3DG

T: [REDACTED] | M: [REDACTED] | E: [REDACTED]

All e-mails and attachments sent by a Ministerial Private Office to any other official on behalf of a Minister relating to a decision, request or comment made by a Minister, or a note of a Ministerial meeting, must be filed appropriately by the recipient. Private Offices do not keep official records of such e-mails or attachments.

Scottish Ministers, Special advisers and the Permanent Secretary are covered by the terms of the Lobbying (Scotland) Act 2016. See [www.lobbying.scot](http://www.lobbying.scot)

**From:** [REDACTED]

**Sent:** 31 October 2022 17:15

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]; [REDACTED]  
**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED];  
[REDACTED]; [REDACTED]; [REDACTED]  
**Subject:** RE: Expert Economic Panel

[REDACTED]

Thanks, really helpful.

We just had a brief discussion with expert panel members and we are finalising report so that it is available for publication on Wednesday alongside EBR.

The final changes are all fairly minor and we will finalise this tomorrow morning and provide formally to DFM at lunchtime tomorrow. We are working closely with EBR team on this.

Best Wishes

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]



**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery

**Sent:** 31 October 2022 11:13

**To:** [REDACTED]; [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery  
[REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED];  
[REDACTED]; [REDACTED]; [REDACTED]

**Subject:** RE: Expert Economic Panel

[REDACTED],

DFM has commented that this is a very valuable document and he would welcome its publication at the appropriate time. DFM asked for us to ensure OCEA are sighted on his thinking about EBR timing – I attach DFM's latest feedback on EBR.

Kind regards,

[REDACTED]

[REDACTED]

Deputy Private Secretary to the Deputy First Minister and Cabinet Secretary for Covid Recovery

The Scottish Government | St Andrew's House, Regent Road, Edinburgh, EH1 3DG

T: [REDACTED] | M: [REDACTED] | E: [REDACTED]

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**From:** [REDACTED]

**Sent:** 26 October 2022 22:25

**To:** [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]

**Subject:** RE: Expert Economic Panel

[REDACTED]

Following on from [REDACTED] email, attached is the updated version of expert panel report.

The Finance and Public Administration Committee have also contacted expert panel members about giving evidence post EBR as part of their evidence sessions. They have suggested Tuesday 15th November.

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

[REDACTED]



**From:** [REDACTED]  
**Sent:** 26 October 2022 15:03  
**To:** [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]  
**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]  
**Subject:** RE: Expert Economic Panel

[REDACTED]

Following FMs advice to publish the cost of living analytical report early next week, we would suggest publishing the expert panel commentary on the same timescale.

We will send an updated version of the expert panel report to DFM later today. This will be described as an interim commentary. The intention is still that the expert panel will provide further commentary after the UK Government's fiscal statement on 17<sup>th</sup> November.

We would be grateful if DFM could provide a view on timing and approach.

Thanks

[REDACTED]

[REDACTED]

Interim Deputy Director, Economic Analysis |  
Office of the Chief Economic Adviser (OCEA) |  
Mobile number: [REDACTED] | or call on MS Teams

**From:** [REDACTED]  
**Sent:** 26 October 2022 12:05  
**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]  
**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]  
**Subject:** RE: Expert Economic Panel

[REDACTED]

We have had a further iteration with members and are finalising this paper as planned. Any indication from DFM on timing or content.

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]



**From:** [REDACTED]

**Sent:** 24 October 2022 18:42

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]

**Subject:** RE: Expert Economic Panel

[REDACTED]

A further updated draft relating to economic expert report. We met with members on Friday and received comments over the weekend.

Attached is the current updated draft which has gone back to expert panel this evening.

I have flagged to members that EBR is being delayed until after 31st October but our intention is to finalise this piece of advice as planned this week.

Again happy to discuss or take comments.

Best Wishes

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]



**From:** [REDACTED]

**Sent:** 19 October 2022 20:14

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED];

[REDACTED]; [REDACTED]; [REDACTED]

**Subject:** Expert Economic Panel

[REDACTED]

Attached is an updated draft of the expert panel report. This has obviously had to be updated given the changes announced in recent days and we have gone back to panel members today for further comment and input. I am hoping to talk to them again on Friday to finalise and agree outstanding areas.

It is obviously still draft but any comments from DFM welcome and happy to discuss.

Best Wishes

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]



## Document 4: Email - RE: Expert Economic Panel - Briefing for Tomorrow's Meeting

Copying in SpAds – for their awareness

[REDACTED] | Finance and Economy Team Leader | Office of the Deputy First Minister and Cabinet Secretary for Covid Recovery – John Swinney

St Andrew's House | Regent Road | Edinburgh | EH1 3DG | Tel: [REDACTED] | Mob: [REDACTED]  
Email: [REDACTED]

All e-mails and attachments sent by a Ministerial Private Office to any other official on behalf of a Minister relating to a decision, request or comment made by a Minister, or a note of a Ministerial meeting, must be filed appropriately by the recipient. Private Offices do not keep official records of such e-mails or attachments.

**From:** [REDACTED]  
**Sent:** 14 November 2022 15:55  
**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]  
**Cc:** [REDACTED]; [REDACTED]; [REDACTED]  
**Subject:** Expert Economic Panel - Briefing for Tomorrow's Meeting

Hi [REDACTED],

As requested, please find attached a short briefing note ahead of the DFM's meeting with the expert panel members tomorrow afternoon.

Any questions, please let Iain or myself know. [REDACTED] sends his apologies.

Thanks,

[REDACTED]

**From:** [REDACTED]  
**Sent:** 01 November 2022 12:45  
**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]; [REDACTED]  
**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]  
**Subject:** RE: Expert Economic Panel

[REDACTED]

Thanks, attached is the final version of the expert panel report. It has been formatted by APS for on-line publication and we are just checking the final proof.

It is ready to be published tomorrow alongside supporting documents for EBR and we are working with [REDACTED] and EBR team with regard to that process.

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]



**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery

**Sent:** 01 November 2022 09:27

**To:** [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED];  
[REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED];  
[REDACTED]; [REDACTED]; [REDACTED]

**Subject:** RE: Expert Economic Panel

Thanks [REDACTED],

DFM has noted.

Kind regards,

[REDACTED]

[REDACTED]

Deputy Private Secretary to the Deputy First Minister and Cabinet Secretary for Covid Recovery

The Scottish Government | St Andrew's House, Regent Road, Edinburgh, EH1 3DG

T: [REDACTED] | M: [REDACTED] | E: [REDACTED]

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**From:** [REDACTED]

**Sent:** 31 October 2022 17:15

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]; [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]

**Subject:** RE: Expert Economic Panel

[REDACTED]

Thanks, really helpful.

We just had a brief discussion with expert panel members and we are finalising report so that it is available for publication on Wednesday alongside EBR.

The final changes are all fairly minor and we will finalise this tomorrow morning and provide formally to DFM at lunchtime tomorrow. We are working closely with EBR team on this.

Best Wishes

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]



**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery  
**Sent:** 31 October 2022 11:13  
**To:** [REDACTED]; [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery  
[REDACTED]  
**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED];  
[REDACTED]; [REDACTED]; [REDACTED]  
**Subject:** RE: Expert Economic Panel

[REDACTED]

DFM has commented that this is a very valuable document and he would welcome its publication at the appropriate time. DFM asked for us to ensure OCEA are sighted on his thinking about EBR timing – I attach DFM's latest feedback on EBR.

Kind regards,

[REDACTED]

[REDACTED]

Deputy Private Secretary to the Deputy First Minister and Cabinet Secretary for Covid Recovery

The Scottish Government | St Andrew's House, Regent Road, Edinburgh, EH1 3DG

T: [REDACTED] | M: [REDACTED] | E: [REDACTED]

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Scottish Ministers, Special advisers and the Permanent Secretary are covered by the terms of the Lobbying (Scotland) Act 2016. See [www.lobbying.scot](http://www.lobbying.scot)

**From:** [REDACTED]  
**Sent:** 26 October 2022 22:25  
**To:** [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]  
**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED];  
[REDACTED]; [REDACTED]; [REDACTED]  
**Subject:** RE: Expert Economic Panel

[REDACTED]

Following on from [REDACTED] email, attached is the updated version of expert panel report.

The Finance and Public Administration Committee have also contacted expert panel members about giving evidence post EBR as part of their evidence sessions. They have suggested Tuesday 15th November.

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]



**From:** [REDACTED]

**Sent:** 26 October 2022 15:03

**To:** [REDACTED]; Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED];

[REDACTED]; [REDACTED]; [REDACTED]

**Subject:** RE: Expert Economic Panel

[REDACTED]

Following FMs advice to publish the cost of living analytical report early next week, we would suggest publishing the expert panel commentary on the same timescale.

We will send an updated version of the expert panel report to DFM later today. This will be described as an interim commentary. The intention is still that the expert panel will provide further commentary after the UK Government's fiscal statement on 17<sup>th</sup> November.

We would be grateful if DFM could provide a view on timing and approach.

Thanks

[REDACTED]

[REDACTED]

Interim Deputy Director, Economic Analysis |  
Office of the Chief Economic Adviser (OCEA) |  
Mobile number: [REDACTED] | or call on MS Teams

**From:** [REDACTED]

**Sent:** 26 October 2022 12:05

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]

**Subject:** RE: Expert Economic Panel

[REDACTED]

We have had a further iteration with members and are finalising this paper as planned. Any indication from DFM on timing or content.

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]

 @ScotGovOCEA

**From:** [REDACTED]

**Sent:** 24 October 2022 18:42

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]

**Subject:** RE: Expert Economic Panel

[REDACTED]

A further updated draft relating to economic expert report. We met with members on Friday and received comments over the weekend.

Attached is the current updated draft which has gone back to expert panel this evening.

I have flagged to members that EBR is being delayed until after 31st October but our intention is to finalise this piece of advice as planned this week.

Again happy to discuss or take comments.

Best Wishes

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]



**From:** [REDACTED]

**Sent:** 19 October 2022 20:14

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** Director of Tax and Revenues [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]

**Subject:** Expert Economic Panel

[REDACTED]

Attached is an updated draft of the expert panel report. This has obviously had to be updated given the changes announced in recent days and we have gone back to panel members today for further comment and input. I am hoping to talk to them again on Friday to finalise and agree outstanding areas.

It is obviously still draft but any comments from DFM welcome and happy to discuss.

Best Wishes

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]



Document 5: Email - RE: 14:30 - 15:00 Meeting: Economic Experts Chat

**From:** [REDACTED]

**Sent:** 09 December 2022 12:19

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; Director of Budget and Public Spending [REDACTED]; Director of Tax and Revenues [REDACTED]; [REDACTED]; DG Economy [REDACTED]; [REDACTED]

**Subject:** RE: 14:30 - 15:00 Meeting: Economic Experts Chat

[REDACTED]

We had another meeting with expert panel this morning and I attach latest draft of their report. We are taking final comments over the weekend and will finalise with expert panel on Monday.

Best Wishes

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]



**From:** [REDACTED]

**Sent:** 29 November 2022 18:15

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; Director of Budget and Public Spending [REDACTED]; Director of Tax and Revenues [REDACTED]

**Subject:** RE: 14:30 - 15:00 Meeting: Economic Experts Chat

Hi [REDACTED]

To update following the meeting on 15 November. A summary of the key points is provided below. We have also been engaging with expert panel on their subsequent report and we are meeting

with them later this week. The expert panel are also scheduled to attend Committee on the morning of 20<sup>th</sup> December as part of Finance committee budget scrutiny.

### **Expert Panel Meeting -15th November – Summary Note.**

DFM convened with the expert panel (Professor Sir Anton Muscatelli, Professor Frances Ruane and Dr Mike Brewer). OCEA officials ([REDACTED]) were in attendance. Apologies were received from [REDACTED].

DFM began by thanking the panel for their initial paper, which he felt was a thoughtful and reflective commentary and contribution to the debate in period of significant uncertainty and economic turmoil. The discussion included the following points.

- The UK fiscal and macroeconomic outlook has changed since the mini-budget, with a deterioration in the public finances.
- The Autumn Statement is likely to be a mixed policy package, with key decisions for low income households around benefit uprating and the replacement for the Energy Price Guarantee.
- UK spending may not be cut in the short term, although there may be tax increases in the form of threshold freezes which result in fiscal drag and hence additional revenues at a time of high inflation.
- Increases in UK funding for the NHS would be helpful to the Scottish budget but increases in defence spending may squeeze other Whitehall budgets with implications for the Scottish Government's Barnett consequentials.
- There may be implications for Scotland if the UK Government made changes to the additional rate income tax threshold.
- There is the prospect that the UK Government may relax some of its budgetary constraints or fiscal rules. Small changes to how fiscal sustainability is defined could actually have a bigger impact on meeting fiscal rules than changes to tax.
- The Autumn Statement is likely to be a complex picture and time would be needed to digest and respond.
- The panel will provide further reflection after the Autumn Statement on the tax and spending choices available for Scottish Government.

[REDACTED]

[REDACTED]

*Chief Economist*

*Scottish Government*

*Tel:* [REDACTED]



**From:** [REDACTED] **On Behalf Of** Deputy First Minister and Cabinet Secretary for Covid Recovery  
**Sent:** 09 November 2022 12:35  
**To:** [REDACTED]  
**Cc:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]  
**Subject:** RE: 14:30 - 15:00 Meeting: Economic Experts Chat

Hi [REDACTED],

Thanks for this note. I will forward on the invite to [REDACTED].

Many thanks,

[REDACTED]  
Assistant Private Secretary (Diary) to the Deputy First Minister and Cabinet Secretary for Covid Recovery – John Swinney

The Scottish Government | St Andrew's House, Regent Road, Edinburgh, EH1 3DG

E: [REDACTED]



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-----Original Appointment-----

**From:** [REDACTED] **On Behalf Of** [REDACTED]  
**Sent:** 09 November 2022 12:15  
**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery  
**Subject:** Declined: 14:30 - 15:00 Meeting: Economic Experts Chat  
**When:** 15 November 2022 14:30-15:00 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.  
**Where:** Microsoft Teams

Apologies, [REDACTED] will be on leave so will be unable to make this meeting. [REDACTED] will cover him

**1D) COMPOSITE OF DOCUMENTS PROVIDED**

Document 1: Email – DFM meeting with opposition parties on Scottish Covid-19 Inquiry - 3 October 2022 - note of meeting

**From:** [REDACTED]

**Sent:** 17 October 2022 10:37

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** Solicitor General [REDACTED]; Permanent Secretary [REDACTED]; DG Education & Justice v; Legal Secretariat to the Lord Advocate [REDACTED]; Solicitor to the Scottish Government [REDACTED]; Director of Safer Communities [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; Communications First Minister [REDACTED]; Communications DFM & Covid Recovery [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]

**Subject:** DFM meeting with opposition parties on Scottish Covid-19 Inquiry - 3 October 2022 - note of meeting

PS/DFM

Copy to: PS/FM

Solicitor General

Officials on copy list (restricted handling)

I enclose below the note of DFM's meeting with opposition party leaders following Lady Poole's resignation, as cleared by DFM and now circulated to usual wider copylist. CIED will file a copy of this for the record. Apologies for the delay in getting this note circulated, but please let me know if anything further is needed.

Best wishes,

[REDACTED]

[REDACTED]

Interim Deputy Director: Covid Inquiry Establishment Division | Directorate for Safer Communities | Scottish Government | [REDACTED] | [REDACTED]

BEGINS

The Deputy First Minister met with opposition party representatives on Monday 3 October following the resignation of Lady Poole as Chair of the Scottish Covid-19 Inquiry.

In attendance: Murdo Fraser MSP, Douglas Ross MSP, Jackie Baillie MSP, Gillian Mackay MSP, Alex Cole-Hamilton MSP

Also present: [REDACTED], [REDACTED] (DFM Private Office), Callum McCaig (Special Advisers), [REDACTED] (SG Covid Inquiry Establishment Division)

DFM began by summarising events leading up to the meeting and following receipt of Lady Poole's resignation on Friday 30 September, noting that he had already spoken to the Lord President regarding a potential nomination for a new Chair for the Inquiry and wanted to move with all urgency to secure a replacement for Lady Poole and maintain the Inquiry's progress. The aim would be to reach a position of as little interruption to the Inquiry's process as possible through the change of Chair, and as part of this it would be important to reach agreement on the Inquiry's TOR with a new Chair – the intention being to minimise any change to the direction of travel of the Inquiry, based on which detailed work had already been undertaken. DFM undertook to report to Parliament as quickly as possible on a new Chair and to be available for dialogue with party leaders accordingly.

In discussion:

Murdo Fraser MSP asked whether it was anticipated to be difficult to secure a new judge to take over as Chair given existing demands on the judiciary, to which DFM indicated in responding that he expected to receive a positive indication from the Lord President in relation to a potential nomination based on their discussion.

Jackie Baillie MSP noted that she had been disappointed to hear of Lady Poole's resignation as she had been impressed with her work when meeting her and hoped that the progress Lady Poole had made would be captured within the next phase of the Inquiry's activity. Regarding timescales, the question was raised of how much of a delay, if any, Lady Poole's resignation would cause to the Inquiry's work? In responding, DFM noted his wish to begin with a new Chair with the point Lady Poole had reached as the template, and that both the Inquiry team of staff and Lady Poole herself would be able to assist with this. It would be the aim to avoid changes to the TOR and ways of working to date, and resource has already

been built up within the Inquiry team and those staff will continue in place, however this would depend on a new Chair being prepared to take up where Lady Poole left off.

Alex Cole Hamilton MSP noted that he had also been impressed when meeting Lady Poole and would be sad to see her leave the role of Inquiry Chair, noting that, when they met, Lady Poole had talked about setting up the back office functions of the Inquiry – could DFM provide assurance that these would remain in place and not be unpicked? DFM noted that it was very much his wish to that this work would remain, however he could not absolutely insist on this to a new Chair as he cannot interfere in the operational decisions of the Inquiry. However, it would be reasonable to ask a new Chair if they would be prepared to take forward the Inquiry based on all the work done so far, and to build upon that work.

Douglas Ross MSP noted that Lady Poole had raised some concerns around support from the SG in relation to resources and staffing when they met earlier this year, and asked firstly whether Lady Poole had shared these concerns with DFM and secondly what would be done to reassure bereaved families that they do not need to start again from the beginning with a new Inquiry Chair? DFM noted that officials had contacted bereaved families representatives that morning, and that he had met with one group earlier that day and would meet with others next week if not before then. It would be the intention to offer reassurance to bereaved families that SG would not want them to have to start again with a new Chair. On the question in relation to resources, DFM noted that in order to safeguard the Inquiry's independence it would not be possible for the SG to for example offer some of its own staff resource to support the Inquiry in areas such as legal support, and it was recognised that Lady Poole had wished to see processes such as procurement move more quickly. However, the specific concerns Lady Poole had raised with DFM in relation to resourcing had now been addressed.

In concluding, DFM extended an open offer for opposition parties to raise any further issues with him.

ENDS

Document 2: Email - DFM meeting with opposition parties - Covid-19 Inquiry - draft note of meeting

Good morning team,

With apologies for the delay in sending this to you, I enclose for DFM's consideration a note of the meeting with opposition parties last Monday evening – once DFM is content, I will circulate this to our wider standard copylist and file a copy for the record. This is the first meeting with all opposition parties that I have supported so if the convention is different (for example unattributed minutes) then please just let me know and I will update the note to reflect.

I am offline for an appointment for the first part of this morning but please just give me a call later if helpful to discuss or if anything further is needed.

Best wishes,

[REDACTED]

[REDACTED]

Interim Deputy Director: Covid Inquiry Establishment Division | Directorate for Safer Communities | Scottish Government | [REDACTED] | [REDACTED]

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ENDS

**1E) COMPOSITE OF DOCUMENTS PROVIDED**

Document 1: Email – Ministerial Briefing – DFM Meeting with Tracy Black, Scotland Director, CBI – 5 October 2022

**From:** [REDACTED]

**Sent:** 03 October 2022 17:59

**To:** Deputy First Minister and Cabinet Secretary for Covid Recovery [REDACTED]

**Cc:** DG Economy [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; Business Engagement [REDACTED]; [REDACTED]; [REDACTED]; EPCD Mailbox [REDACTED]; [REDACTED]; [REDACTED]

**Subject:** Ministerial Briefing - DFM Meeting with Tracy Black, Scotland Director, CBI - 5 October 2022

Good afternoon [REDACTED]

[REDACTED]

Please find attached briefing ahead of DFM's short meeting with Tracy Black, Scotland Director CBI, who will be joined by the newly appointed [REDACTED], Deputy Director for Policy.

Also attached is the letter from CBI to FM and the draft response from DFM is currently with him for signature (MiCase: [REDACTED]). I have captured a short summary in the briefing as CBI have indicated this letter and the Scottish Government plans for an emergency budget are the focus of their 30 minute conversation.

Please let me know should DFM require anything further.

Many thanks

[REDACTED]

[REDACTED]|| Strategic Business Engagement Team Lead  
Scottish Government | Strategic Business Engagement and Events | Economic Strategy  
Directorate | 3rd Floor | 5 Atlantic Quay | 150 Broomielaw | Glasgow | G2 8LU

Mob: [REDACTED]|| email: [REDACTED]

**I am working remotely and am available by email or MS Teams**

[Please note: I'm sending this email at a time convenient for me. Even if I've emailed you at an odd time, I don't expect a response outside of your working hours; when you are caring for others; on a non-work day or at the weekend]

Document 2: Ministerial Briefing – DFM Meeting with Tracy Black, Scotland Director, CBI – 5 October 2022

<b>What</b>	<b>CBI Scotland: Conversation with Tracy Black</b>
<b>When</b>	Wednesday 5 October 2022, 09:00-09:45
<b>Where</b>	Microsoft Teams link  [REDACTED]
<b>Who</b>	<b>Tracy Black</b> , Scotland Director, CBI  [REDACTED], Deputy Director of Policy, CBI Scotland
<b>Why</b>	Tracy Black wrote to you on 2 September in advance of the Programme for Government publication and the emergency budget announced by The First Minister on 23 August. You agreed to this conversation in response to CBI's letter. The aim is to discuss the current Cost Crisis, the recent UK Government announcements and the CBI Scotland asks of Scottish Government.
<b>Key Message</b>	<ul style="list-style-type: none"> <li>• Welcome CBI Scotland's continued engagement with Ministers</li> <li>• CBI Scotland is a key partner in helping the Scottish Government to build a fairer and more prosperous society in Scotland.</li> <li>• Recognise the challenging times for business – and government and welcome the opportunity to identify ways we can work together towards our shared ambitions of a thriving, greener, and fairer economy</li> </ul>
<b>Official Support</b>	[REDACTED]
<b>Social Media</b>	N/A: closed meeting
<b>Briefing Contents</b>	<b>Annex A</b> – Purpose and Lines to Take <b>Annex B</b> – Background and biographies <b>Annex C</b> – CBI asks of SG: CBI letter to FM 2 September <b>Annex E</b> – CBI Response to UKG announcements to address the Cost Crisis

## ANNEX A

### PURPOSE

You agreed to this meeting following an approach by Tracy Black, Scotland Director at CBI as you took on the additional Finance and Economy portfolio to cover for Ms Forbes.

On 2 September CBI Scotland wrote to you ahead of the Programme for Government and following the announcement by the First Minister of an emergency budget.

There is no set agenda for the discussion, however, CBI have indicated they wish to discuss with you the current cost crisis, the recent UK Government announcements and their ask of Scottish Government ahead of its proposed emergency budget.

In their letter of 2 September, CBI highlighted key areas that they believe need to be addressed, to provide support to business and ensure that Scotland can create the best conditions for a productive, growing economy – which it believes is ultimately the best antidote to the cost-of-living crisis.

The letter of 2 September contains the following areas that CBI believe need to be addressed:

1. **Targeted support to protect jobs** through the current cost of doing business crisis including a **freeze on business rates for 2023/24** and **immediately reduce the Large Business Supplement**.
2. **Target skills investment to secure Scotland's future growth industries**, including:
  - greater focus on **retraining and upskilling** together with ensuring skills funding is more adaptive to industry and wider economic needs.
  - Getting the **right balance for further and higher education budgets** to suit Scotland's economic needs.
  - Targets approach to support **economically inactive adults** in to the workplace.
3. Support business to **deliver on a green economy**, including:
  - A renewed focus on developing a **whole-system approach to planning**. For example, greater clarity and precision is needed in the revised NPF4; ensure **sufficient resource to planning departments** to deal with current and future demand and encourage best practice sharing to develop a **cohesive and consistent process**.
  - Reform the planning and non-domestic rates systems to support investment in low-carbon infrastructure, so that **green improvements made to properties are de-rated and not subject to any rates liabilities** (installation of solar panels and heat pumps)

### LINES YOU MAY WISH TO USE IN DISCUSSION

#### Introduction

- [REDACTED]

## **Cost Crisis**

- Recognise that firms across Scotland are facing significant rises in energy bills, dramatic price increases in freight, delays in the supply chain and the challenge of filling staff vacancies.
- The Programme for Government sets out our response to the cost crisis, as well as our ambition to create a better future in the longer term.
- We are doing all we can with the finite financial resources and limited powers currently available to us to help businesses tackle the rising cost crisis.
- The UK Government's Energy Bill Relief Scheme for non-domestic consumers needs to offer early clarity on protections following 31 March 2023
- In order to allow time to analyse the implications of the UKG's tax announcements of 23 September, Scottish Government will report the results of the Emergency Budget Review in the week beginning 24 October.
- Resources and fiscal flexibilities – the different UK and Devolved Administration Budget rhythms and frequent changes in funding for Devolved Administrations make planning spending more challenging. The (then) Chancellor refused to extend the Barnett Guarantee, which provided certainty in 2020-21 on the amount of consequential funding.
- Capital and financial transactions – the Scottish Government's capital grant allocation over the next 3 years was materially less than expected, with low real terms growth over the period, and the confirmed Financial Transactions do not compensate for the loss in capital grant.
- The UKG's decision to disburse the Levelling-Up Fund directly across the UK, despite previous commitments otherwise, impacts on the level of devolved funding available to the SG for Scotland.

## **BACKGROUND AND BIOGRAPHIES**

### **Background**

CBI UK speaks on behalf of sectors across the economy and its 190,000 UK-wide membership includes firms and trade associations, coming together with common priorities and a shared vision. Together 700 member organisations employ nearly seven million people in the UK. The organisation proactively speaking to government about issues and opportunities and is currently focused on decarbonisation; innovation; global trade; and workforce.

### **Biographies**

[REDACTED]

[REDACTED]

#### **Key Priorities for CBI include:**

CBI have raised the following concerns on behalf of their members:

- labour shortages/difficulty to attract talent – there's an ask for funding for upskilling
- the mental and financial health of employees
- Supply chain issues
- Increased cost of living and energy costs

#### **Recent Ministerial and Senior Official engagements:**

You were due to deliver the keynote speech at **CBI Annual dinner on 8 September 2022** which was cancelled at short notice due to the death of Her Majesty, Queen Elizabeth.

- **10 August 22: Permanent Secretary and DG Net Zero** – participated in a Net Zero opportunities discussion with CBI with follow up discussions taking place including on Scotwind, hydrogen, supply chain, key research opportunities. CBI members are working on a range of Net Zero areas including CO2 Trial (Malcolm Group), Deposit Return Scheme (Tesco); Grid Supply challenges (Chivas Brothers)
- **01 June 2022:** DG Economy introductory meeting with Tracy Black and Keith Anderson
- **25 May 22:** Minister for Business, Trade, Tourism and Enterprise, CBI Council Meeting to discuss NSET

- **20 April 22:** Minister for Business, Trade, Tourism and Enterprise, Quarterly Meeting
- **22 March 22:** First Minister, Introductory meeting with Tony Danker
- **22 March 22:** First Minister, CBI leaders dinner
- **19 January 22:** Minister for Business, Trade, Tourism and Enterprise, Quarterly Meeting

#### **Ministerial engagements arranged**

- **14 October 22:** Minister for Business, Trade, Tourism and Enterprise (Quarterly meeting)
- **27 October 22:** FM, Scottish Leaders Mentoring Scheme – Bute House evening reception

#### **CBI Planned Events**

- **CBI Skills Event** – now arranged for 3 November 2022 (09:30 – 13:00) at Glasgow Clyde College. An audience of business and academic representatives will discuss 2 areas: 1. Skills (where do we get talent) and 2. Workplace transformation (Hybrid working). CBI seeking Ms Somerville's participation as keynote speaker.

**CBI RESPONSE TO RECENT UK GOVERNMENT ANNOUNCEMENTS**

**UKG Energy Support Package (21/09)**

**Matthew Fell, CBI Chief Policy Director, said:**

“We welcome government’s quick and decisive action to provide hard-pressed businesses with a substantial short-term fix to a long-term problem.

- “The package will ease worries about otherwise viable businesses shutting-up shop and smaller companies especially will benefit from the discounted rate.
- “Businesses will also want to know more about the exit strategy and what happens when the six-month cap runs out. Working closely with business will be key to successful implementation.
- “The long-run solution is to double-down on energy security and to incentivise firms to push ahead with ambitious energy efficiency programmes to lower demand.”

**CBI Response To Chancellor’s Fiscal Statement –(23/09)**

**Tony Danker, CBI Director-General, said:**

“This is a turning point for our economy. Like Covid, the energy crisis has meant Government has had to spend massively to protect people and businesses. That means we have no choice but to go for growth to afford it.

“Today is day one of a new UK growth approach. We must now use this opportunity to make it count and bring growth to every corner of the UK. Fifteen years of anaemic growth cannot be repeated.

“Taking action to get Britain’s economy moving again by beginning construction on transport and green infrastructure projects shows immediate delivery. Planning reform is long overdue. A simpler, smarter approach to tax can pay dividends, and firms will be keen to make the most of the investment incentives on offer.

“It’s not perfect – it’s just the beginning – but there’s plenty business can work with. The Chancellor signalled more proposals to come this Autumn and these will be vital to sustain momentum on growth.”

**Comments made by Tony Danker, Director-General of CBI, in a speech and reported in the Financial Times, (28/09)**

- The UK Government must do more to reassure markets; macroeconomic stability is a precondition for UKG Ministers to embark on their plans for significant supply-side reforms.
- Businesses are concerned about inflationary pressures and national debt levels from the £45bn worth of tax cuts.
- CBI recommends that growth take priority over Conservative doctrine, for example:
  - Open up immigration for sectors where labour shortages are hitting business, such as through more temporary visas for hard-hit sectors and urgently renewing shortage occupation lists
  - Abandon scepticism on net zero and unlock green investments

Excerpts from the FT article are below:

*"There is a lot of Conservative doctrine which will need to now come secondary to this plan for growth."*

He urged ministers to agree on plans to open up immigration for sectors where labour shortages were hitting businesses. *"It's absolutely a barrier to growth — I can tell you 10 companies who in the past few weeks have told me 'I'm not investing' or 'I'm not growing because I just can't get the people',"* he said.

Danker also pointed to the need to abandon "scepticism on net zero" and tackle planning reform "once and for all", saying priorities could change quickly.

Excerpts from the speech, as reported [here](#), are:

*"Above all it means growth must come before other Conservative doctrine. On immigration, the economy is clearly suffering from labour shortages – let's be open to more temporary visas for hard hit sectors and urgently renew the Shortage Occupations List.*

*"On net zero, this is one of the golden opportunities of our age for many reasons – let's not go backwards, let's unlock the green investments waiting in the wings."*

#### **CBI: General responses to Cost Crisis – Taken from Main Business Organisation Discussions on 18/08 and 29/09**

- Brutal is the term being used by members, tougher than Covid. **(18/8)**
- Large businesses are also vulnerable. Need to protect most vulnerable in society but business unable to absorb all the cost. **(18/8)**
- Some good news specifics include VAT (whisky trade) and changes to NIC. Investment zone announcement is attractive to members but keen to see how it fits with green/ freeports Income tax rate changes . Concern about what SG response to the income tax changes will be. SG needs to grow its tax base and not put people off settling in Scotland. **29/09**

#### **CBI: responses to Energy/production costs - Taken from Main Business Organisation Discussions on 18/08 and 29/09**

Noted Energy crisis is complex for business but member feedback shows its welcome, particularly focus on growth to bring back economic stability **(29/09)**

- Example of a global manufacturer that made £8bn pre Covid, now at £5bn but haemorrhaging £300m a week - energy costs now £24m a year, had threat of strike action therefore paid 10% wage increase which they can't afford but would of shut down business, rise in cost materials, large increase in wait for metals (over 80 weeks), freight cost was 3% is now 14%, having to sue suppliers or financially support them as if they collapse then entire business supply goes - large business won't survive. Diesel and fuel cost up. **(18/8)**
- Want focus on energy costs for households and business. Energy price cap and controlling inflation are top asks. **(18/8)**

- Need to be supporting the poorest in society and welcome UKG support around energy bills. Next cost increase in October and we can expect around £40 billion to be taken out of the economy - government needs to encourage business investment and growth. **(26/5)**
- Fuel costs, for every penny that goes up, it is a £200,000 hit for company overheads. 4 times increase in energy costs. **(5/5)**
- CBI-UK working with UKG on addressing energy costs. Mid-term focus is the growth agenda and how to maintain momentum despite current major issues. **(7/4)**

## Document 3: Letter – From CBI to FM



2 September 2022

Rt Hon Nicola Sturgeon MSP  
First Minister of Scotland  
Sent by email

Dear First Minister

### **Programme for Government: support business now to enable long-term economic security**

As Scotland emerged from the pandemic last year, none of us could have forecast the challenges businesses and individuals would face as we head into the autumn of 2022.

Much attention has – rightly – been focused on households, and the impact the cost-of-living crisis is having across the country. However, business is not immune from cost pressures, and without swift action from government, many viable businesses could easily tip into distress.

We know firms across Scotland are facing significant rises in energy bills, dramatic price increases in freight, delays in the supply chain and the challenge of filling staff vacancies. Providing support to business now is critical, to ensure that Scotland can create the best conditions for a productive, growing economy – which is ultimately the best antidote to the cost-of-living crisis.

To get our economy growing, it is imperative business continues to invest in net zero, technology and people if we want Scotland to remain a competitive place to do business. Decisive action taken now will give firms that all-important headroom on areas like cashflow, and help prevent this short-term crunch leading to a long-term decline.

The opportunities for growth available in Scotland are huge – especially if we build on our existing strengths. Whether that's in our higher education sector, financial services, renewable energy, construction, or food and drink – the opportunities for growth are there, but business and government must be grasp these opportunities together, quickly.

We recognise overcoming the immediate challenges will not be straightforward. Businesses share many of your objectives for the future of a strong, growing, inclusive Scottish economy – and welcomed the remarks you made at the CBI Leaders' Dinner earlier this year.

With government creating the conditions for growth, business can be the partner in delivering that long-term, sustainable growth to benefit households and communities right across Scotland. Below are some of the key steps your government can take to help Scotland on this journey.

#### **1. Provide targeted support to protect jobs through the current cost of doing business crisis**

With rising bills across the board, firms need all important headroom to support employees, keep customer costs down and ensure investment plans for future growth are not jeopardised. The burden on businesses is growing all the time – and firms are already feeling the squeeze.

**The Scottish Government should announce a freeze on business rates for 2023/24 to provide certainty for firms as they head into the Autumn.** This would head off a business-as-usual approach that would otherwise see rates increasing with inflation and piling additional pressures on firms when they can least afford them.

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 @CBItweets

Director General:  
Tony Danker  
President:  
Brian McBride  
Registered No:  
RC000139 (England & Wales)  
Registered Office:  
CBI, Cannon Place, 78 Cannon  
Street, London EC4N 6HN

**Immediately reduce the Large Business Supplement.** Businesses across Scotland are facing many of the same challenges as other parts of the UK. The Scottish Government should therefore speed up their 2021 manifesto commitment to bring the Large Business Supplement into line with rates in England this year, ensuring firms are not facing a longer-term competitive disadvantage during the current cost-of-doing business crisis.

## **2. Target skills investment to secure Scotland's future growth industries**

Labour market shortages remain acute across the whole economy. Scotland's high employment rate cannot hide the fact many firms are struggling to attract the right talent into the right roles – essential for firms looking to grow, deliver long-term economic growth, and provide secure employment opportunities.

**Greater focus needs to be put on retraining and upskilling and making sure skills funding is more adaptive to industry and wider economic needs.** The role of Scotland's colleges and universities in preparing our next generation of workers cannot be underestimated. But with a planned real-terms cut to Scotland's further and higher education funding, a renewed focus must be placed on how funding can be best targeted between undergraduate learning, work-based training, alongside upskilling and rapid retraining to strike the right balance to suit Scotland's economic needs.

**A targeted approach to support economically inactive adults back to the workplace.** Scotland has a higher rate of economically inactive workers compared to the UK as a whole. A particular focus should be on attracting those aged between 50 and 65 back to the workplace. With over 800,000 economically inactive adults across Scotland, now is a critical moment to target this group, build on their skillset, and enable firms to grow.

## **3. Back business to deliver on a green economy**

Whilst the immediate business priorities are focused on the cost of doing business, long-term objectives on delivering a green economy must be sustained and enhanced. As we approach the anniversary of Glasgow's success in hosting COP26 last year, business and government must together remain committed to delivering on net zero.

**A renewed focus on developing a whole-system approach to planning.** Whilst NPF4 provides the basis of an updated framework, to unleash investment, greater clarity and precision is needed in the revised NPF4 this Autumn. Businesses remain concerned that planning departments are not sufficiently resourced to deal with current – and future – demand. Steps should be taken by the Scottish Government to encourage, and share, best-practice amongst planners. This will help ensure innovative solutions are not stymied through lack of awareness. Creating a more joined-up, consistent process, alongside greater uniformity in decision-making, will be crucial in ensuring the priorities of NPF4 are delivered.

**Reform the planning and non-domestic rates systems** to support investment in low-carbon infrastructure. For example, all green improvements made to properties, such as the installation of solar panels and heat pumps, should be de-rated and not be subject to any rates liabilities.

The examples above are just a few of the areas where government and business can turn shared ambition into action as we work towards a strong, inclusive, economic recovery.

As always, I would welcome the chance to discuss the above proposals with you, and how businesses can overcome the immediate challenges, and build a partnership with your government to deliver prosperity across Scotland.

All best wishes,



**Tracy Black**  
CBI Scotland Director

## Document 7: Email – CBI and Ministerial Engagements

Hi [REDACTED]

Many thanks. I've now reported my misreading error to DFM's office and will come back with revised options shortly (I hope!).

Thanks for confirming [REDACTED] will join the conversation.

[REDACTED]

**[REDACTED] | Strategic Business Engagement Team Lead**  
**Scottish Government | Strategic Business Engagement and Events | Economic Strategy**  
**Directorate | 3rd Floor | 5 Atlantic Quay | 150 Broomielaw | Glasgow | G2 8LU**

Mob: [REDACTED] | email: [REDACTED]

### **I am working remotely and am available by email or MS Teams**

[Please note: I'm sending this email at a time convenient for me. Even if I've emailed you at an odd time, I don't expect a response outside of your working hours; when you are caring for others; on a non-work day or at the weekend]

**From:** [REDACTED]  
**Sent:** 30 September 2022 10:05  
**To:** [REDACTED]; [REDACTED]; [REDACTED]  
**Cc:** [REDACTED]; [REDACTED]  
**Subject:** RE: CBI and Ministerial Engagements

Hi [REDACTED]

Just jumping in here, I'm afraid that's one of the times that Tracy can't move meetings – she has a board meeting at that point. Just re-pasting the times Tracy can't make next week:

Tuesday – 3 to 4.3pm

Wednesday 3-3.30pm

Thursday 1.30 – 4.30pm

Happy to keep it virtual, and it's likely that [REDACTED] will join the call too.

Thanks

[REDACTED]

[REDACTED]

D: [REDACTED] | M: [REDACTED]

**From:** [REDACTED]  
**Sent:** 30 September 2022 09:54  
**To:** Tracy Black [REDACTED]; [REDACTED]; [REDACTED]  
**Cc:** [REDACTED]; [REDACTED]  
**Subject:** RE: CBI and Ministerial Engagements

Hi [REDACTED]

Deputy First Minister's office have just replied offering Thurs 6 Oct 13:30-14:15 – does that work?

We'll do the call virtually if that's okay (easier to fit in to everyone's busy diaries). Will anyone else join you on the call?

Many thanks

[REDACTED]

[REDACTED] | Strategic Business Engagement Team Lead  
Scottish Government | Strategic Business Engagement and Events | Economic Strategy  
Directorate | 3rd Floor | 5 Atlantic Quay | 150 Broomielaw | Glasgow | G2 8LU

Mob: [REDACTED] | email: [REDACTED]

**I am working remotely and am available by email or MS Teams**

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**From:** [REDACTED]  
**Sent:** 30 September 2022 09:12  
**To:** 'Tracy Black' [REDACTED]; [REDACTED]; [REDACTED]  
**Cc:** [REDACTED]; [REDACTED]  
**Subject:** RE: CBI and Ministerial Engagements

Hi [REDACTED]

Thanks so much for your reply and I completely understand how busy your diary is. I'll reply to the Deputy First Minister's office on 5 October and advise on both his availability and any confirmation of 14 Oct for Mr McKee.

Many thanks and if I don't email before then, have a good weekend.

Kind regards

[REDACTED]

[REDACTED] | Strategic Business Engagement Team Lead  
Scottish Government | Strategic Business Engagement and Events | Economic Strategy  
Directorate | 3rd Floor | 5 Atlantic Quay | 150 Broomielaw | Glasgow | G2 8LU

Mob: [REDACTED] | email: [REDACTED]

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**From:** Tracy Black [REDACTED]  
**Sent:** 30 September 2022 09:08  
**To:** [REDACTED]; [REDACTED]; [REDACTED]  
**Cc:** [REDACTED]; [REDACTED]  
**Subject:** RE: CBI and Ministerial Engagements

Dear [REDACTED]

I'm unfortunately Chair the ScotRail Stakeholder panel and this month's is on the 5<sup>th</sup> from 10-noon, it's one of the few things hard for me to move. I do really want to speak to the Cab Sec is there any other times?

I could move a few other things next week, except:

Tuesday – 3 to 4.3pm

Wednesday 3-3.30pm

Thursday 1.30 – 4.30pm

Also would do Friday. Same for Ivan on the 14<sup>th</sup>. Morning would be better but can accommodate.

Thanks

Tracy

**Tracy Black**

D: [REDACTED] | M: [REDACTED]

**From:** [REDACTED]

**Sent:** 29 September 2022 17:56

**To:** [REDACTED]; [REDACTED]

**Cc:** [REDACTED]; [REDACTED]; MailTo-Glasgow-Office [REDACTED]; [REDACTED]

**Subject:** RE: CBI and Ministerial Engagements

I am chasing them now there is a couple outstanding I should have them to you by tomorrow  
[REDACTED]

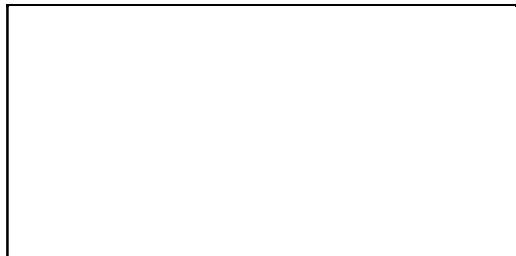
[REDACTED]

Events & Sponsorship Manager - Scotland, CBI

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D: [REDACTED] | M: [REDACTED]

CBI, Scotland, 3rd Floor, 160 West George Street, Glasgow, G2 2HQ





For issues with My CBI event registration [click here](#).

**From:** [REDACTED]

**Sent:** 29 September 2022 17:53

**To:** [REDACTED]

**Cc:** [REDACTED]; [REDACTED]; [REDACTED]; MailTo-Glasgow-Office [REDACTED]; [REDACTED]

**Subject:** CBI and Ministerial Engagements

Hi [REDACTED]

I've had an out of office from [REDACTED] and need to finalise a couple of engagement dates sooner rather than later. I've added in the [REDACTED] email address but it's worth saying we've had some bounce back emails on that address over the last few months now (See attached).

Just a couple of updates to engagement dates for consideration/ confirmation:

- **Deputy First Minister and Tracy, 5 October 2022** – with my sincere apologies for messing you about on this date, however, Mr Swinney now has to be in Parliament at the agreed time for the meeting (16:15-17:00). His office have asked if there is any chance that Tracy would have availability earlier in the day, **10:00-10:45** instead?
- **Mr McKee, next quarterly Meeting** – Mr McKee's office had 22 September in the calendar but I think [REDACTED] said that date wasn't in Tracy's diary so we needed to rearrange. We've since been advised there is a possibility of Friday 14 October (although this is a usually constituency day), however, the Minister's team are currently confirming whether something else can be rearranged to accommodate that. Does that date work for Tracy – I'm conscious she doesn't always work on a Friday?
- **Bute House reception for Invites for CBI Scottish Leader Mentoring Scheme 27 October** – I know [REDACTED] is on the case for this but we're keen to arrange for these invites to be issued as soon as possible. We're being chased for names so if we could have the final list by close tomorrow (Fri 30/9) that would be really helpful thank you.

I'll follow up separately on our 6-weekly conversation earlier this week.

Many thanks

[REDACTED]

[REDACTED] | Strategic Business Engagement Team Lead

Scottish Government | Covid Business Support and Strategic Engagement | Economic  
Strategy Directorate | 3rd Floor | 5 Atlantic Quay | 150 Broomielaw | Glasgow | G2 8LU

Mob: [REDACTED] | email: [REDACTED]

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Cannon Place, 78 Cannon Street, London EC4N 6HN  
Company number: RC000139

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Company number: RC000139

Document 9: Email - RE: CBI and Ministerial Engagements

**From:** [REDACTED]  
**Sent:** 30 September 2022 14:54  
**To:** [REDACTED]; Tracy Black [REDACTED]; [REDACTED]  
**Cc:** [REDACTED]; [REDACTED]  
**Subject:** RE: CBI and Ministerial Engagements

Thanks [REDACTED], appreciate the tight ministerial diaries.

We can make that time work at this end. If you're able to ping over a calendar invite with the details, that would be grand.

Thanks again – have a good weekend when it comes!

[REDACTED]

[REDACTED]

D: [REDACTED] | M: [REDACTED]

**From:** [REDACTED]  
**Sent:** 30 September 2022 14:37  
**To:** [REDACTED]; Tracy Black [REDACTED]; [REDACTED]  
**Cc:** [REDACTED]; [REDACTED]  
**Subject:** RE: CBI and Ministerial Engagements

Tracy

DFM's office is offering Wednesday 5 October 14:15 – 14:45 but noting that Mr Swinney can only do 30 minutes rather than 45. Parliamentary Business next week is making it challenging to fit in appointments for others with busy calendars, too.

If you are content with this/ can make it work happy to confirm that as soon as possible.

Many thanks

[REDACTED]

[REDACTED] | Strategic Business Engagement Team Lead  
Scottish Government | Strategic Business Engagement and Events | Economic Strategy  
Directorate | 3rd Floor | 5 Atlantic Quay | 150 Broomielaw | Glasgow | G2 8LU

Mob: [REDACTED] | email: [REDACTED]

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**From:** [REDACTED]  
**Sent:** 30 September 2022 10:07  
**To:** [REDACTED]; Tracy Black [REDACTED]; [REDACTED]  
**Cc:** [REDACTED]; [REDACTED]  
**Subject:** RE: CBI and Ministerial Engagements

Hi [REDACTED]

Many thanks. I've now reported my misreading error to DFM's office and will come back with revised options shortly (I hope!).

Thanks for confirming [REDACTED] will join the conversation.

[REDACTED]

[REDACTED] | Strategic Business Engagement Team Lead  
Scottish Government | Strategic Business Engagement and Events | Economic Strategy  
Directorate | 3rd Floor | 5 Atlantic Quay | 150 Broomielaw | Glasgow | G2 8LU

Mob: [REDACTED] | email: [REDACTED]

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**From:** [REDACTED]  
**Sent:** 30 September 2022 10:05  
**To:** [REDACTED]; Tracy Black [REDACTED]; [REDACTED]

**Cc:** [REDACTED]; [REDACTED]  
**Subject:** RE: CBI and Ministerial Engagements

Hi [REDACTED]

Just jumping in here, I'm afraid that's one of the times that Tracy can't move meetings – she has a board meeting at that point. Just re-pasting the times Tracy can't make next week:

Tuesday – 3 to 4.3pm

Wednesday 3-3.30pm

Thursday 1.30 – 4.30pm

Happy to keep it virtual, and it's likely that [REDACTED] will join the call too.

Thanks

[REDACTED]

[REDACTED]

D: [REDACTED] | M: [REDACTED]

**From:** [REDACTED]  
**Sent:** 30 September 2022 09:54  
**To:** Tracy Black [REDACTED]; [REDACTED]; [REDACTED]  
**Cc:** [REDACTED]; [REDACTED]  
**Subject:** RE: CBI and Ministerial Engagements

Hi Tracy

Deputy First Minister's office have just replied offering Thurs 6 Oct 13:30-14:15 – does that work?

We'll do the call virtually if that's okay (easier to fit in to everyone's busy diaries). Will anyone else join you on the call?

Many thanks

[REDACTED]

[REDACTED] | Strategic Business Engagement Team Lead  
Scottish Government | Strategic Business Engagement and Events | Economic Strategy  
Directorate | 3rd Floor | 5 Atlantic Quay | 150 Broomielaw | Glasgow | G2 8LU

Mob: [REDACTED] | email: [REDACTED]

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**Cc:** [REDACTED]; [REDACTED]  
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Many thanks and if I don't email before then, have a good weekend.

Kind regards

[REDACTED]

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Dear [REDACTED]

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**From:** [REDACTED]  
**Sent:** 29 September 2022 17:56  
**To:** [REDACTED]; [REDACTED]  
**Cc:** [REDACTED]; [REDACTED]; MailTo-Glasgow-Office [REDACTED]; [REDACTED]  
**Subject:** RE: CBI and Ministerial Engagements

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[REDACTED]

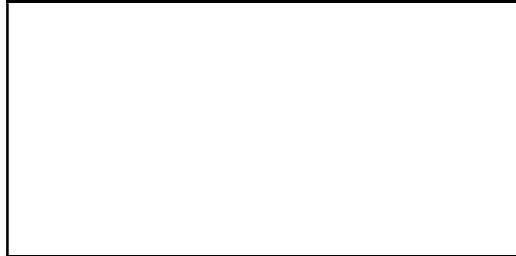
[REDACTED]

Events & Sponsorship Manager - Scotland, CBI

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D: [REDACTED] | M: [REDACTED]

CBI, Scotland, 3rd Floor, 160 West George Street, Glasgow, G2 2HQ



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**From:** [REDACTED]

**Sent:** 29 September 2022 17:53

**To:** [REDACTED]

**Cc:** [REDACTED]; [REDACTED]; [REDACTED]; MailTo-Glasgow-Office [REDACTED]; [REDACTED]

**Subject:** CBI and Ministerial Engagements

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Many thanks

[REDACTED]

[REDACTED] | Strategic Business Engagement Team Lead  
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Mob: [REDACTED] | email: [REDACTED]

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