



4 February 2025



Dear [REDACTED]

Thank you for your request made under the Official Information Act 1982 (OIA), received on 5 January 2025. You requested the following:

- *Inland Revenue Briefing Note BN2024/415: Response to Xero*

Information being released

I have decided to release the briefing note *Response to Xero* to you, enclosed as **Appendix A**.

This document is released subject to information being withheld under the following sections of the OIA, as applicable:

- 9(2)(a) – to protect the privacy of natural persons,
- 9(2)(ba)(i) – to protect information which is subject to an obligation of confidence or which any person has been or could be compelled to provide under the authority of any enactment, where the making available of the information would be likely to prejudice the supply of similar information, or information from the same source, and it is in the public interest that such information should continue to be supplied, and
- 9(2)(g)(i) – to maintain the effective conduct of the free and frank expression of opinions by or between or to Ministers of the Crown or members of an organisation or officers and employees of any public service agency or organisation in the course of their duty.

Information withheld in full

I have decided to withhold the attachment to briefing note in full under section 9(2)(g)(i) of the OIA.

As required by section 9(1) of the OIA, I have considered whether the grounds for withholding the information requested is outweighed by the public interest. In this instance, I do not consider that to be the case.

Right of review

If you disagree with my decision on your OIA request, you can ask an Inland Revenue review officer to review my decision. To ask for an internal review, please email the Commissioner of Inland Revenue at: commissionerscorrespondence@ird.govt.nz.

Alternatively, under section 28(3) of the OIA, you have the right to ask the Ombudsman to investigate and review my decision. You can contact the office of the Ombudsman by email at: info@ombudsman.parliament.nz.

If you choose to have an internal review, you can still ask the Ombudsman for a review.

Thank you again for your request.

Yours sincerely



Thomas Allen
Domain Lead, Governance and Ministerial Services

Briefing note

Reference: BN2024/415
Date: 29 October 2024
To: Revenue Advisor, Minister of Revenue – Angela Graham
Private Secretary, Minister of Revenue – Helen Kuy
Private Secretary, Minister of Finance – Emma Grigg
Copy to: Peter Mersi, Commissioner
Jane Elley, Acting Deputy Commissioner, Customer & Compliance Services
Joanne Petrie, Executive Support Advisor to the Commissioner
Carolyn Patchell, Management Support to Deputy Commissioner
Governance and Ministerial Services
From: Mark Tapara, External Relationship Manager
Subject: **Response to Xero**


Purpose

1. The purpose of the briefing note is to support the suggested response to Xero (attached) by the Minister of Revenue, Hon Simon Watts, regarding Xero's letter of feedback to him on 23rd September 2024.

Background and context

2. At a media event hosted by Xero on 26 July 2024, both the Minister of Finance, Hon Nicola Willis, and the Minister of Revenue were in attendance. As a result, Xero were provided with an opportunity to provide feedback to the Minister of Revenue on their relationship with us. Xero followed up with a letter to the Minister of Revenue. This briefing note provides the basis for our responses to all the feedback provided by Xero.
3. **Relationship with Inland Revenue** – We acknowledge Xero's feedback around the strong working relationship it has with us. Noting our engagement style, relationship management and contribution and involvement in the New Zealand Digital Advisory Group (NZDAG).
4. **Digital partnering** – We acknowledge Xero's concerns regarding s 9(2)(ba)(i)

s 9(2)(ba)(i), s 9(2)(g)(i)



s 9(2)(ba)(i), s 9(2)(g)(i)

5. s 9(2)(ba)(i), s 9(2)(g)(i)

6. **Tax Working Group** – This has been disestablished. However, implementation of changes throughout the tax year is now overseen by our formal Release Management Programme.

s 9(2)(g)(i)

7. s 9(2)(ba)(i)

8. **Executive strategy and connection** – We note and advise that Xero’s External Relationship Manager, Mr Mark Tapara, will continue to work with both internal and external interested parties to ensure a strategic connection.

9. **Next steps** – Develop and establish a connection between our leaders and Xero’s leaders.

Mark Tapara

External Relationship Manager

s 9(2)(a)