

Log of substantive contact between the Office for Budget Responsibility and Treasury Ministers and their Special Advisers and private office staff, between 27 October 2021 and 22 March 2022

Date	Which Ministers, Offices or Special Advisers?	Type of contact	Brief summary of discussion/purpose
23 December	Chancellor's office.	Email	Official request to begin the forecast process.
21 January	Chancellor's office and other Treasury officials.	Email	Note on the Round 1 economy forecast.
4 February	Chancellor's office and other Treasury officials.	Email	Note on the Round 1 fiscal forecast.
21 February	Chancellor's office and other Treasury officials.	Email	Note on the Round 2 economy and fiscal forecast.
4 March	Chancellor's office and other Treasury officials.	Email	Note on the Round 3 economy and fiscal forecast.
8 March	Chancellor's office and other Treasury officials.	Email	Note on the interim Round 4 economy and fiscal 'ready-reckoned' forecast.
18 March	Ministers, special advisers and officials (named below)	Email	Advance pre-release draft <i>EFO</i> chapters

### Exceptional pre-release access list

The Memorandum of Understanding (MoU) between the Office for Budget Responsibility, HM Treasury, the Department for Work & Pensions and HM Revenue & Customs contains guidance on the scope and purpose of exceptional pre-release access to our documents.

The terms of the MoU state that:

“The Treasury may request exceptional pre-release access greater than 24 hours to advanced drafts of OBR reports, which will be provided at the discretion of the OBR. Material provided on this basis will be restricted to a named list of Ministers, special advisors and/or officials. The OBR will publish the list of individuals that received the material, with the names of junior officials (below Senior Civil Service) withheld. The Treasury, DWP and HMRC will ensure that none of the content of the draft reports is released or briefed to the media or other outside persons before the OBR has published them.

The purpose of exceptional pre-release access on this basis is to allow departments to prepare ministerial statements, briefing and publications that will reflect and accompany the publication of an OBR report, where the department and the OBR agree that 24 hours would provide insufficient time to do so with sufficient guarantee of accuracy – for example because of the length or complexity of the report and/or the extent to which the department is likely to wish to refer to it in its own material. The most likely circumstances in which the OBR would grant such access is at Budgets and other fiscal statements, where somewhat earlier access to the *Economic and fiscal outlook (EFO)* is necessary to ensure the accuracy and relevance of the Treasury’s Budget document and the Chancellor’s accompanying statement to Parliament. In this instance, the OBR may provide draft *EFO* material a number of days in advance of it being finalised (typically on the Friday before a Wednesday statement).

During the time in which departments have exceptional pre-release access to OBR documents, the OBR is happy to receive factual comments (in line with paragraph 4.11 [of the MoU]), but it does not seek broader comments on the drafting of the document or the way in which analysis and conclusions have been described, which are matters for the OBR’s Budget Responsibility Committee. It is important to emphasise that the OBR will continue working on the report over subsequent days, so the final report may well differ considerably from that provided on exceptional pre-release for reasons that have nothing to do with any solicited or unsolicited input from departments. Hence the OBR also providing 24-hour pre-release of the final version.”

In accordance with those terms, the three lists below contain the people who received the draft version (either in full or in part) of the March 2022 *Economic and fiscal outlook* on 18 March:

#### **Ministers**

Chancellor of the Exchequer

Chief Secretary to the Treasury

#### **Special Advisers**

Douglas McNeill  
Nerissa Chesterfield  
Liam Booth-Smith  
Rupert Yorke

### **Treasury Officials**

Permanent Secretary – Tom Scholar  
Second Permanent Secretary – Charles Roxburgh  
Chief Economic Advisor – Clare Lombardelli  
Director General, Tax and Welfare – Beth Russell  
Director General, Public Spending and Finance – Catherine Little  
Director General, International and finance – Lindsey Whyte  
Director, Fiscal – Tom Josephs  
Director, Strategy, Planning and Budget – Dan York-Smith  
Director, Economics – James Benford  
Director, Personal Tax, Welfare and Pensions – Suzy Kantor/Chris Drane  
Director, Public Spending – Conrad Smewing  
Director, Climate, Environment and Energy – Steve Field  
Director, Ukraine Response – Kate Joseph  
Director, Growth and Infrastructure – Joanna Key  
Director, Business and International tax – Mike Williams  
Deputy Director, General Expenditure Policy – Johanna Harston  
Deputy Director, Fiscal Statistics and Policy – Ruth Curtice  
Deputy Director, Strategy, Planning and Budget – Sean Jones  
Deputy Director, Economic Assessment – Maeve Conolly  
Deputy Director, Welfare Spending and Reform – Rob Montanari  
Deputy Director, Macroeconomic Coordination and Strategy – Dan Gallagher  
Deputy Director, Debt and Reserves Management – Azin Roussos/Bruno Williams  
Deputy Director, Macroeconomic Policy – Neil McMurdo  
Deputy Director, Enterprise and Property Tax – Matthew Henty  
Deputy Director, Personal Tax – Laura Webster  
Deputy Director, VAT and Excise – Mike Cunningham  
Deputy Director, Labour Markets and Distributional Analysis – Tom Hemingway  
Deputy Director, Infrastructure, Digital and Culture – John Staples  
Deputy Director, Enterprise and Growth – Jon Fuller  
Deputy Director, Balance Sheet Analysis – Sue Connaughton  
Deputy Director, Ukraine Response – Yasmine Moezinia  
Official preparing briefing (economy) x4  
Official preparing briefing (economy forecast) x3  
Official preparing briefing (fiscal forecast) x5  
Official preparing briefing (fiscal policy) x2  
Official preparing briefing (fiscal briefing) x2  
Official preparing briefing (PSF)  
Official preparing briefing (macroeconomic policy)  
Official preparing briefing (balance sheet)  
Official preparing briefing (spending) x2

Official preparing briefing (policy costings) x3  
Official preparing briefing (presentational) x2  
Official preparing briefing (tax strategy) x3  
Official preparing briefing (NICs)  
Official preparing briefing (income tax, economics and receipts)  
Official preparing briefing (VAT and excise)  
Official preparing briefing (fuel duty)  
Official preparing briefing (distributional analysis)  
Official preparing briefing (energy sector)  
Official preparing briefing (Ukraine response)  
Official preparing briefing (cost of living)  
Official preparing briefing (households)

Head of Communications – David Pares

Head of Special Advisors Office

Press officer x4