

Log of substantive contact between the Office for Budget Responsibility and Treasury Ministers and their Special Advisers and private office staff, between 14 July 2020 and 24 November 2020

Date	Which Ministers, Offices or Special Advisers?	Type of contact	Brief summary of discussion/purpose
17 August	From: Chancellor's Office	Email	Informing the OBR of the window for publication of the forecast
11 September	From: Chancellor's Office	Email	Informing the OBR of the window for publication of the forecast
16 September	Chancellor, Treasury officials	Meeting	Introductory meeting between Richard Hughes and the Chancellor
16 September	Chancellor, Chancellor's office officials and other Treasury officials.	Email	Note on the first round economy forecast
30 September	Chancellor, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the first round fiscal forecast
6 October	Chancellor, Chancellor's Special Advisors Chancellor's office officials and other Treasury officials.	Meeting and forecast summary slides	Meeting to discuss the first round forecast
22 October	Chancellor, Chancellor's and CST's office officials, other Treasury officials.	Email	Round 2 economic and fiscal forecast note

28 October	Treasury officials	Email	Round 3 Economy forecast
6 November	Treasury officials	Email	Round 3 Fiscal forecast tables
20 November	Chancellor, Chancellor's office officials and other Treasury officials.	Meeting and forecast summary slides	To discuss the final round forecast
20 November	Chancellor, Chief Secretary, Chancellor's and CST's office officials, Special Advisers, other Treasury officials.	Email	Providing sections of the November 2020 Economic and fiscal outlook under agreed exceptional pre-release arrangements for the Chancellor and named officials (listed below).
24 November	Chancellor, Chief Secretary, Chancellor's and CST's office officials, Special Advisers, other Treasury officials.	Email	To provide 24 hours pre-release access to the November 2020 <i>Economic and fiscal outlook</i> .

### **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 November 2020 *Economic and fiscal outlook* on 20 March:

### **Ministers**

Chancellor of the Exchequer

Chief Secretary to the Treasury

### **Special Advisers**

Douglas McNeill

Nerissa Chesterfield

### **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, Fiscal – Tom Josephs

Director, Strategy, Planning and Budget – Dan York-Smith

Director, Economics – James Benford

Director, Personal Tax, Welfare and Pensions - Lindsey Whyte/Suzy Kantor

Director, Public Spending – Conrad Smewing

Deputy Director, General Expenditure Policy – Anthony Segal-Knowles

Deputy Director, Fiscal Statistics and Policy – Ruth Curtice

Deputy Director, Strategy, Planning and Budget – Ian Ginsberg

Deputy Director, Economic Assessment – Tom Pybus

Deputy Director, Welfare Spending and Reform – David Silk

Deputy Director, Macroeconomic Coordination and Strategy – Dan Gallagher

Deputy Director, Debt and Reserves Management – Mario Pisani

Deputy Director, Macroeconomic Policy – Chris Drane

Deputy Director, European Economics and Policy – Neil McMurdo

Deputy Director, Covid-19 Response – Jonny Medland/Alex Furse

Deputy Director, Labour Markets and Distributional Analysis – Tom Hemingway

Deputy Director, Covid Analysis and Scheme Team – Parag Vaghjiani

Deputy Director, Economic Risks – Dharmesh Nayee

Deputy Director, SEISS – Ruth Hopkinson

Head of Communications – Olaf Henricson-Bell

Official preparing briefing (economy) x4

Official preparing briefing (fiscal forecast) x5

Official preparing briefing (fiscal policy) x2

Official preparing briefing (spending) x2

Official preparing briefing (welfare)

Official preparing briefing (Brexit)

Official preparing briefing (Covid)

Official preparing briefing (Covid – labour market)

Official preparing briefing (policy costings) x3

Official preparing briefing (presentational)

Head of Special Advisors Office

Press officer