

Log of substantive contact between the Office for Budget Responsibility and Treasury Ministers and their Special Advisers and private office staff, between 12 March 2019 and 10 March 2020

Date	Which Ministers, Offices or Special Advisers?	Type of contact	Brief summary of discussion/purpose
12/07/2019	Chancellor, Treasury officials.	Email	To share preliminary outcomes from the <i>Fiscal risks</i> report.
12/08/2019	Chancellor	Telephone call	To discuss timing of the Autumn forecast.
15/08/2019	From: Chancellor's Office	Email	To request the commencement of the Autumn 2019 forecast process.
19/08/2019	To: Chancellor's Office	Email	To request the Brexit policy assumption on which to base the Autumn 2019 forecast.
02/09/2019	To: Chancellor's Office	Email	To confirm that we will proceed with sending the Round 1 economy forecast to departments based on policy assumptions discussed with Treasury officials.
03/09/2019	To: Chancellor's Office	Email	To confirm that we would not proceed with the Round 1 economy forecast and that we cannot proceed without further guidance on the Government's underlying policy assumptions.
17/09/2019	From: Chancellor's Office	Email	To request the commencement of the forecast process to be published on an unconfirmed date.
27/09/2019	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the first round economy forecast.

10/10/2019	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the first round fiscal forecast.
14/10/2019	From: Chancellor's Office	Email	To confirm the Budget date.
22/10/2019	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the second round economy and fiscal forecast.
25/10/2019	From: Chancellor's Office	Email	Confirming the cancellation of the November 2019 Budget.
20/12/2019	From: Chancellor's Office	Email	To commission a forecast for publication alongside the Budget.
13/01/2020	Chief Secretary	Meeting	Introductory meeting to discuss the role of the OBR.
15/01/2020	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the first round economy forecast.
30/01/2020	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the first round fiscal forecast.
14/02/2019	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the second round economy and fiscal forecast.
25/02/2020	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the third round economy and fiscal forecast.
26/02/2020	Chancellor, Special Advisers, Treasury officials.	Meeting	To discuss the economy and fiscal forecast.

27/02/2020	Chancellor, Treasury officials	Email	Letter on the OBR's second forecast in 2019-20.
05/06/2020	Chancellor	Email	Letter on fiscal rules for Budget 2020.
06/03/2020	Chancellor, Chief Secretary, Chancellor's and CST's office officials, Special Advisers, other Treasury officials.	Email	Providing a draft copy of the March 2019 Economic and fiscal outlook under agreed exceptional pre-release arrangements for the Chancellor and named officials (listed below).
10/03/2020	Chancellor, Chancellor's office officials, Special Advisers, other Treasury officials.	Email	To provide 24 hours pre-release access to the March 2020 Economic and fiscal outlook.

Log of contact between the Office for Budget Responsibility and the Shadow Chancellor of the Exchequer

17/10/2019	Shadow Chancellor	Meeting	To discuss opposition proposals for the OBR
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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 2020 *Economic and fiscal outlook* on 6 March:

Ministers

Chancellor of the Exchequer

Chief Secretary to the Treasury

Special Advisors

Douglas McNeill

Rob Oxley

Nerissa Chesterfield

Liam Booth-Smith

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 – James Bowler

Director, Fiscal – Tom Josephs

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

Director, Economics – Vanessa MacDougall

Director, Personal Tax, Welfare and Pensions - Lindsey Whyte

Director, Public Spending – Conrad Smewing

Head of Communications – Olaf Henricsson-Bell

Deputy Director, General Expenditure Policy – Anthony Segal-Knowles

Deputy Director, Fiscal Statistics and Policy – Chris Drane

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

Official preparing Budget document (economy)

Official preparing Budget document (Fiscal)

Official preparing briefing (economy) x4

Official preparing briefing (fiscal forecast) x3

Official preparing briefing (fiscal policy)

Official preparing briefing (spending) x2

Official preparing briefing (welfare)

Official preparing briefing (EU Budget)

Official preparing briefing (policy costings) x2

Official preparing briefing (presentational) x2

Press officer