

Log of substantive contact between the Office for Budget Responsibility and Treasury Ministers, Special Advisers and their private office staff between 16 March 2016 and 22 November 2016

| Date | Which Ministers, Offices or Special Advisers? | Type of contact | Brief summary of discussion/purpose |
|------------|---|-----------------|--|
| 27/07/2016 | Chancellor, Chancellor's office officials and other Treasury officials. | Meeting | Introductory meeting with new Chancellor |
| 01/09/2016 | Damian Green, Secretary of State for Work and Pensions | Lunch | Introductory meeting with new Secretary of State |
| 06/10/2016 | Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials. | Email | Note on the first round economy forecast |
| 18/10/2016 | Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials | Email | Note on the first round fiscal forecast |
| 31/10/2016 | Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials | Email | Note on the second round economy and fiscal forecast |
| 04/11/2016 | Chancellor, Chancellor's office officials, special adviser, other Treasury officials | Meeting | To discuss the economy and fiscal forecast |
| 09/11/2016 | Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials | Email | Note on the third round economy and fiscal forecast |
| 18/11/2016 | Chancellor, Chief Secretary, Chancellor's and CST's office officials, special advisers, other Treasury officials. | Email | Providing a draft copy of the November 2016 <i>Economic and fiscal outlook</i> under agreed exceptional pre-release arrangements for the Chancellor and named officials (listed below) |
| 22/11/2016 | 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 2016 <i>Economic and fiscal outlook</i> and supporting documents |

Exceptional pre-release access list

The Memorandum of Understanding between the Office for Budget Responsibility, HM Treasury, the Department for Work & Pensions and HM Revenue & Customs is in the process of being updated. For this Autumn Statement and *Economic and fiscal outlook* process, the signatories agreed new terms for exceptional pre-release access to the OBR's documents ahead of publication. These terms state that:

In line with the ONS arrangements, the Treasury may request exceptional pre-release access to earlier draft materials from 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 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 most likely circumstances in which the OBR would grant such access is at Budgets and Autumn Statements, where early access to the OBR's Economic and fiscal outlook (EFO) is necessary to ensure the accuracy and relevance of the Treasury's Budget or Autumn Statement document and the Chancellor's accompanying statement to Parliament. In this instance, the OBR will provide draft EFO material a number of days in advance of it being finalised (typically on the Friday before a Wednesday statement). 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. Hence the OBR also providing 24-hour pre-release of the final version.

In accordance with those terms, the list of people who received the draft version (either in full or in part) of the November 2016 *Economic and fiscal outlook* on 18 November are:

Ministers

Chancellor of the Exchequer

Chief Secretary to the Treasury

Officials

Permanent Secretary – Tom Scholar

Second Permanent Secretary – Charles Roxburgh

Director General – Chief Economic Adviser – Sir Dave Ramsden

Director General, Tax and Welfare – James Bowler

Director General, Public Spending and Finance – Julian Kelly

Director, Fiscal – Richard Hughes

Director, Strategy, Planning and Budget – Clare Lombardelli

Director, Personal Tax, Welfare and Pensions – Beth Russell

Deputy Director, Fiscal Statistics and Policy – Chris Drane

Deputy Director, Strategy, Planning and Budget – Richard Williams

Deputy Director, Economic Assessment – Stephen Farrington

Deputy Director, General Expenditure Policy – Stuart Glassborow

Deputy Director, Welfare Spending and Reform – David Silk

Deputy Director, Macroeconomic Co-ordination and Strategy – Dan Gallagher

Official preparing Autumn Statement document (economy)

Official preparing Budget document (fiscal)

Official preparing briefing (economy)

Official preparing briefing (fiscal forecast)

Official preparing briefing (fiscal forecast)

Official preparing briefing (fiscal forecast)

Official preparing briefing (fiscal policy)

Official preparing briefing (fiscal policy)

Official preparing briefing (spending)

Official preparing briefing (spending)

Official preparing briefing (spending)

Official preparing briefing (welfare)

Official preparing briefing (policy costings)

Duty Press Officers

Head of communications – Dan York-Smith

Press officer

Press officer

Special Advisors

Poppy Trowbridge

Karen Ward

Graham Hook