

Log of substantive contact between the Office for Budget Responsibility and Treasury Ministers and their Special Advisers and private office staff, and members of the Shadow Cabinet, between 8 March 2017 and 21 November 2017

Date	Which Ministers, Offices or Special Advisers?	Type of contact	Brief summary of discussion/purpose
27/03/2017	John McDonnell, Shadow Chancellor.	Meeting	Discuss the role of the OBR
06/07/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Providing a summary of the main conclusions of the July 2017 <i>Fiscal risks report</i> under agreed exceptional pre-release arrangements for the Chancellor and named officials
10/07/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Providing a draft copy of the July 2017 <i>Fiscal risks report</i> under agreed exceptional pre-release arrangements for the Chancellor and named officials (listed below).
12/07/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	To provide 24 hours pre-release access to the July 2017 <i>Fiscal risks report</i> and supporting documents.
06/10/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Providing a draft copy of the October 2017 <i>Forecast evaluation report</i> under agreed exceptional pre-release arrangements for the Chancellor and named officials (listed below).
06/10/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other	Email	Note on the first round economy forecast of the November 2017 <i>Economic and fiscal outlook</i> .

	Treasury officials.		
09/10/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	To provide 24 hours pre-release access to the October 2017 <i>Forecast evaluation report</i> and supporting documents.
18/10/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the first round fiscal forecast of the November 2017 <i>Economic and fiscal outlook</i> .
30/10/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the second round economy and fiscal forecast of the November 2017 <i>Economic and fiscal outlook</i> .
09/11/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the third round economy and fiscal forecast of the November 2017 <i>Economic and fiscal outlook</i> .
17/11/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, Special Advisers, other Treasury officials.	Email	Providing a draft copy of the March 2017 <i>Economic and fiscal outlook</i> under agreed exceptional pre-release arrangements for the Chancellor and named officials (listed below).
21/11/2017	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 March 2017 <i>Economic and fiscal outlook</i> and supporting documents.

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 has been updated and now contains additional guidance on the scope and purpose of exceptional pre-release access to our documents.

The terms of the new 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 2017 *Economic and fiscal outlook* on 17 November, the October 2017 *Forecast evaluation report* on 6 October and the July 2017 *Fiscal risks report* on 10 July:

November 2017 *Economic and fiscal outlook*

Ministers

Chancellor of the Exchequer

Chief Secretary to the Treasury

Officials

Permanent Secretary – Tom Scholar

Second Permanent Secretary – Charles Roxburgh
Director General, Tax and Welfare – Beth Russell
Director General, Public Spending and Finance – James Bowler
Director, Fiscal and acting Chief Economic Advisor – Richard Hughes
Director, Strategy, Planning and Budget – Clare Lombardelli
Director, Economics – Vanessa MacDougall
Director, Public Spending – Jane Cunliffe
Deputy Director, General Expenditure Policy – Anthony Segal-Knowles
Deputy Director, Fiscal Statistics and Policy – Chris Drane
Deputy Director, Strategy, Planning and Budget – Richard Williams
Deputy Director, Economic Assessment – Stephen Farrington
Deputy Director, Welfare Spending and Reform – David Silk
Deputy Director, Macroeconomic Coordination and Strategy – Dan Gallagher
Official preparing Budget document (economy)
Official preparing Budget document (fiscal)
Official preparing briefing (economy)
Official preparing briefing (economy)
Official preparing briefing (economy)
Official preparing briefing (economy)
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 (spending)
Official preparing briefing (spending)
Official preparing briefing (housing associations)
Official preparing briefing (welfare)
Official preparing briefing (EU Budget)
Official preparing briefing (policy costings)
Official preparing briefing (policy costings)

Duty Press Officers

Head of communications – Will Garton
Press officer
Press officer

Special Advisors

Poppy Trowbridge
Duncan McCourt
Steffan Ball

October 2017 Forecast evaluation report

Ministers

Chancellor of the Exchequer

Officials

Permanent Secretary – Tom Scholar

Second Permanent Secretary – Charles Roxburgh

Director General, Chief Economic Adviser – Richard Hughes

Director, Economics Group – Vanessa MacDougall

Deputy Director, Fiscal Statistics and Policy – Chris Drane

Deputy Director, Economic Assessment – Stephen Farrington

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

Official preparing briefing (economy)

Official preparing briefing (economy)

Official preparing briefing (fiscal forecast)

Official preparing briefing (fiscal forecast)

Official preparing briefing (fiscal forecast)

Special Advisors

Tim Pitt

Giles Winn

Duty Press Officers

Head of Communications – Will Garton

Press officer

Press officer

July 2017 Fiscal risks report

Ministers

Chancellor of the Exchequer

Chief Secretary to the Treasury

Special advisers

Special Advisor – Poppy Trowbridge

Special Advisor – Karen Ward

Special Advisor – Kane Daniell

Officials

Permanent Secretary – Tom Scholar

Second Permanent Secretary – Charles Roxburgh

Director General, Chief Economic Adviser – Dave Ramsden

Director General, Public Spending – James Bowler

Director, Fiscal – Richard Hughes

Director, Strategy, Planning and Budget – Clare Lombardelli
Director, 'Personal Tax Welfare and Pensions – Beth Russell
Director, Public Spending – Jane Cunliffe
Deputy Director, Fiscal Statistics and Policy – Chris Drane
Deputy Director, Debt & Reserves Management – Mario Pisani
Deputy Director, Strategy, Planning and Budget – Richard Williams
Deputy Director, Welfare Spending & Reform – David Silk
Deputy Director, Pensions and Savings – David Thomas
Deputy Director, Enterprise and Growth – Jon Sell
Deputy Director, Local Government and Reform – Kate Atkinson
Deputy Director, Macroeconomic coordination and strategy – Daniel Gallagher
Deputy Director, Financial Stability – Johanna Cowan
Deputy Director, Resilience and Resolution – Robert Kramer
Deputy Director, General Expenditure Policy – Anthony Segal-Knowles
Official preparing briefing (stress test)
Official preparing briefing (fiscal risk)
Official preparing briefing (fiscal risk)
Official preparing briefing (fiscal risk)
Official preparing briefing (economy)
Official preparing briefing (tax risks)
Official preparing briefing (tax risks)
Official preparing briefing (financial stability)
Official preparing briefing (financial resolution)
Official preparing briefing (spending)
Official preparing briefing (health and social care)
Official preparing briefing (clinical negligence)
Official preparing briefing (welfare)
Official preparing briefing (state pensions)
Official preparing briefing (nuclear decommissioning)
Official preparing briefing (local authorities)
Official preparing briefing (tax litigation)
Official preparing briefing (balance sheet)
Official preparing briefing (debt interest/APF)
Official preparing briefing (housing associations)
Official preparing briefing (student loans)
Official preparing briefing (financial asset sales)
Official preparing briefing (housing schemes)

Duty press officers

Head of Communications – Will Garton
Press officer – Jenny Gray
Press officer – Alexander Fitzgerald