

Log of substantive contact between the Office for Budget Responsibility and Treasury Ministers, Special Advisers and their private office staff between 23 November 2016 and 7 March 2017

Date	Which Ministers, Offices or Special Advisers?	Type of contact	Brief summary of discussion/purpose
24/01/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the first round economy forecast.
03/02/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the first round fiscal forecast.
16/02/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the second round economy and fiscal forecast.
27/02/2017	Chancellor, Chief Secretary, Chancellor's and CST's office officials, other Treasury officials.	Email	Note on the third round economy and fiscal forecast.
28/02/2017	Chancellor, Special Adviser Chancellor's office officials, other Treasury officials.	Meeting with the BRC	To discuss the economy and fiscal forecast.
03/03/2017	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).
07/03/2017	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 list of people who received the draft version (either in full or in part) of the *March 2017 Economic and fiscal outlook* on 3 March 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  
Director, Public Spending – Jane Cunliffe  
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 (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 (spending)  
Official preparing briefing (personal tax)  
Official preparing briefing (EU Budget)  
Official preparing briefing (policy costings)

#### **Duty Press Officers**

Head of communications – Will Garton  
Press officer  
Press officer

#### **Special Advisors**

Poppy Trowbridge  
Karen Ward  
Graham Hook