

Log of substantive contact between the Office for Budget Responsibility and Treasury Ministers and their Special Advisers and private office staff, between 17 November 2022 and 14 March 2023

Date	Which Ministers, Offices or Special Advisers?	Type of contact	Brief summary of discussion/purpose
19 December	Chancellor's office.	Email	Official request to begin the forecast process.
19 January	Chancellor's office and other Treasury officials.	Email	Note on the Round 1 economy forecast.
25 January	Chancellor, special adviser, Chancellor's office and other Treasury officials.	Meeting	To discuss the forecast and policy package.
1 February	Chancellor's office and other Treasury officials.	Email	Note on the Round 1 fiscal forecast.
6 February	Chancellor's office and other Treasury officials.	Email	Note on the Round 2 economy forecast.
7 February	Chancellor, special adviser, Chancellor's office and other Treasury officials.	Meeting	To discuss the forecast and policy package.
15 February	Chancellor's office and other Treasury officials.	Email	Note on the Round 2 fiscal forecast.
20 February	Chancellor, special adviser, Chancellor's office and other Treasury officials.	Meeting	To discuss the forecast and policy package.
24 February	Chancellor's office and other Treasury officials.	Email	Note on the Round 3 economy and fiscal forecast.

1 March	Chancellor's office and other Treasury officials.	Email	Note on the interim Round 4 economy and fiscal 'ready-reckoned' forecast.
8 March	Chancellor, special adviser, Chancellor's office and other Treasury officials.	Meeting	To discuss the forecast and policy package.
10 March	Ministers, special advisers and officials (named below)	Email	Advance pre-release draft <i>EFO</i> chapters

### **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 (94) people who received the draft version (either in full or in part) of the March 2023 *Economic and fiscal outlook* on 10 March:

### **Ministers**

Chancellor of the Exchequer

Chief Secretary to the Treasury

### **Special Advisers**

Adam Smith

Adam Memon

Simon Finkelstein

### **Treasury Officials**

Permanent Secretary – James Bowler

Second Permanent Secretary – Catherine Little

Second Permanent Secretary – Beth Russell

Chief Economic Advisor – Clare Lombardelli

Director General, International and finance – Lindsey Whyte

Director General, Growth and productivity – Philip Duffy

Director General, Tax and Welfare – Dan York-Smith

Director, Fiscal – Ruth Curtice

Director, Economics – Daniel Gallagher

Directors, Personal Tax, Welfare and Pensions – Suzy Kantor/Vanessa McDougall

Director, Public Spending – Nick Donlevy

Directors, Business and International tax – Mike Williams/Helen Dickinson

Director, Growth and Infrastructure – Joanna Key

Director, Climate, Environment and Energy – Steve Field

Deputy Director, General Expenditure Policy – Kara Towers

Deputy Director, Fiscal Statistics and Policy – Victoria Ogden

Deputy Director, Strategy, Planning and Budget – Sean Jones

Deputy Director, Economic Assessment – Aishani Roy

Deputy Director, Welfare Spending and Reform – Marcus Mason

Deputy Director, Macroeconomic Coordination and Strategy – Tom Hemingway

Deputy Director, Debt and Reserves Management – Kripali Manek

Deputy Director, Macroeconomic Policy – Neil McMurdo

Deputy Director, Personal Tax – Laura Webster

Deputy Director, Corporation Tax – Timothy Power

Deputy Director, VAT and Excise – Mike Cunningham

Deputy Director, Enterprise and Property Tax – Matthew Henty

Deputy Directors, Labour Markets and Distributional Analysis – Nicolas Broadway/Parag Vaghjiani

Deputy Director, Enterprise and Growth – Jon Fuller

Deputy Director, Energy Response – Jonathan Edwards

Deputy Director, Balance Sheet Analysis – Sue Connaughton

Deputy Director, Energy and Transport Tax – Jenny Rowlands

Deputy Director, Special Situations – Emily Braid

Deputy Director, Pensions and Savings – Louise Tinsley

Official preparing briefing (economy) x4  
Official preparing briefing (economy forecast) x4  
Official preparing briefing (fiscal forecast) x4  
Official preparing briefing (fiscal policy) x2  
Official preparing briefing (fiscal briefing) x2  
Official preparing briefing (fiscal)  
Official preparing briefing (PSF)  
Official preparing briefing (macroeconomic policy)  
Official preparing briefing (balance sheet)  
Official preparing briefing (spending) x3  
Official preparing briefing (policy costings) x2  
Official preparing briefing (presentational)  
Official preparing briefing (tax)  
Official preparing briefing (tax strategy)  
Official preparing briefing (Labour supply) x5  
Official preparing briefing (NICs)  
Official preparing briefing (personal tax)  
Official preparing briefing (income tax)  
Official preparing briefing (VAT)  
Official preparing briefing (welfare) x2  
Official preparing briefing (pensions and savings)  
Official preparing briefing (capital allowance) x2  
Official preparing briefing (energy) x3  
Official preparing briefing (distributional analysis)  
Official preparing briefing (households)  
Head of Communications – David Pares  
Head of Special Advisors Office  
Press officer x4