Log of substantive contact between the Office for Budget Responsibility and Treasury Ministers and their Special Advisers and private office staff, between 25 November 2020 and 2 March 2021

<table>
<thead>
<tr>
<th>Date</th>
<th>Which Ministers, Offices or Special Advisers?</th>
<th>Type of contact</th>
<th>Brief summary of discussion/purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 January</td>
<td>Chancellor, Chancellor’s office officials and other Treasury officials.</td>
<td>Email</td>
<td>Note on the Round 1 economy forecast</td>
</tr>
<tr>
<td>3 February</td>
<td>Chancellor, Chancellor’s and CST’s office officials, other Treasury officials.</td>
<td>Email</td>
<td>Note on the Round 1 fiscal forecast</td>
</tr>
<tr>
<td>11 February</td>
<td>Chancellor, Chancellor’s office officials and other Treasury officials.</td>
<td>Meeting</td>
<td>To discuss the emerging forecast</td>
</tr>
<tr>
<td>12 February</td>
<td>Treasury officials</td>
<td>Email</td>
<td>Preliminary Round 2 fiscal forecast tables</td>
</tr>
<tr>
<td>17 February</td>
<td>Chancellor, Chancellor’s and CST’s office officials, other Treasury officials.</td>
<td>Email</td>
<td>Note on the Round 2 forecast</td>
</tr>
<tr>
<td>23 February</td>
<td>Treasury officials</td>
<td>Email</td>
<td>Round 3 economy forecast</td>
</tr>
<tr>
<td>26 February</td>
<td>Treasury officials</td>
<td>Email</td>
<td>Round 3 fiscal forecast tables</td>
</tr>
</tbody>
</table>
**Meetings with members of Her Majesty’s Opposition**

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Meeting</th>
<th>Role Discussed</th>
</tr>
</thead>
<tbody>
<tr>
<td>28 January</td>
<td>Shadow Chancellor of the Exchequer</td>
<td></td>
<td>To discuss the role of the OBR</td>
</tr>
</tbody>
</table>

**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 2021 *Economic and fiscal outlook* on 26 February:
Ministers
Chancellor of the Exchequer
Chief Secretary to the Treasury

Special Advisers
Douglas McNeill
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 – Catherine Little
Director, Fiscal – Tom Josephs
Director, Strategy, Planning and Budget – Dan York-Smith
Director, Economics – James Benford
Director, Personal Tax, Welfare and Pensions - Lindsey Whyte/Suzy Kantor
Director, Public Spending – Conrad Smewing
Director, COVID Response – Kate Joseph
Director, Business tax – Mike Williams
Deputy Director, General Expenditure Policy – Johanna Harston
Deputy Director, Fiscal Statistics and Policy – Ruth Curtice
Deputy Director, Strategy, Planning and Budget – Ian Ginsberg
Deputy Director, Economic Assessment – Maeve Conolly
Deputy Director, Welfare Spending and Reform – Joe Randall
Deputy Director, Macroeconomic Coordination and Strategy – Dan Gallagher
Deputy Director, Debt and Reserves Management – Mario Pisani/Adin Roussos
Deputy Director, Macroeconomic Policy – Chris Drane
Deputy Director, European Economics and Policy – Neil McMurdo
Deputy Director, Covid-19 Response – Jonny Medland/Alex Furse
Deputy Director, Labour Markets and Distributional Analysis – Tom Hemingway
Deputy Director, SEISS – Ruth Hopkinson
Deputy Director, CJRS – Rob Montanari
Deputy Director, Business Tax – Matthew Henty
Deputy Director, Corporate tax – Timothy Power
Deputy Director, Personal tax – Laura Webster
Head of Communications – Olaf Henricson-Bell

Head of Special Advisors Office
Press officer x3
Official preparing briefing (economy) x5
Official preparing briefing (fiscal forecast) x5
Official preparing briefing (fiscal policy) x5
Official preparing briefing (spending) x2
Official preparing briefing (welfare)
Official preparing briefing (macroeconomic policy)
Official preparing briefing (Covid) x3
Official preparing briefing (policy costings) x3
Official preparing briefing (presentational) x2
Official preparing briefing (business tax) x2
Official preparing briefing (personal tax)