

Log of substantive contact between the Office for Budget Responsibility and Treasury Ministers and their Special Advisers and private office staff, between 7 July 2022 and 16 November 2022

Date	Which Ministers, Offices or Special Advisers?	Type of contact	Brief summary of discussion/purpose
6 September	To: Chancellor's office, Treasury officials	Email	Round 1 forecast
7 September	From: Chancellor's office	Email	Confirming the OBR would not be commissioned to publish forecast alongside Growth Plan
26 September	From: Chancellor's office	Email	Requesting a forecast to be published on 23 November
29 September	To: Chancellor's office, Treasury officials	Email	Confirming our plan to publish the timetable of forecast rounds and that we could deliver a request for an expedited Round 2 on 7 October
30 September	Prime Minister, Chancellor, No.10 officials, Treasury officials, special advisers	Meeting	To discuss the latest forecast
5 October	From: Chancellor's office	Email	Confirming a request for an update on the emerging forecast on 7 October
7 October	To: Chancellor's office, Treasury officials	Email	Round 2 forecast

10 October	Chancellor, Treasury officials, special advisers	Meeting	To discuss the latest forecast
11 October	From: Chancellor's office	Email	Confirming forecast timing brought forward to 31 October
17 October	Chancellor, Treasury officials, special advisers	Meeting	To discuss the latest forecast
18 October	To: Chancellor's office, Treasury officials	Email	Round 3 forecast
25 October	To: Chancellor's office, Treasury officials	Email	Round 4 forecast
26 October	From: Chancellor's office	Email	Confirming forecast timing pushed back to 17 November
4 November	To: Chancellor's office, Treasury officials	Email	Round 5 forecast
10 November	To: Treasury officials	Email	Round 6 forecast
13 November	To: Treasury officials	Email	Round 7 forecast
11 November	To: Treasury officials (see list below)	Email	Pre-release draft <i>EFO</i>

12 November	From: Chancellor	Letter	Confirming final detail of the fiscal targets
16 November	To: Treasury officials	Email	Final <i>EFO</i>
16 November	Chancellor	Meeting	Meeting with Richard Hughes to discuss the final forecast

Meetings with members of His Majesty's Opposition

11 October	Shadow Chancellor of the Exchequer	Meeting	To discuss fiscal issues
------------	------------------------------------	---------	--------------------------

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 (87) people who received the draft version (either in full or in part) of the November 2022 *Economic and fiscal outlook* on 11 November:

Ministers

Chancellor of the Exchequer

Chief Secretary to the Treasury

Special Advisers

Adam Smith

Christina Robinson

Adam Memon

Kristen Mcleod

Treasury Officials

Permanent Secretary – James Bowler

Second Permanent Secretary – Catherine Little

Second Permanent Secretary – Beth Russell

Chief Economic Advisor – Clare Lombardelli

Director General, Tax and Welfare – Lindsey Whyte

Director General, Public Spending and Finance – Phillip Duffy

Director, Fiscal – Ruth Curtice

Director, Strategy, Planning and Budget – Dan York-Smith

Director, Economics – James Benford

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

Director, Public Spending – Conrad Smewing

Director, Business and International Tax – Mike Williams

Director, Growth and Infrastructure – Joanna Key

Director, Climate, Environment and Energy – Steve Field

Director, Customs, Business and International Tax – Sue Catchpole

Deputy Director, General Expenditure Policy – Kara Towers / Marcus Mason

Deputy Director, Fiscal Statistics and Policy – Dan Gallagher

Deputy Director, Budget and Finance Bill – Sean Jones

Deputy Director, Macroeconomic Assessment – Aishani Roy

Deputy Director, Welfare Spending & Reform – Chris Drane
Deputy Director, Macroeconomic Coordination and Strategy – Bruno Williams
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 Director, Labour Markets and Distributional Analysis – Nicolas Broadway
Deputy Director, Enterprise and Growth – Jon Fuller
Deputy Director, Energy Response Team – Jonathan Edwards
Deputy Director, Balance Sheet Analysis – Sue Connaughton
Deputy Director, Energy and Transport Tax – Jenny Rowlands
Deputy Director, Special Situations – Emily Braid

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) x3
Official preparing briefing (fiscal public sector finances)
Official preparing briefing (Fiscal Balance Sheet)
Official preparing briefing (macroeconomic policy)
Official preparing briefing (spending) x4
Official preparing briefing (policy costings) x3
Official preparing briefing (presentational) x2
Official preparing briefing (tax strategy)
Official preparing briefing (NICs)
Official preparing briefing (personal tax)
Official preparing briefing (income tax)
Official preparing briefing (welfare) x2
Official preparing briefing (energy) x3
Official preparing briefing (households)
Official preparing briefing (distributional analysis)

Head of Communications – David Pares
Head of Special Advisors Office
Press officer x4