

Log of substantive contact between the Office for Budget Responsibility and Ministers and their Special Advisers and private office staff, and Shadow Cabinet, between 12 September and 29 October 2024

Date	Which Ministers, Offices or Special Advisers?	Type of contact	Brief summary of discussion/purpose
19 September	Chancellor, Chancellor's office and other Treasury officials	Email	Note on the Round 1 fiscal forecast
3 October	Chancellor, special advisor, Chancellor's office, and other Treasury officials	Meeting	To discuss forecast developments
8 October	Treasury officials	Email	Pre-release of final <i>Forecast evaluation report</i> and <i>Welfare trends report</i>
8 October	Chancellor, Chancellor's office and other Treasury officials	Email	Note on the Round 2 economy and fiscal forecast
14 October	Chancellor, Chancellor's office and other Treasury officials	Email	Note on the Round 3 economy and fiscal forecast
15 October	Special advisor, Treasury officials	Meeting	To discuss the forecast and policy package
17 October	Chancellor's office	Email	Letter on changes to the fiscal rules
23 October	Chancellor, special advisor, Chancellor's office, and other Treasury officials	Meeting	To discuss the forecast and policy package
25 October	Chancellor, special advisor, Chancellor's office, and other Treasury officials	Email	Advance pre-release draft of <i>EFO</i> chapters
28 October	Treasury officials	Email	Final <i>EFO</i> document

Shadow Cabinet

25 October	From: Shadow Chancellor of the Exchequer	Email	Regarding the OBR's review into the March 2024 forecast for departmental expenditure limits
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27 October	To: Shadow Chancellor of the Exchequer	Email	Regarding the OBR's review into the March 2024 forecast for departmental expenditure limits
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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.

In accordance with those terms, the three lists below contain the 111 people who received the draft version (either in full or in part) of the October 2024 *Economic and fiscal outlook* on 25 October September:

Ministers

Chancellor of the Exchequer
Chief Secretary to the Treasury
Financial Secretary to the Treasury
Exchequer Secretary to the Treasury

Special Advisers

Katie Martin
John Van Reenen
Spencer Thompson
Neil Amin-Smith
Rhodri Thomas
Anna Valero

Treasury Officials

Permanent Secretary – James Bowler
Chief Economic Advisor and Second Permanent Secretary – Sam Beckett
Second Permanent Secretary – Beth Russell
Director General, Tax and Welfare – Dan York-Smith
Director General, Public Spending – Conrad Smewing
Director General Growth and Productivity – Jessica Glover
Director, Fiscal – Ruth Curtice
Director, Economics – Dan Gallagher
Director, Personal Tax, Welfare and Pensions – Laura Webster/Vanessa MacDougall
Director, Public Spending – Nick Donlevy
Director, Business and International Tax – Helen Dickinson
Director, Climate, Environment and Energy – Steve Field
Director, Strategy, Planning and Budget – William MacFarlane
Director, Enterprise and Growth – Stuart Glassborow
Co-Deputy Directors, General Expenditure Policy – Jazmin Glassborow / Will Davis
Deputy Director, Fiscal Statistics and Policy – Jennifer Gray
Deputy Director, Budget and Finance Bill – Jonny Medland
Co-Deputy Directors, Macroeconomic Assessment – Orla May / Alison Massey

Deputy Director, Welfare Spending & Reform – Marcus Mason
Deputy Director, Macroeconomic Coordination and Strategy – Tom Hemingway
Deputy Director, Macroeconomic Policy – Neil McMurdo
Co-Deputy Directors, Debt and Reserves Management – Azin Roussos/Kripali Manek
Deputy Director, Personal Tax – Jonny Halls
Deputy Director, VAT and Excise – Scarlett Graham
Deputy Director, Enterprise and Property Tax – Matthew Henty
Deputy Director, Labour Markets and Distributional Analysis – Nicholas Broadway
Deputy Director, Labour Markets, Human Capital, Supply and Regions – Tom Pybus
Deputy Director, Pensions and Savings – Paul Randle
Deputy Director, Trade Policy – Catherine Stewart
Deputy Director, National Wealth Fund – Neeraj Patel
Deputy Director, Tax Administration, Spending and Reform – John Mundy
Deputy Director, Balance Sheet Analysis – Sue Connaughton
Deputy Director, Infrastructure, Labour markets & migration – Linda Timson
Deputy Director, Energy and Transport Tax – Juliet Palfrey

Official preparing briefing (Economy forecast/indirect effects) x2
Official preparing briefing (Economy forecast) x1
Official preparing briefing (Economy) x7
Official preparing briefing (Labour supply) x1
Official preparing briefing (Fiscal forecast) x7
Official preparing briefing (Fiscal policy) x3
Official preparing briefing (Fiscal public sector finances) x1
Official preparing briefing (Macroeconomic policy) x2
Official preparing briefing (Balance sheet) x2
Official preparing briefing (Spending) x3
Official preparing briefing (Spending analysis) x1
Official preparing briefing (AME spending) x1
Official preparing briefing (Spending policy) x1
Official preparing briefing (Scorecard and costings) x2
Official preparing briefing (Policy costings) x2
Official preparing briefing (Presentational) x1
Official preparing briefing (Policy and presentational) x2
Official preparing briefing (Tax) x2
Official preparing briefing (Tax strategy) x1
Official preparing briefing (NICs) x1
Official preparing briefing (Personal Tax Strategy) x1
Official preparing briefing (Personal Tax Economics) x1
Official preparing briefing (IHT, Non-Doms) x1
Official preparing briefing (Labour Supply) x1
Official preparing briefing (Welfare) x1
Official preparing briefing (Welfare AME Spending) x1
Official preparing briefing (Pensions) x1
Official preparing briefing (Pensions savings tax) x1

Official preparing briefing (Tax gap) x1
Official preparing briefing (VAT) x1
Official preparing briefing (Excise) x1
Official preparing briefing (Transport tax) x1
Official preparing briefing (Fuel duty) x1
Official preparing briefing (Trade analysis) x1
Press officer x4
Head of Special Advisors Office x2