

Log of substantive contact between the Office for Budget Responsibility and Treasury Ministers and their Special Advisers and private office staff, between 23 March 2022 and 6 July 2022

Date	Which Ministers, Offices or Special Advisers?	Type of contact	Brief summary of discussion/purpose
27 June	Chancellor, Treasury officials	Email	A draft summary of <i>FRS</i> conclusions
29 June	Exchequer Secretary, Private office staff	Phone call and Email	Renewing sponsorship in order to lay reports in Parliament
1 July	Chancellor, Treasury officials	Email	A near-final summary of <i>FRS</i> conclusions
4 July	Ministers, special advisers and officials (named below)	Email	Advance pre-release copy of the <i>FRS</i>
6 July	Ministers, special advisers and officials	Email	24-hour pre-release access to the <i>FRS</i>

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. [...]

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 July 2022 *Fiscal risks and sustainability* on 4 July:

Ministers

Chancellor of the Exchequer
Chief Secretary of the Treasury
Exchequer Secretary

Special Advisers’ Office

Head of Special Advisers' Office
Deputy Head of Special Advisers' Office
Nerissa Chesterfield
Douglas McNeill
Rupert Yorke
Liam Booth Smith

James Price

Tom Kennedy

Treasury Officials

Permanent Secretary - Tom Scholar

Second Permanent Secretary - Charles Roxburgh

Chief Economic Advisor - Clare Lombardelli

Director General, Tax and Welfare - Beth Russell

Director, Fiscal - Tom Josephs

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

Director, Economics - James Benford

Director, EGU - Steve Field

Co-Director, Personal Tax, Welfare and Pensions - Suzy Kantor

Director, Public Spending - Conrad Smewing

Director, Business and International Tax - Mike Williams

Director, Public Services - Philippa Davies

Director, International - Robert Woods

Deputy Director, General Expenditure Policy - Johanna Harston

Deputy Director, Fiscal Statistics and Policy - Ruth Curtice

Deputy Director, Budget and Finance Bill - Sean Jones

Deputy Director, Economic Assessment - Aishani Roy

Deputy Director, Labour Markets, Human Capital, Supply and Regions - Tom Pybus

Deputy Director, Macroeconomic Coordination and Strategy - Daniel Gallagher

Deputy Director, Macroeconomic Policy - Neil McMurdo

Deputy Director, Debt & Reserves Management - Bruno Williams

Deputy Director, Balance Sheet Analysis - Sue Connaughton

Deputy Director, Economic Risks - Nick Broadway

Deputy Director, Economic Risks - Louise Tinsley

Deputy Director, Government Risk Profession - Clive Martin

Deputy Director, Climate Policy - Joe Taylor

Deputy Director, ETT - Jonny Halls

Deputy Director, Energy Response Team - Jonathan Edwards

Deputy Director, Defence Spending - Emily Curtis

Deputy Director, Energy, Environment and Agriculture - Jon Fuller

Official preparing briefing (Fiscal) x8

Official preparing briefing (Spending Analysis)

Official preparing briefing (State pensions) x4

Official preparing briefing (Tax strategy)

Official preparing briefing (Debt interest)

Official preparing briefing (Migration) x2

Official preparing briefing (Economic Risks)

Official preparing briefing (GDP and Inflation)

Official preparing briefing (Economic Risks)

Official preparing briefing (Balance Sheet)

Official preparing briefing (Macroeconomic Policy)

Official preparing briefing (Defence Spending) x4
Official preparing briefing (Cyber Spending)
Official preparing briefing (Trade analysis)
Official preparing briefing (Global Economics) x2
Official preparing briefing (Financial Stability)
Official preparing briefing (Climate and Net Zero) x2
Official preparing briefing (Carbon and Energy tax) x2
Official preparing briefing (Energy modelling)
Official preparing briefing (Household Living Standards)
Official preparing briefing (Energy Policy) x4
Official preparing briefing (Energy and Transport taxes) x2
Official preparing briefing (Scorecard, Planning and Budget)

Head of Press Office - Tom Lawrence
Deputy Director, Press Office - Dave Pares
Press Officer
Economy & Public Spending Communications
Economy & Strategic Communication