Log of substantive contact between the Office for Budget Responsibility and Treasury Ministers and their Special Advisers and private office staff, between 3 March 2021 and 26 October 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>25 June</td>
<td>Chancellor, Chancellor’s and XST’s office officials, other Treasury officials.</td>
<td>Email</td>
<td>Sharing draft conclusions of the Fiscal risks report.</td>
</tr>
<tr>
<td>29 July</td>
<td>Chancellor’s office.</td>
<td>Email</td>
<td>Official request to begin the forecast process.</td>
</tr>
<tr>
<td>1 September</td>
<td>Chancellor’s office and other Treasury officials.</td>
<td>Email</td>
<td>Note on the Round 1 economy and fiscal forecast.</td>
</tr>
<tr>
<td>20 September</td>
<td>Chancellor’s office and other Treasury officials.</td>
<td>Email</td>
<td>Note on the Round 2 economy and fiscal forecast.</td>
</tr>
<tr>
<td>21 September</td>
<td>Chancellor, Chancellor’s office and other Treasury officials.</td>
<td>Virtual meeting</td>
<td>To discuss the emerging forecast.</td>
</tr>
<tr>
<td>1 October</td>
<td>Chancellor’s office and other Treasury officials.</td>
<td>Email</td>
<td>Note on the Round 3 economy and fiscal forecast.</td>
</tr>
<tr>
<td>22-24 October</td>
<td>Ministers, special advisers and officials (named below)</td>
<td>Email</td>
<td>Advance pre-release draft EFO chapters</td>
</tr>
</tbody>
</table>
Meetings with members of Her Majesty’s Opposition

<table>
<thead>
<tr>
<th>Date</th>
<th>Shadow Chancellor of the Exchequer</th>
<th>Meeting/Phone call</th>
<th>Discussion</th>
</tr>
</thead>
<tbody>
<tr>
<td>21 July</td>
<td></td>
<td>Meeting</td>
<td>To discuss fiscal issues.</td>
</tr>
<tr>
<td>24 September</td>
<td></td>
<td>Phone call</td>
<td>To discuss fiscal issues.</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 22 October:

**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/Daniel Gallagher
- Director, Personal Tax, Welfare and Pensions – Lindsey Whyte/Suzy Kantor
- Director, Public Spending – Conrad Smewing
- Director, Climate, Environment and Energy – Steve Field
- Director, COVID Response – Kate Joseph
- Director, Business and International tax – Mike Williams
- Deputy Director, General Expenditure Policy – Johanna Harston/Marcus Mason
- Deputy Director, Fiscal Statistics and Policy – Ruth Curtice
- Deputy Director, Strategy, Planning and Budget – Sean Jones
- Deputy Director, Economic Assessment – Maeve Conolly
- Deputy Director, Welfare Spending and Reform – Chris Drane
- Deputy Director, Macroeconomic Coordination and Strategy – Thomas Yeomans
- Deputy Director, Debt and Reserves Management – Mario Pisani/Azin Roussos
- Deputy Director, Macroeconomic Policy – Neil McMurdo
- Deputy Director, Resilience and Resolution – Joe Taylor
- Deputy Director, Balance Sheet Analysis – Sue Connaughton
- Deputy Director, Enterprise and Property Tax - Matthew Henty
- Deputy Director, VAT and Excise – Mike Cunningham

Official preparing briefing (economy) x3
Official preparing briefing (economy forecast) x3
Official preparing briefing (fiscal forecast) x5
Official preparing briefing (fiscal policy) x4
Official preparing briefing (fiscal briefing) x2
Official preparing briefing (Fiscal Balance Sheet) x2
Official preparing briefing (macroeconomic policy)
Official preparing briefing (spending) x2
Official preparing briefing (welfare) x3
Official preparing briefing (policy costings) x3
Official preparing briefing (presentational) x2
Official preparing briefing (tax strategy)
Official preparing briefing (NICs)
Official preparing briefing (ODA)

Head of Communications – David Pares
Head of Special Advisors Office
Press officer x3