

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

Date	Which Ministers, Offices or Special Advisers?	Type of contact	Brief summary of discussion/purpose
25 June	Chancellor, Chancellor's and XST's office officials, other Treasury officials.	Email	Sharing draft conclusions of the <i>Fiscal risks report</i> .
29 July	Chancellor's office.	Email	Official request to begin the forecast process.
1 September	Chancellor's office and other Treasury officials.	Email	Note on the Round 1 economy and fiscal forecast.
20 September	Chancellor's office and other Treasury officials.	Email	Note on the Round 2 economy and fiscal forecast.
21 September	Chancellor, Chancellor's office and other Treasury officials.	Virtual meeting	To discuss the emerging forecast.
1 October	Chancellor's office and other Treasury officials.	Email	Note on the Round 3 economy and fiscal forecast.
22-24 October	Ministers, special advisers and officials (named below)	Email	Advance pre-release draft <i>EFO</i> chapters

Meetings with members of Her Majesty's Opposition

21 July	Shadow Chancellor of the Exchequer	Meeting	To discuss fiscal issues.
24 September	Shadow Chancellor of the Exchequer	Phone call	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 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