

SCHEDULE 1

Article 2(1)

Amendments of the Pension Schemes Act relating to contracted-out occupational and appropriate personal pension schemes, extending those provisions to surviving civil partners

1. The Pension Schemes Act is amended in accordance with paragraphs 2 to 24.

Commencement Information

I1 Sch. 1 para. 1 in operation at 5.12.2005, see [art. 1\(3\)](#)

2. In section 4(2) (meaning of “contracted-out employment”, “guaranteed minimum pension” and “minimum payment”), in the definition of “guaranteed minimum pension”, for “widow’s or widower’s” there shall be substituted “widow’s, widower’s or surviving civil partner’s”.

Commencement Information

I2 Sch. 1 para. 2 in operation at 5.12.2005, see [art. 1\(3\)](#)

3. In section 8A(1) and (2)(b)(1) (the statutory standard) for “widows or widowers” there shall be substituted “widows, widowers or surviving civil partners”.

Commencement Information

I3 Sch. 1 para. 3 in operation at 5.12.2005, see [art. 1\(3\)](#)

4. In section 8B(4)(2) (reference scheme) for “widows or widowers”, in each place where it occurs, there shall be substituted “widows, widowers or surviving civil partners”.

Commencement Information

I4 Sch. 1 para. 4 in operation at 5.12.2005, see [art. 1\(3\)](#)

5. In section 13 (minimum pensions for widows and widowers)—
- (a) in subsection (1) for “widow or widower”, in each place where it occurs, there shall be substituted “widow, widower or surviving civil partner”;
 - (b) in subsection (2), after paragraph (b) there shall be added the following paragraph—
 - “(c) if the earner is a person who has a guaranteed minimum under that section, the weekly rate of the surviving civil partner’s pension will not be less than the surviving civil partner’s guaranteed minimum.”;
 - (c) in subsection (4) after “widower’s” there shall be inserted “or surviving civil partner’s”;
 - (d) in subsection (4A)(3)—
 - (i) at the beginning there shall be inserted “Subject to subsection (4B)”;
 - (ii) for “widow or widower’s” there shall be substituted “widow’s, widower’s or surviving civil partner’s”;

(1) Section 8A was inserted by Article 133(5) of the Pensions (Northern Ireland) Order 1995

(2) Section 8B was inserted by Article 133(5) of the Pensions (Northern Ireland) Order 1995 and amended by regulation 2 of S.R. 1997 No. 162

(3) Subsection (4A) was inserted by paragraph 1 of Schedule 5 to the Child Support, Pensions and Social Security Act (Northern Ireland) 2000

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

- (iii) for “widow or widower”, in each place where it occurs (other than paragraph (c)(i) and (ii)), there shall be substituted “widow, widower or surviving civil partner”;
- (iv) for paragraph (c)(i) and (ii) there shall be substituted the following sub-paragraphs—
 - “(i) comprises a period during which the widow, widower or surviving civil partner and—
 - (a) a person of the opposite sex are living together as husband and wife, or
 - (b) a person of the same sex are living together as if they were civil partners, nor
 - (ii) falls after the time of any—
 - (a) marriage, or
 - (b) formation of a civil partnership,by the widow or widower or surviving civil partner which takes place after the earner’s death.”;
- (e) after subsection (4A), there shall be inserted the following subsection—
 - “(4B) Sub-paragraphs (i)(b) and (ii)(b) of subsection (4A)(c) do not apply where the earner dies before 5th December 2005.”;
- (f) in subsection (6)(4) for “widower’s pension to be payable to him” there shall be substituted “widower’s or surviving civil partner’s pension to be payable”;
- (g) in subsection (7)(5) for “widowers or widows” there shall be substituted “widows, widowers or surviving civil partners”, and
- (h) after subsection (8)(6) there shall be added the following subsection—
 - “(9) For the purposes of subsection (4A), two people of the same sex are to be regarded as living together as if they were civil partners if, but only if, they would be regarded as living together as husband and wife were they instead two people of the opposite sex.”.

Commencement Information

- I5** Sch. 1 para. 5 in operation at 10.11.2005 for specified purposes, see [art. 1\(2\)\(a\)](#)
- I6** Sch. 1 para. 5 in operation in so far as not already in operation at 5.12.2005, see [art. 1\(3\)](#)

6. In section 15(5)(a)(i) and (ii) (discharge of liability where guaranteed minimum pensions secured by insurance policies or annuity contracts) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

- I7** Sch. 1 para. 6 in operation at 5.12.2005, see [art. 1\(3\)](#)

7. In section 16(6) (transfer of accrued rights) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

(4) Subsection (6) was amended by paragraph 1(3) of Schedule 5 to the Child Support, Pensions and Social Security Act (Northern Ireland) 2000

(5) Subsection (7) was amended by paragraph 22 of Schedule 3 to the Pensions (Northern Ireland) Order 1995 and by paragraph 42 of Schedule 1 to the Social Security Contributions (Transfer of Functions, etc.) (Northern Ireland) Order 1999 ([S.I. 1999/671](#))

(6) Subsection (8) is added by Article 261(2) of the Pensions (Northern Ireland) Order 2005

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

Commencement Information

I8 Sch. 1 para. 7 in operation at 5.12.2005, see [art. 1\(3\)](#)

8. In section 17(2) (commutation, surrender and forfeiture) for “widow’s or widower’s” there shall be substituted “widow’s, widower’s or surviving civil partner’s”.

Commencement Information

I9 Sch. 1 para. 8 in operation at 10.11.2005 for specified purposes, see [art. 1\(2\)\(a\)](#)

I10 Sch. 1 para. 8 in operation in so far as not already in operation at 5.12.2005, see [art. 1\(3\)](#)

9. In section 19(3)(b) (securing of benefits)(7) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I11 Sch. 1 para. 9 in operation at 5.12.2005, see [art. 1\(3\)](#)

^{F1}10.

F1 Sch. 1 paras. 10-12 revoked (with effect in accordance with s. 19(5) of the amending Act) by [Pensions Act \(Northern Ireland\) 2008 \(c. 1\)](#), [Sch. 6 Pt. 6](#) (as amended by [2015 c. 5 \(N.I.\)](#), [Sch. 13 para. 77](#))

^{F1}11.

F1 Sch. 1 paras. 10-12 revoked (with effect in accordance with s. 19(5) of the amending Act) by [Pensions Act \(Northern Ireland\) 2008 \(c. 1\)](#), [Sch. 6 Pt. 6](#) (as amended by [2015 c. 5 \(N.I.\)](#), [Sch. 13 para. 77](#))

^{F1}12.

F1 Sch. 1 paras. 10-12 revoked (with effect in accordance with s. 19(5) of the amending Act) by [Pensions Act \(Northern Ireland\) 2008 \(c. 1\)](#), [Sch. 6 Pt. 6](#) (as amended by [2015 c. 5 \(N.I.\)](#), [Sch. 13 para. 77](#))

13. In section 33(4)(8) (alteration of rules of contracted-out schemes) after “widower” there shall be inserted “or surviving civil partner”.

Commencement Information

I12 Sch. 1 para. 13 in operation at 5.12.2005, see [art. 1\(3\)](#)

14. In section 34(2) (alteration of rules of appropriate schemes)—
(a) after “apply” there shall be inserted “(a)”, and
(b) after “prescribed description” there shall be inserted—
“; or

(7) See paragraph 24 of Schedule 3 to the Pensions (Northern Ireland) Order 1995
(8) Section 33 was substituted by paragraph 32 of Schedule 3 to the Pensions (Northern Ireland) Order 1995

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

- (b) where the rules of the relevant scheme are altered to make provision for pensions for surviving civil partners”.

Commencement Information

I13 Sch. 1 para. 14 in operation at 5.12.2005, see art. 1(3)

15. In section 43(9) (further provisions concerning entitlement to guaranteed minimum pensions for the purposes of section 42)—

- (a) in subsection (1) after “widower” there shall be inserted “or surviving civil partner”;
- (b) in subsection (3)—
 - (i) for “widow or widower”, in each place where it occurs, there shall be substituted “widow, widower or surviving civil partner”, and
 - (ii) for “widow’s or widower’s” there shall be substituted “widow’s, widower’s or surviving civil partner’s”.

Commencement Information

I14 Sch. 1 para. 15 in operation at 5.12.2005, see art. 1(3)

16. In section 44(2)(c)(10) (reduced benefits where minimum payments or minimum contributions paid) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I15 Sch. 1 para. 16 in operation at 5.12.2005, see art. 1(3)

17. In section 56(5)(11) (effect of payment of premium on rights) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I16 Sch. 1 para. 17 in operation at 5.12.2005, see art. 1(3)

18. In section 83 (general protection principle)—
- (a) in subsection (2)(c) for “widow or widower, the widow’s or, as the case may be, the widower’s” there shall be substituted “widow, widower or surviving civil partner, the widow’s, widower’s or surviving civil partner’s (as the case may be)”;
 - (b) in subsection (3) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”;

(9) Subsection (1) was amended by section 18 of the State Pension Credit Act (Northern Ireland) 2002 (c. 14 (N.I.)) and by paragraph 55 of Schedule 1 to the Social Security (Incapacity for Work) (Northern Ireland) Order 1994 (S.I. 1994/1898 (N.I. 12)); subsection (3) was amended by article 20 of the Financial Services and Markets Act 2000 (Consequential Amendments) Order 2002 (S.I. 2002/1555)

(10) Section 44 ceased to have effect for minimum payments or minimum contributions paid from 6th April 1997 in consequence of Article 137(3) of the Pensions (Northern Ireland) Order 1995; subsection (2)(c) was amended by Article 137(2) of the Pensions (Northern Ireland) Order 1995

(11) Subsection (5) was amended by paragraph 46(c) of Schedule 3 to the Pensions (Northern Ireland) Order 1995

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

(c) in subsections (3)(a) and (4)(d) for “widow’s or widower's” there shall be substituted “widow's, widower’s or surviving civil partner's”.

Commencement Information

I17 Sch. 1 para. 18 in operation at 5.12.2005, see **art. 1(3)**

19. In section 84(1)(b) (the relevant sum) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I18 Sch. 1 para. 19 in operation at 5.12.2005, see **art. 1(3)**

20. In section 85(1)(a) and (b) and (2)(b) (the appropriate addition) for “widow’s or widower's” there shall be substituted “widow's, widower’s or surviving civil partner's”.

Commencement Information

I19 Sch. 1 para. 20 in operation at 5.12.2005, see **art. 1(3)**

21. In section 86(2)(a) and (b) (the later earnings addition) for “widow’s or widower's” there shall be substituted “widow's, widower’s or surviving civil partner's”.

Commencement Information

I20 Sch. 1 para. 21 in operation at 5.12.2005, see **art. 1(3)**

22. In section 105(1)(b) (annual increase of guaranteed minimum pensions) for “widows and widowers” there shall be substituted “widows, widowers and surviving civil partners”.

Commencement Information

I21 Sch. 1 para. 22 in operation at 5.12.2005, see **art. 1(3)**

23. In section 106(1)(b)(12) (requirement as to resources for annual increase of guaranteed minimum pensions) for “widow or widower”, in each place where it occurs, there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I22 Sch. 1 para. 23 in operation at 5.12.2005, see **art. 1(3)**

24.—(1) In section 165(1)(c)(13) (determination of questions by Department) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

(12) Subsection (1) was amended by Article 53(4) of the Pensions (Northern Ireland) Order 1995

(13) Subsection (1)(c) was amended by article 21 of the Financial Services and Markets Act 2000 (Consequential Amendments) Order 2002. See Article 15(1) of the Social Security Contributions (Transfer of Functions, etc.) (Northern Ireland) Order 1999

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

(2) The reference in sub-paragraph (1) to section 165 is a reference to that section as it has effect without the substitution made by paragraph 99 of Schedule 6 to the Social Security (Northern Ireland) Order 1998(14).

Commencement Information

I23 Sch. 1 para. 24 in operation at 5.12.2005, see art. 1(3)

SCHEDULE 2

Article 2(2)

Amendments of provisions of Regulations relating to contracted-out occupational and appropriate personal pension schemes, extending those provisions to surviving civil partners

PART 1

Amendment of the Personal and Occupational Pension Schemes (Abatement of Benefit) Regulations

1. The Personal and Occupational Pension Schemes (Abatement of Benefit) Regulations (Northern Ireland) 1987(15) are amended in accordance with paragraphs 2 and 3.

Commencement Information

I24 Sch. 2 para. 1 in operation at 5.12.2005, see art. 1(3)

2. In regulation 3(16) (guaranteed minimum pension to which earner’s widow or widower is treated as entitled after minimum contributions have been paid)—

- (a) in the heading for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”;
- (b) for “widow or widower”, in each place where it occurs, there shall be substituted “widow, widower or surviving civil partner”, and
- (c) in paragraph (2) after “widower” there shall be inserted “or surviving civil partner”.

Commencement Information

I25 Sch. 2 para. 2 in operation at 5.12.2005, see art. 1(3)

3. In regulation 5(17) (guaranteed minimum pension to which earner’s widow or widower is treated as entitled after minimum payments have been made)—

(14) S.I. 1998/1506 (N.I. 10)

(15) S.R. 1987 No. 291, amended by S.R. 1994 No. 300 and S.R. 1996 No. 95

(16) Regulation 3 was amended by paragraph 16 of Schedule 2 to S.R. 1994 No. 300 and regulation 4(2) of S.R. 1996 No. 95

(17) Regulation 5 was amended by paragraph 16 of Schedule 2 to S.R. 1994 No. 300 and regulation 4(3) of S.R. 1996 No. 95

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

- (a) in the heading for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”;
- (b) for “widow or widower”, in each place where it occurs, there shall be substituted “widow, widower or surviving civil partner”, and
- (c) in paragraph (2) after “widower” there shall be inserted “or surviving civil partner”.

Commencement Information

I26 Sch. 2 para. 3 in operation at 5.12.2005, see [art. 1\(3\)](#)

PART 2

Amendment of the Contracting-out (Protection of Pensions) Regulations

4. The Contracting-out (Protection of Pensions) Regulations (Northern Ireland) 1991(18) are amended in accordance with paragraphs 5 to 8.

Commencement Information

I27 Sch. 2 para. 4 in operation at 5.12.2005, see [art. 1\(3\)](#)

5. In regulation 2(1) (hybrid benefits) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I28 Sch. 2 para. 5 in operation at 5.12.2005, see [art. 1\(3\)](#)

6. In regulation 4(19) (pensions for widows and widowers varied after commencement)—
- (a) in the heading for “widows and widowers” there shall be substituted “widows, widowers and surviving civil partners”, and
 - (b) for “widow or widower”, in each place where it occurs, there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I29 Sch. 2 para. 6 in operation at 5.12.2005, see [art. 1\(3\)](#)

7. In regulation 5(20) (the relevant sum for widows and widowers)—
- (a) in the heading for “widows and widowers” there shall be substituted “widows, widowers and surviving civil partners”, and

(18) S.R. 1991 No. 39, amended by S.R. 1994 No. 300

(19) Regulation 4(2) was amended by paragraph 28(5) of Schedule 2 to S.R. 1994 No. 300

(20) Regulation 5(2) was amended by paragraph 28(6) of Schedule 2 to S.R. 1994 No. 300

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

- (b) in paragraph (2)—
- (i) for “widow or widower” (in the first place where it occurs) there shall be substituted “widow, widower or surviving civil partner”, and
 - (ii) in sub-paragraph (a) after “widow or widower” there shall be inserted “or being then a civil partner of the surviving civil partner”.

Commencement Information

I30 Sch. 2 para. 7 in operation at 5.12.2005, see [art. 1\(3\)](#)

8. In regulation 8(1) (the later earnings addition) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I31 Sch. 2 para. 8 in operation at 5.12.2005, see [art. 1\(3\)](#)

PART 3

Amendment of the Occupational Pension Schemes (Discharge of Protected Rights on Winding Up) Regulations

9. In regulation 5(a) of the Occupational Pension Schemes (Discharge of Protected Rights on Winding Up) Regulations (Northern Ireland) 1996⁽²¹⁾ (conditions on which appropriate policies of insurance may be commuted) for “his widow or her widower” there shall be substituted “the beneficiary’s widow, widower or surviving civil partner”.

Commencement Information

I32 Sch. 2 para. 9 in operation at 5.12.2005, see [art. 1\(3\)](#)

PART 4

Amendment of the Occupational Pension Schemes (Contracting-out) Regulations

10. The Occupational Pension Schemes (Contracting-out) Regulations (Northern Ireland) 1996⁽²²⁾ are amended in accordance with paragraphs 11 to 23.

Commencement Information

I33 Sch. 2 para. 10 in operation at 5.12.2005, see [art. 1\(3\)](#)

⁽²¹⁾ S.R. 1996 No. 94, to which there are amendments not relevant to these Regulations

⁽²²⁾ S.R. 1996 No. 493; relevant amending regulations are S.R. 1997 No. 160, S.R. 1997 No. 162, S.R. 1998 No. 208, S.R. 2000 No. 336, S.R. 2002 No. 109 and S.I. 2002/681. See also Schedule 2 to the Social Security Contributions (Transfer of Functions, etc.) (Northern Ireland) Order 1999

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

11. In regulation 1 (citation, commencement and interpretation) after paragraph (1) there shall be inserted the following paragraph—

“(1A) For the purposes of these Regulations, two people of the same sex are to be regarded as living together as if they were civil partners if, but only if, they would be regarded as living together as husband and wife were they instead two people of the opposite sex.”.

Commencement Information

I34 Sch. 2 para. 11 in operation at 5.12.2005, see **art. 1(3)**

^{F2}12.

F2 Sch. 2 para. 12 revoked (6.4.2016) by The Occupational Pension Schemes (Schemes that were Contracted-out) Regulations (Northern Ireland) 2016 (S.R. 2016/107), reg. 1(a), **Sch. 2**

13. In regulation 23(b) (requirements for meeting the statutory standard) for “widows or widowers”, in each place where it occurs, there shall be substituted “widows, widowers or surviving civil partners”.

Commencement Information

I35 Sch. 2 para. 13 in operation at 5.12.2005, see **art. 1(3)**

14. For regulation 26 (reference scheme: circumstances in which widows' or widowers' pensions need not be payable) there shall be substituted the following regulation—

“Reference scheme: circumstances in which widows', widowers' or surviving civil partners' pensions need not be payable

26.—(1) For the purposes of section 8B(4)(a)(**23**) of the Act (reference scheme to provide widows', widowers' and surviving civil partners' pensions except in prescribed circumstances), and subject to paragraph (2), the prescribed circumstances are where—

- (a) the scheme member marries or forms a civil partnership after having received benefits under the scheme;
- (b) the widow, widower or surviving civil partner of the scheme member—
 - (i) remarries or, as the case may be, marries;
 - (ii) forms a civil partnership or, as the case may be, forms a subsequent civil partnership;
 - (iii) lives together as husband and wife with another person to whom he or she is not married, or

(23) Section 8B was inserted by Article 133(5) of the Pensions (Northern Ireland) Order 1995 and amended by regulation 2 of S.R. 1997 No. 162

Changes to legislation: There are currently no known outstanding effects for the *The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005*. (See end of Document for details)

- (iv) lives together with a person of the same sex as if they were civil partners, after having received benefits under the scheme;
 - (c) the widow, widower or surviving civil partner of the scheme member is at the time of the member’s death—
 - (i) living together as husband and wife with another person to whom he or she is not married, or
 - (ii) living together with a person of the same sex as if they were civil partners.
- (2) Paragraph (1)(b)(ii) and (iv) and (c)(ii) does not apply where the scheme member dies before 5th December 2005.”.

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Commencement Information

I36 Sch. 2 para. 14 in operation at 5.12.2005, see [art. 1\(3\)](#)

15. In regulation 45(3A)(24) (approval of arrangements for schemes ceasing to be contracted-out) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

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Commencement Information

I37 Sch. 2 para. 15 in operation at 5.12.2005, see [art. 1\(3\)](#)

16. In regulation 50A(25) (persons to be regarded as members) for “widow’s or widower's” there shall be substituted “widow's, widower’s or surviving civil partner's”.

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Commencement Information

I38 Sch. 2 para. 16 in operation at 5.12.2005, see [art. 1\(3\)](#)

^{F3}17.

F3 Sch. 2 paras. 17-23 revoked (6.4.2016) by [The Occupational Pension Schemes \(Schemes that were Contracted-out\) Regulations \(Northern Ireland\) 2016 \(S.R. 2016/107\)](#), reg. 1(a), [Sch. 2](#)

^{F3}18.

F3 Sch. 2 paras. 17-23 revoked (6.4.2016) by [The Occupational Pension Schemes \(Schemes that were Contracted-out\) Regulations \(Northern Ireland\) 2016 \(S.R. 2016/107\)](#), reg. 1(a), [Sch. 2](#)

(24) Paragraph (3A) was inserted by regulation 3(3) of [S.R. 1997 No. 162](#)
 (25) Regulation 50A was inserted by regulation 5 of [S.R. 1998 No. 208](#)

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

F319.

F3 Sch. 2 paras. 17-23 revoked (6.4.2016) by The Occupational Pension Schemes (Schemes that were Contracted-out) Regulations (Northern Ireland) 2016 (S.R. 2016/107), reg. 1(a), **Sch. 2**

F320.

F3 Sch. 2 paras. 17-23 revoked (6.4.2016) by The Occupational Pension Schemes (Schemes that were Contracted-out) Regulations (Northern Ireland) 2016 (S.R. 2016/107), reg. 1(a), **Sch. 2**

F321.

F3 Sch. 2 paras. 17-23 revoked (6.4.2016) by The Occupational Pension Schemes (Schemes that were Contracted-out) Regulations (Northern Ireland) 2016 (S.R. 2016/107), reg. 1(a), **Sch. 2**

F322.

F3 Sch. 2 paras. 17-23 revoked (6.4.2016) by The Occupational Pension Schemes (Schemes that were Contracted-out) Regulations (Northern Ireland) 2016 (S.R. 2016/107), reg. 1(a), **Sch. 2**

F323.

F3 Sch. 2 paras. 17-23 revoked (6.4.2016) by The Occupational Pension Schemes (Schemes that were Contracted-out) Regulations (Northern Ireland) 2016 (S.R. 2016/107), reg. 1(a), **Sch. 2**

PART 5

Amendment of the Protected Rights (Transfer Payment) Regulations

24. In regulation 4(d) of the Protected Rights (Transfer Payment) Regulations (Northern Ireland) 1996⁽²⁶⁾ (transfer payments to salary related contracted-out schemes) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

⁽²⁶⁾ S.R. 1996 No. 509, to which there are amendments not relevant to these Regulations

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

Commencement Information

I39 Sch. 2 para. 24 in operation at 5.12.2005, see [art. 1\(3\)](#)

PART 6

Amendment of the Contracting-out (Transfer and Transfer Payment) Regulations

25. In paragraph 6(b) of Part III of Schedule 1 to the Contracting-out (Transfer and Transfer Payment) Regulations (Northern Ireland) 1996⁽²⁷⁾ (further conditions for transfer of liability for the payment of a guaranteed minimum pension to, or in respect of, a person who has become entitled to it) for “his widow or her widower” there shall be substituted “the widow, widower or surviving civil partner of that person”.

Commencement Information

I40 Sch. 2 para. 25 in operation at 5.12.2005, see [art. 1\(3\)](#)

PART 7

Amendment of the Personal and Occupational Pension Schemes (Protected Rights) Regulations

26. The Personal and Occupational Pension Schemes (Protected Rights) Regulations (Northern Ireland) 1997⁽²⁸⁾ are amended in accordance with paragraphs 27 to 35.

Commencement Information

I41 Sch. 2 para. 26 in operation at 5.12.2005, see [art. 1\(3\)](#)

27. In regulation 1(2) (citation, commencement and interpretation) after the definition of “child benefit” there shall be inserted the following definition—

““marital or civil partnership status”, in relation to a person, means whether that person has previously formed a marriage or a civil partnership and, if so, whether that marriage or civil partnership has ended;”.

Commencement Information

I42 Sch. 2 para. 27 in operation at 5.12.2005, see [art. 1\(3\)](#)

28. In regulation 4 (conditions applying to pensions and annuities which give effect to protected rights)—

⁽²⁷⁾ S.R. 1996 No. 618, to which there are amendments not relevant to these Regulations

⁽²⁸⁾ S.R. 1997 No. 56; relevant amending regulations are S.R. 2002 No. 109, S.R. 2003 No. 256 and S.R. 2005 No. 170

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

- (a) in paragraph (2)(b)(**29**)—
 - (i) for “an unmarried member” there shall be substituted “a member who is neither married nor a civil partner”, and
 - (ii) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”, and
- (b) in paragraph (9)(a) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I43 Sch. 2 para. 28 in operation at 5.12.2005, see **art. 1(3)**

29. In regulation 5(**30**) (circumstances in which and periods for which pension or annuity is to be paid to widow or widower after being paid to member)—

- (a) in the heading for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”;
- (b) in paragraph (1)(b) for “widow’s or widower’s” there shall be substituted “widow’s, widower’s or surviving civil partner’s”, and
- (c) for paragraph (2) there shall be substituted the following paragraphs—
 - “(2) There is excluded from the period prescribed in paragraph (1)(b) any period after—
 - (a) the widow’s or widower’s remarriage or the surviving civil partner’s marriage under pensionable age, or
 - (b) subject to paragraph (3), the widow’s or widower’s formation of a civil partnership, or the surviving civil partner’s formation of a subsequent civil partnership under pensionable age.
 - (3) Paragraph (2)(b) does not apply where the member dies before 5th December 2005.”.

Commencement Information

I44 Sch. 2 para. 29 in operation at 5.12.2005, see **art. 1(3)**

30. In regulation 6(c) (interim arrangements)—

- (a) for “an unmarried member” there shall be substituted “a member who is neither married nor a civil partner”, and
- (b) for “widow or widower”, in each place where it occurs, there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I45 Sch. 2 para. 30 in operation at 5.12.2005, see **art. 1(3)**

(29) Paragraph (2)(b) was substituted by regulation 5(2) of S.R. 2002 No. 109

(30) Regulation 5 was substituted by regulation 5(3) of S.R. 2002 No. 109

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

31. In regulation 11(1)(b)(31) (insurers that may provide protected rights by way of annuities) after “marital” there shall be inserted “or civil partnership”.

Commencement Information

I46 Sch. 2 para. 31 in operation at 5.12.2005, see **art. 1(3)**

32. In regulation 12(32) (death of member before effect given to his protected rights)—
- (a) in paragraph (2), in each place where it occurs, and paragraphs (3), (5), (9), (11)(a), (12), (13) and (14), for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”;
 - (b) in paragraph (5) for sub-paragraph (b) there shall be substituted the following sub-paragraphs—
 - “(b) in the case of a widow or widower, remarries or, in the case of a surviving civil partner, marries while under pensionable age, or
 - (c) subject to paragraph (15), in the case of a widow or widower, forms a civil partnership or, in the case of a surviving civil partner, forms a subsequent civil partnership while under pensionable age.”;
 - (c) in paragraph (9) for sub-paragraph (b) there shall be substituted the following sub-paragraphs—
 - “(b) in the case of a widow or widower, remarried or, in the case of a surviving civil partner, married while under pensionable age, or
 - (c) subject to paragraph (15), in the case of a widow or widower, formed a civil partnership or, in the case of a surviving civil partner, formed a subsequent civil partnership while under pensionable age.”; and
 - (d) after paragraph (14) there shall be added the following paragraph—

“(15) Paragraphs (5)(c) and (9)(c) do not apply where the member dies before 5th December 2005.”.

Commencement Information

I47 Sch. 2 para. 32 in operation at 5.12.2005, see **art. 1(3)**

33. In regulation 13(33) (death before effect given to protected rights: interim arrangements for widow or widower)—
- (a) in the heading for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”;
 - (b) in paragraph (1) for “widow or widower”, in each place where it occurs, there shall be substituted “widow, widower or surviving civil partner”, and
 - (c) in paragraph (2)(a)(ii) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

(31) The heading to regulation 11 was amended and paragraph (1) numbered as such and amended by regulation 10 of S.R. 2003 No. 256

(32) Regulation 12 was amended by regulation 5(6) of S.R. 2002 No. 109 and regulation 11 of S.R. 2005 No. 170

(33) Regulation 13 was amended by regulation 5(7) of S.R. 2002 No. 109

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

Commencement Information

I48 Sch. 2 para. 33 in operation at 5.12.2005, see **art. 1(3)**

34. In regulation 14 (enforceable entitlement after death of member) after “widower” there shall be inserted “, surviving civil partner”.

Commencement Information

I49 Sch. 2 para. 34 in operation at 5.12.2005, see **art. 1(3)**

35. In regulation 15 (further requirements in respect of giving effect to protected rights) after “marital” there shall be inserted “or civil partnership”.

Commencement Information

I50 Sch. 2 para. 35 in operation at 5.12.2005, see **art. 1(3)**

PART 8

Amendment of the Occupational Pension Schemes (Modification of Schemes) Regulations

^{F4}36.

F4 Sch. 2 para. 36 revoked (6.4.2006) by The Occupational Pension Schemes (Modification of Schemes) Regulations (Northern Ireland) 2006 (S.R. 2006/149), reg. 1(1), **Sch.**

PART 9

Amendment of the Personal Pension Schemes (Appropriate Schemes) Regulations

37. In regulation 6A of the Personal Pension Schemes (Appropriate Schemes) Regulations (Northern Ireland) 1997(**34**) (provision of information for purposes of contracting-out) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I51 Sch. 2 para. 37 in operation at 5.12.2005, see **art. 1(3)**

(34) S.R. 1997 No. 139; regulation 6A was inserted by regulation 7 of S.R. 2002 No. 109

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

PART 10

Amendment of the Occupational Pension Schemes (Discharge of Liability) Regulations

38. The Occupational Pension Schemes (Discharge of Liability) Regulations (Northern Ireland) 1997⁽³⁵⁾ are amended in accordance with paragraphs 39 to 45.

Commencement Information

I52 Sch. 2 para. 38 in operation at 5.12.2005, see [art. 1\(3\)](#)

39. In regulation 1 (citation, commencement and interpretation), after paragraph (1) there shall be inserted the following paragraph—

“(1A) For the purposes of these Regulations, two people of the same sex are to be regarded as living together as if they were civil partners if, but only if, they would be regarded as living together as husband and wife were they instead two people of the opposite sex.”.

Commencement Information

I53 Sch. 2 para. 39 in operation at 5.12.2005, see [art. 1\(3\)](#)

40. In regulation 3(a) (conditions on which policies of insurance and annuity contracts may be assigned or surrendered) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I54 Sch. 2 para. 40 in operation at 5.12.2005, see [art. 1\(3\)](#)

41. In regulation 4 (conditions on which policies of insurance and annuity contracts may be commuted)—

- (a) in paragraph (1)(a)(i) for “or widower” there shall be substituted “, widower or surviving civil partner”, and
- (b) in paragraph (2) for “widow’s or widower’s” there shall be substituted “widow’s, widower’s or surviving civil partner’s”.

Commencement Information

I55 Sch. 2 para. 41 in operation at 5.12.2005, see [art. 1\(3\)](#)

42. In regulation 6 (further conditions on which liability may be discharged)—

⁽³⁵⁾ S.R. 1997 No. 159; relevant amending regulations are S.R. 2005 No. 170

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

- (a) in paragraph (2)(a) for “or widower” there shall be substituted “, widower or surviving civil partner”, and
- (b) in paragraph (5) for “widow or widower”, in each place where it occurs, there shall be substituted “widow, widower or surviving civil partner”.

Commencement Information

I56 Sch. 2 para. 42 in operation at 5.12.2005, see **art. 1(3)**

43. In regulation 9(2) (circumstances in which liability to provide pensions under a relevant scheme may be discharged) for “widow or widower, or if there is no such widow or widower” there shall be substituted “widow, widower or surviving civil partner or, if there is no such person”.

Commencement Information

I57 Sch. 2 para. 43 in operation at 5.12.2005, see **art. 1(3)**

44. In regulation 11 (conditions on which liability to provide pensions under a relevant scheme may be discharged)—

- (a) in paragraph (3)(36)—
 - (i) in sub-paragraphs (a) and (b) for “widow or widower” there shall be substituted “widow, widower or surviving civil partner”;
 - (ii) in sub-paragraph (b) omit “and (c)”;
- (b) for paragraph (4) there shall be substituted the following paragraph—

“(4) Subject to paragraph (7), the circumstances referred to in paragraph (3) are—

 - (a) the beneficiary marries or forms a civil partnership after having received benefits under the policy or contract;
 - (b) the widow, widower or surviving civil partner of the beneficiary—
 - (i) remarries or, as the case may be, marries;
 - (ii) forms a civil partnership or, as the case may be, forms a subsequent civil partnership;
 - (iii) lives together as husband and wife with another person to whom he or she is not married;
 - (iv) lives together with a person of the same sex as if they were civil partners, or
 - (v) at the time of the beneficiary’s death—
 - (a) is living together as husband and wife with another person to whom he or she is not married, or
 - (b) is living together with a person of the same sex as if they were civil partners.”;
- (c) after paragraph (6), there shall be added the following paragraph—

“(7) Paragraph (4)(b)(ii), (iv) and (v)(b) does not apply where the beneficiary dies before 5th December 2005.”.

(36) Paragraph (3) was amended by regulation 13(a) of S.R. 2005 No. 170

Changes to legislation: There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005. (See end of Document for details)

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Commencement Information

I58 Sch. 2 para. 44 in operation at 5.12.2005, see **art. 1(3)**

45. In Schedule 1 (form of consent to arrangement for securing benefit) after “widower”, in each place where it occurs, there shall be inserted “/surviving civil partner”.

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Commencement Information

I59 Sch. 2 para. 45 in operation at 5.12.2005, see **art. 1(3)**

Changes to legislation:

There are currently no known outstanding effects for the The Civil Partnership (Contracted-out Occupational and Appropriate Personal Pension Schemes) (Surviving Civil Partners) Order (Northern Ireland) 2005.