

*Status: Point in time view as at 16/07/2015. This version of this schedule contains provisions that are not valid for this point in time.*

*Changes to legislation: Pensions Act (Northern Ireland) 2015, SCHEDULE 12 is up to date with all changes known to be in force on or before 06 April 2024. There are changes that may be brought into force at a future date. Changes that have been made appear in the content and are referenced with annotations. (See end of Document for details)*

## SCHEDULES

### SCHEDULE 12

Section 23.

#### STATE PENSION: AMENDMENTS

VALID FROM 14/09/2015

### PART 1

#### AMENDMENTS TO DO WITH NEW STATE PENSION SYSTEM

VALID FROM 06/04/2016

#### *The Forfeiture (Northern Ireland) Order 1982 (NI 14)*

**1** In Article 6 of the Forfeiture (Northern Ireland) Order 1982 (Commissioner to decide whether forfeiture rule applies to social security benefits), in the definition of “relevant enactment” in paragraph (5), after the entry relating to the Pension Schemes (Northern Ireland) Act 1993 insert— “Part 1 of the Pensions Act (Northern Ireland) 2015, ”.

#### **Commencement Information**

**11** [Sch. 12 para. 1](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

VALID FROM 25/02/2016

#### *The Social Security Contributions and Benefits (Northern Ireland) Act 1992 (c. 7)*

**2** The Contributions and Benefits Act is amended as follows.

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#### Commencement Information

- I2** [Sch. 12 para. 2](#) in operation at 25.2.2016 for specified purposes by [S.R. 2016/68](#), [art. 2\(e\)](#)

VALID FROM 06/04/2016

**3** In section 1 (outline of contributory system), in subsection (1)(a), after “this Act” insert “ or any other Act or Northern Ireland legislation ”.

#### Commencement Information

- I3** [Sch. 12 para. 3](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

VALID FROM 06/04/2016

**4** In section 13 (Class 3 contributions), in subsection (2), omit “contribution”.

#### Commencement Information

- I4** [Sch. 12 para. 4](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

VALID FROM 06/04/2016

**5** After section 19A insert—

#### “19B Extended meaning of benefit” etc. in Part 1

**19B** In this Part references to “benefit” or “contributory benefit” include benefit under Part 1 of the Pensions Act (Northern Ireland) 2015.”.

#### Commencement Information

- I5** [Sch. 12 para. 5](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

**6.—(1)** Section 22 (earnings factors) is amended as follows.

**(2)** In subsection (2)—

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- (a) in paragraph (a), omit the final “and”;
  - (b) after paragraph (b) insert “; and
  - (c) establishing entitlement to a state pension under Part 1 of the Pensions Act (Northern Ireland) 2015 and, where relevant, calculating the rate of a state pension under that Part.”.
- (3) After subsection (5) insert—
- “(5ZA) Regulations may provide for crediting—
- (a) for 1987-88 or any subsequent tax year, earnings or Class 2 or Class 3 contributions, or
  - (b) for any earlier tax year, contributions of any class,
- for the purposes of bringing an earnings factor for that tax year to a figure which will make that year a “qualifying year”, “pre-commencement qualifying year” or “post-commencement qualifying year” of a person for the purposes of Part 1 of the Pensions Act (Northern Ireland) 2015 (see sections 2(4) and 4(4) of that Act).
- (5ZB) Regulations under subsection (5ZA) must provide for crediting a person with such contributions as may be specified in respect of periods on or after 6 April 1975 during which the person was—
- (a) a spouse or civil partner of a member of Her Majesty's forces,
  - (b) accompanying the member on an assignment outside the United Kingdom, and
  - (c) not of a description specified in the regulations.”.

#### Commencement Information

- I6** [Sch. 12 para. 6\(1\)](#) in operation at 25.2.2016 for specified purposes by [S.R. 2016/68, art. 2\(e\)](#)
- I7** [Sch. 12 para. 6\(3\)](#) in operation at 25.2.2016 for specified purposes by [S.R. 2016/68, art. 2\(f\)](#)

VALID FROM 06/04/2016

**7** In section 121(1) (interpretation), in the definition of “benefit”, after paragraph (c) insert— “ (For the meaning of benefit” in Part 1, see also section 19B). ”.

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#### Commencement Information

**18** Sch. 12 para. 7 in operation at 6.4.2016, see s. 53(1)(3)

*The Social Security Administration (Northern Ireland) Act 1992 (c. 8)*

**8** The Administration Act is amended as follows.

#### Commencement Information

**19** Sch. 12 para. 8 in operation at 14.9.2015 for specified purposes by S.R. 2015/329, art. 2(2)(a)

VALID FROM 06/04/2016

**9** In section 1 (entitlement to benefit dependent on claim), in subsection (4), before paragraph (a) insert—

“(zb) state pension or a lump sum under Part 1 of the Pensions Act (Northern Ireland) 2015;”.

#### Commencement Information

**110** Sch. 12 para. 9 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

**10** In section 5 (regulations about claims for and payments of benefits), in subsection (2), before paragraph (a) insert—

“(zb) state pension or a lump sum under Part 1 of the Pensions Act (Northern Ireland) 2015;”.

#### Commencement Information

**111** Sch. 12 para. 10 in operation at 6.4.2016, see s. 53(1)(3)

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VALID FROM 06/04/2016

**11** In section 69 (overpayments - general), in subsection (11), before paragraph (a) insert—

“(za) state pension or a lump sum under Part 1 of the Pensions Act (Northern Ireland) 2015;”.

**Commencement Information**

**I12** Sch. 12 para. 11 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

**12** In section 71 (overlapping benefits - general)—

(a) in subsection (1), after “adjusting” insert “ state pension under Part 1 of the Pensions Act (Northern Ireland) 2015 or ”;

(b) in subsection (4), before paragraph (a) insert—

“(za) state pension under Part 1 of the Pensions Act (Northern Ireland) 2015;”.

**Commencement Information**

**I13** Sch. 12 para. 12 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

**13** In section 115CA (interpretation of Part 6), in subsection (1), before paragraph (i) insert—

“(hl) Part 1 of the Pensions Act (Northern Ireland) 2015;”.

**Commencement Information**

**I14** Sch. 12 para. 13 in operation at 6.4.2016, see s. 53(1)(3)

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VALID FROM 06/04/2016

**14** In section 116B (supply of other government information for fraud prevention and verification), in subsection (3)(b), before “or this Act” insert “, Part 1 of the Pensions Act (Northern Ireland) 2015 ”.

**Commencement Information**

**I15** Sch. 12 para. 14 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

**15** In section 118 (regulations as to notification of deaths), in subsection (1), before “and this Act” insert “, Part 1 of the Pensions Act (Northern Ireland) 2015 ”.

**Commencement Information**

**I16** Sch. 12 para. 15 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

**16** After section 130AB insert—

**“130AC Revaluation for transitional pensions under Pensions Act (Northern Ireland) 2015**

(1) Whenever the Secretary of State makes an order under section 148AC of the Great Britain Administration Act (revaluation for transitional pensions under Pensions Act 2014), the Department may make a corresponding order for Northern Ireland.

(2) The percentage specified in an order under subsection (1) is the “revaluing percentage” for the purposes of paragraph 6(5) of Schedule 1 to the Pensions Act (Northern Ireland) 2015.”.

**Commencement Information**

**I17** Sch. 12 para. 16 in operation at 6.4.2016, see s. 53(1)(3)

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VALID FROM 06/04/2016

17 After section 132A insert—

**“132B Up-rating of transitional state pensions under Pensions Act (Northern Ireland) 2015**

**132B** Whenever the Secretary of State makes an order under section 151A of the Great Britain Administration Act (up-rating of transitional state pensions under Pensions Act 2014), the Department may make a corresponding order for Northern Ireland.”.

**Commencement Information**

**I18** Sch. 12 para. 17 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

**18.—(1)** Section 135A (power to anticipate pensions up-rating order) is amended as follows.

(2) In subsection (1)(a)—

(a) for “150 or 150A” substitute “ 150, 150A or 151A ”;

(b) in sub-paragraph (i), after “by way of” insert “ state pension under the Pensions Act (Northern Ireland) 2015, ”.

(3) In subsection (2), after “an award is made of” insert “ a state pension, ”.

**Commencement Information**

**I19** Sch. 12 para. 18 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

**19.—(1)** Section 143 (general financial arrangements) is amended as follows.

(2) In subsection (1), before paragraph (a) insert—

“(za) state pension and lump sums under Part 1 of the Pensions Act (Northern Ireland) 2015;”.

(3) In subsection (2)(a), after “Contributions and Benefits Act” insert “ , Part 1 of the Pensions Act (Northern Ireland) 2015 ”.

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(4) In subsection (3)(b), after “that Act” insert “ or Part 1 of the Pensions Act (Northern Ireland) 2015 ”.

#### Commencement Information

**I20** Sch. 12 para. 19 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

**20** In section 149 (Social Security Advisory Committee), in subsection (5) in the definition of “the relevant enactments”, before paragraph (b) insert—

“(am) the provisions of Part 1 of the Pensions Act (Northern Ireland) 2015;”.

#### Commencement Information

**I21** Sch. 12 para. 20 in operation at 6.4.2016, see s. 53(1)(3)

**21.**—(1) Section 155 (reciprocal agreements) is amended as follows.

(2) In subsection (3)(a), before “and the Contributions and Benefits Act” insert “, Part 1 of the Pensions Act (Northern Ireland) 2015 ”.

(3) In subsection (4), before paragraph (b) insert—

“(ag) to Part 1 of the Pensions Act (Northern Ireland) 2015;”.

(4) In subsection (5)—

(a) after “Act 2007” insert “ or Part 1 of the Pensions Act (Northern Ireland) 2015 ”;

(b) after paragraph (ac) insert—

“(ad) state pension under Part 1 of the Pensions Act (Northern Ireland) 2015;”.

#### Commencement Information

**I22** Sch. 12 para. 21 in operation at 14.9.2015 by S.R. 2015/329, art. 2(2)(c)

VALID FROM 06/04/2016

**22** In section 163 (inalienability), in subsection (1), before paragraph (a) insert—

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“(zb) state pension under Part 1 of the Pensions Act (Northern Ireland) 2015;”.

**Commencement Information**

**I23** Sch. 12 para. 22 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

**23** In section 166 (Assembly control of orders and regulations), in subsection (2)(b) after “132A,” insert “ 132B, ”.

**Commencement Information**

**I24** Sch. 12 para. 23 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

**24** In section 167(1) (interpretation), in the definition of “benefit”, before “a jobseeker's allowance” insert “ state pension under Part 1 of the Pensions Act (Northern Ireland) 2015, ”.

**Commencement Information**

**I25** Sch. 12 para. 24 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

*The Social Security (Northern Ireland) Order 1993 (NI 2)*

**25** In Article 4 of the Social Security (Northern Ireland) Order 1993 (payments into National Insurance Fund out of appropriated money) in paragraph (1) in the definition of “estimated benefit expenditure”, in paragraph (a) after “paragraphs” insert “ (za), ”.

**Commencement Information**

**I26** Sch. 12 para. 25 in operation at 6.4.2016, see s. 53(1)(3)

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VALID FROM 06/04/2016

*The Pensions (Northern Ireland) Order 1995 (NI 22)*

**26** In Schedule 2 to the 1995 Order (pensionable age), in paragraph 1, for “and Part 1 of the Welfare Reform Act (Northern Ireland) 2007” substitute “, Part 1 of the Welfare Reform Act (Northern Ireland) 2007 and the Pensions Act (Northern Ireland) 2015 ”.

**Commencement Information**

**127** Sch. 12 para. 26 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

*The Social Security (Northern Ireland) Order 1998 (NI 10)*

**27** The Social Security (Northern Ireland) Order 1998 is amended as follows.

**Commencement Information**

**128** Sch. 12 para. 27 in operation at 6.4.2016, see s. 53(1)(3)

**28** In Article 4 (use of computers), in paragraph (2) at the end insert “or (m) Part 1 of the Pensions Act (Northern Ireland) 2015.”.

**Commencement Information**

**129** Sch. 12 para. 28 in operation at 6.4.2016, see s. 53(1)(3)

**29** In Article 9 (decisions by the Department)—

(a) in paragraph (3), before sub-paragraph (b) insert—

“(ab) state pension or a lump sum under Part 1 of the Pensions Act (Northern Ireland) 2015;”;

(b) in paragraph (4), before “other than” insert “ or Part 1 of the Pensions Act (Northern Ireland) 2015 ”.

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#### Commencement Information

**I30** Sch. 12 para. 29 in operation at 6.4.2016, see s. 53(1)(3)

**30** In Article 12 (regulations with respect to decisions), in paragraph (3), in the definition of “the current legislation”, at the end insert “ and Part 1 of the Pensions Act (Northern Ireland) 2015 ”.

#### Commencement Information

**I31** Sch. 12 para. 30 in operation at 6.4.2016, see s. 53(1)(3)

**31** In Article 27 (restrictions on entitlement to benefit in certain cases of error), in paragraph (7), in the definition of “benefit”, after paragraph (f) insert “and

(g) state pension or a lump sum under Part 1 of the Pensions Act (Northern Ireland) 2015.”.

#### Commencement Information

**I32** Sch. 12 para. 31 in operation at 6.4.2016, see s. 53(1)(3)

**32** In Article 28 (correction of errors in decisions etc.), in paragraph (3) at the end insert “or

(j) Part 1 of the Pensions Act (Northern Ireland) 2015.”.

#### Commencement Information

**I33** Sch. 12 para. 32 in operation at 6.4.2016, see s. 53(1)(3)

**33** In Schedule 3 (decisions against which an appeal lies), before paragraph 7 insert—

*“State pension: prisoners and overseas residents*

**6C** A decision that a state pension under Part 1 of the Pensions Act (Northern Ireland) 2015 is not payable by reason of section 19 of that Act (prisoners).

**6D** A decision that a person is not entitled to increases in the rate of a state pension under Part 1 of the Pensions Act (Northern Ireland) 2015 by reason of regulations under section 20 of that Act (overseas residents).”.

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#### Commencement Information

**I34** [Sch. 12 para. 33](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

VALID FROM 06/04/2016

#### *The Child Support, Pensions and Social Security Act (Northern Ireland) 2000 (c. 4)*

**34.**—(1) Section 38 of the Child Support, Pensions and Social Security Act (Northern Ireland) 2000 (disclosure of state pension information) is amended as follows.

(2) In subsection (7), after paragraph (a) insert—

“(aa) the amount of any state pension under Part 1 of the Pensions Act (Northern Ireland) 2015 a present or future entitlement to which has already accrued to that individual;

(ab) a projection of the amount of any state pension under Part 1 of the Pensions Act (Northern Ireland) 2015 to which that individual is likely to become entitled, or might become entitled in particular circumstances;”.

(3) In subsection (11), in the definition of “lump sum”, after “under” insert “section 8 of the Pensions Act (Northern Ireland) 2015 or”.

#### Commencement Information

**I35** [Sch. 12 para. 34](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

VALID FROM 06/04/2016

#### *The Social Security Fraud Act (Northern Ireland) 2001 (c. 17)*

**35** The Social Security Fraud Act (Northern Ireland) 2001 is amended as follows.

#### Commencement Information

**I36** [Sch. 12 para. 35](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

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**36** In section 5A (definitions), in the definition of “disqualifying benefit”, before paragraph (a) insert—

“(zb) state pension or a lump sum under Part 1 of the Pensions Act (Northern Ireland) 2015 or under Part 1 of the Pensions Act 2014;”.

**Commencement Information**

**I37** Sch. 12 para. 36 in operation at 6.4.2016, see s. 53(1)(3)

**37** In section 9 (power to supplement and mitigate loss of benefit provisions), in subsection (3), before paragraph (c) insert—

“(bf) state pension or a lump sum under Part 1 of the Pensions Act (Northern Ireland) 2015 or under Part 1 of the Pensions Act 2014;”.

**Commencement Information**

**I38** Sch. 12 para. 37 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

*The State Pension Credit Act (Northern Ireland) 2002 (c. 14)*

**38** The State Pension Credit Act (Northern Ireland) 2002 is amended as follows.

**Commencement Information**

**I39** Sch. 12 para. 38 in operation at 6.4.2016, see s. 53(1)(3)

**39** In section 7 (fixing of claimant's retirement provision for assessed income period), in subsection (6)(a), after “benefit under” insert “ Part 1 of the Pensions Act (Northern Ireland) 2015 or ”.

**Commencement Information**

**I40** Sch. 12 para. 39 in operation at 6.4.2016, see s. 53(1)(3)

**40** In section 16 (meaning of “retirement pension income”), in subsection (1), before paragraph (a) insert—

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“(za) a state pension under Part 1 of the Pensions Act (Northern Ireland) 2015 or under Part 1 of the Pensions Act 2014;”.

**Commencement Information**

**I41** Sch. 12 para. 40 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

*The Gender Recognition Act 2004 (c. 7)*

**41** The Gender Recognition Act 2004 is amended as follows.

**Commencement Information**

**I42** Sch. 12 para. 41 in operation at 6.4.2016, see s. 53(1)(3)

**42** In section 23(3) and (4) of that Act (power to modify statutory provisions) “enactment” includes sections 11 and 12 of, and Schedules 6 and 7 to, this Act.

**Commencement Information**

**I43** Sch. 12 para. 42 in operation at 6.4.2016, see s. 53(1)(3)

**43.—**(1) Schedule 5 (benefits and pensions) is amended as follows.

(2) After paragraph 6A insert—

**“Pension under Part 1 of the Pensions Act (Northern Ireland) 2015**

**6B.—**(1) Any question—

(a) whether the person is entitled to a state pension under Part 1 of the Pensions Act (Northern Ireland) 2015 for any period after the certificate is issued, and

(b) (if so) the rate at which the person is so entitled for the period, is to be decided as if the person's gender were the acquired gender.

(2) Accordingly, if (immediately before the certificate is issued) the person—

(a) is a woman entitled to a state pension under Part 1 of the Pensions Act (Northern Ireland) 2015, but

(b) has not attained the age of 65,

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the person ceases to be so entitled when it is issued.

(3) And, conversely, if (immediately before the certificate is issued) the person—

(a) is a man who has attained the age at which a woman of the same age attains pensionable age, but

(b) has not attained the age of 65,

the person is to be treated for the purposes of Part 1 of the Pensions Act (Northern Ireland) 2015 as attaining pensionable age when it is issued.

(4) But sub-paragraph (1) does not apply if and to the extent that the decision of any question to which it refers is affected by the payment or crediting of contributions, or the crediting of earnings, in respect of a period ending before the certificate is issued.

(5) If the person's acquired gender is the male gender, sections 11 and 12 of, and Schedules 6 and 7 to, the Pensions Act (Northern Ireland) 2015 (effect of reduced rate elections) apply in relation to the person as they apply in relation to a woman (but only once the person has reached pensionable age for a man).

(6) Paragraph 10 makes provision about deferment of state pensions under Part 1 of the Pensions Act (Northern Ireland) 2015.”.

(3) In paragraph 10, in sub-paragraph (1), after paragraph (za) insert—

“(zb) a state pension under Part 1 of the Pensions Act (Northern Ireland) 2015.”.

#### Commencement Information

**I44** [Sch. 12 para. 43](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

VALID FROM 17/02/2016

### *The Welfare Reform Act (Northern Ireland) 2015*

**44** <sup>F1</sup> .....

#### Textual Amendments

**F1** [Sch. 12 para. 44](#) omitted (17.2.2016) before coming into operation by virtue of [The Welfare Reform \(Northern Ireland\) Order 2015 \(S.I. 2015/2006\)](#), [arts. 2\(2\)](#), [102\(3\)](#); [S.R. 2016/46](#), [art. 3\(4\)\(a\)](#)

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VALID FROM 06/04/2016

## PART 2

### AMENDMENTS TO DO WITH OLD STATE PENSION SYSTEM

#### *Graduated retirement benefit*

**45.**—(1) Section 35 of the National Insurance Act (Northern Ireland) 1966 (graduated retirement benefit), so far as continuing in operation, is amended as follows.

(2) In subsection (7), for “has attained pensionable age” substitute “attained pensionable age before 6 April 2016”.

(3) In subsection (8), in the definition of “retirement pension”, after “any category” insert “under the Social Security Contributions and Benefits (Northern Ireland) Act 1992”.

#### **Commencement Information**

**I45** Sch. 12 para. 45 in operation at 6.4.2016, see s. 53(1)(3)

#### *Category A retirement pensions*

**46** The Contributions and Benefits Act is amended as follows.

#### **Commencement Information**

**I46** Sch. 12 para. 46 in operation at 6.4.2016, see s. 53(1)(3)

**47** In section 44(1) (Category A retirement pension), for paragraph (a) substitute—

“(a) the person attained pensionable age before 6 April 2016.”.

#### **Commencement Information**

**I47** Sch. 12 para. 47 in operation at 6.4.2016, see s. 53(1)(3)

**48.**—(1) Section 48 (use of former spouse's contributions) is amended as follows.

(2) In subsection (1), after “person” insert “who attained pensionable age before 6 April 2016”.

*Status: Point in time view as at 16/07/2015. This version of this schedule contains provisions that are not valid for this point in time.*

*Changes to legislation: Pensions Act (Northern Ireland) 2015, SCHEDULE 12 is up to date with all changes known to be in force on or before 06 April 2024. There are changes that may be brought into force at a future date. Changes that have been made appear in the content and are referenced with annotations. (See end of Document for details)*

(3) After subsection (2) insert—

“(2A) Regulations under subsection (1) may not provide for contributions of a person in respect of times on or after 6 April 2016 to be treated as contributions of another person.”.

**Commencement Information**

**148** [Sch. 12 para. 48](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

*Category B retirement pensions*

**49** The Contributions and Benefits Act is amended as follows.

**Commencement Information**

**149** [Sch. 12 para. 49](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

**50** In section 23A (contributions credits for relevant parents and carers) in subsection (1)(b), after “section 48A” insert “ or 48AA ”.

**Commencement Information**

**150** [Sch. 12 para. 50](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

**51** In section 46 (modification of section 45 for calculating additional pension in certain benefits), in subsection (2), omit “48A(4) or” (in both places).

**Commencement Information**

**151** [Sch. 12 para. 51](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

**52** For section 48A substitute—

**“48A Category B retirement pension for married person or civil partner**

(1) A married person is entitled to a Category B retirement pension by virtue of the contributions of his or her spouse if—

- (a) the person attained pensionable age before 6 April 2016, and
- (b) the spouse—
  - (i) has attained pensionable age, and
  - (ii) satisfies the relevant contribution condition.

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(2) But subsection (1) does not confer a right to a Category B retirement pension on a man whose spouse was born before 6 April 1950.

(3) A person who is a civil partner is entitled to a Category B retirement pension by virtue of the contributions of his or her civil partner (“the contributing civil partner”) if—

(a) the person attained pensionable age before 6 April 2016, and

(b) the contributing civil partner—

(i) was born on or after 6 April 1950,

(ii) has attained pensionable age, and

(iii) satisfies the condition in paragraph 5A of Schedule 3.

(4) A Category B retirement pension payable under this section is payable at the weekly rate specified in paragraph 5 of Part 1 of Schedule 4.

(5) A person ceases to be entitled to a Category B retirement pension under this section if—

(a) the person's spouse or civil partner dies (but see sections 48B and 51), or

(b) the person otherwise ceases to be married or in the civil partnership (but see section 48AA).

(6) In subsection (1)(b)(ii) “the relevant contribution condition” means—

(a) in a case where the spouse was born before 6 April 1945, the conditions in paragraph 5 of Schedule 3;

(b) in any other case, the condition in paragraph 5A of Schedule 3.

(7) For the purposes of any provision of this Act as it applies in relation to this section, no account is to be taken of any earnings factors of the spouse or contributing civil partner for the tax year beginning with 6 April 2016 or any later tax year.

#### **48AA Category B retirement pension for divorcee or former civil partner**

(1) A person who has been in a marriage that has been dissolved is entitled to a Category B retirement pension by virtue of the contributions of his or her former spouse if—

(a) the person attained pensionable age—

(i) before 6 April 2016, and

(ii) before the marriage was dissolved, and

(b) the former spouse—

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(i) attained pensionable age before the marriage was dissolved, and

(ii) satisfied the relevant contribution condition.

(2) But subsection (1) does not confer a right to a Category B retirement pension on a man whose former spouse was born before 6 April 1950.

(3) A person who has been in a civil partnership that has been dissolved is entitled to a Category B retirement pension by virtue of the contributions of his or her former civil partner if—

(a) the person attained pensionable age—

(i) before 6 April 2016, and

(ii) before the civil partnership was dissolved, and

(b) the former civil partner—

(i) was born on or after 6 April 1950,

(ii) attained pensionable age before the civil partnership was dissolved, and

(iii) satisfied the condition in paragraph 5A of Schedule 3.

(4) During any period when the person's former spouse or civil partner is alive, a Category B retirement pension payable under this section is payable at the weekly rate specified in paragraph 5 of Part 1 of Schedule 4.

(5) During any period after the person's former spouse or civil partner is dead, a Category B retirement pension payable under this section is payable at the weekly rate of the basic pension specified in section 44(4).

(6) In subsection (1)(b)(ii) “the relevant contribution condition” means—

(a) in a case where the former spouse was born before 6 April 1945, the conditions in paragraph 5 of Schedule 3;

(b) in any other case, the condition in paragraph 5A of Schedule 3.

(7) For the purposes of any provision of this Act as it applies in relation to this section, no account is to be taken of any earnings factors of the former spouse or civil partner for the tax year beginning with 6 April 2016 or any later tax year.

(8) A voidable marriage or civil partnership which has been annulled is to be treated for the purposes of this section as if it had been a valid marriage or civil partnership which was dissolved at the date of annulment.”.

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### Commencement Information

**I52** Sch. 12 para. 52 in operation at 6.4.2016, see s. 53(1)(3)

**53.**—(1) Section 48B (Category B retirement pension for widows and widowers) is amended as follows.

(2) For subsections (1) to (1A) substitute—

“(1) A person (“the pensioner”) whose spouse died while they were married is entitled to a Category B retirement pension by virtue of the contributions of his or her spouse if—

(a) the pensioner attained pensionable age—

(i) before 6 April 2016, and

(ii) before the spouse died, and

(b) the spouse satisfied the relevant contribution condition.

(1ZA) But subsection (1) does not confer a right to a Category B retirement pension on a man who attained pensionable age before 6 April 2010.

(1ZB) In subsection (1)(b) “the relevant contribution condition” means—

(a) in a case where the spouse—

(i) died before 6 April 2010, or

(ii) died on or after that date having attained pensionable age before that date,

the conditions in paragraph 5 of Schedule 3, and

(b) in any other case, the condition in paragraph 5A of Schedule 3.

(1A) A person (“the pensioner”) whose civil partner died while they were civil partners of each other is entitled to a Category B retirement pension by virtue of the contributions of his or her civil partner if—

(a) the pensioner attained pensionable age—

(i) on or after 6 April 2010 but before 6 April 2016, and

(ii) before the civil partner died, and

(b) the civil partner satisfied the relevant contribution condition.

(1B) In subsection (1A)(b) “the relevant contribution condition” means—

(a) in a case where the deceased civil partner attained pensionable age before 6 April 2010, the conditions in paragraph 5 of Schedule 3, and

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(b) in any other case, the condition in paragraph 5A of Schedule 3.”.

(3) After subsection (3) insert—

“(3A) For the purposes of any provision of this Act as it applies in relation to this section, no account is to be taken of any earnings factors of the deceased for the tax year beginning with 6 April 2016 or any later tax year.”.

(4) For subsection (4) substitute—

“(4) A woman (“the pensioner”) whose husband died before she attained pensionable age is entitled to a Category B retirement pension by virtue of the contributions of her husband if—

- (a) she attained pensionable age before 6 April 2016, and
- (b) the condition in subsection (5) is satisfied.

(4A) A man (“the pensioner”) whose wife died before he attained pensionable age is entitled to a Category B retirement pension by virtue of the contributions of his wife if—

- (a) he attained pensionable age on or after 6 April 2010 but before 6 April 2016, and
- (b) the condition in subsection (5) would have been satisfied on the assumption mentioned in subsection (7).”.

(5) In subsection (6), after “subsection (4)” insert “ or (4A) ”.

(6) In subsection (7), for “(4)” substitute “ (4A) ”.

#### Commencement Information

**I53** [Sch. 12 para. 53](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

**54.—**(1) Section 48BB (Category B retirement pension: entitlement by reference to widowed parent's allowance or bereavement allowance where no dependent children) is amended as follows.

(2) In subsection (1), for “who has attained pensionable age” substitute “ who attained pensionable age before 6 April 2016 ”.

(3) In subsection (3), for “who has attained pensionable age” substitute “ who attained pensionable age before 6 April 2016 ”.

#### Commencement Information

**I54** [Sch. 12 para. 54](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

**55.—**(1) Section 48C (Category B retirement pension: general) is amended as follows.

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(2) In subsection (3), for “sections 48A(4)(b) and” substitute “ section ”.

(3) In subsection (4), omit “48A(4),”.

#### Commencement Information

**I55** Sch. 12 para. 55 in operation at 6.4.2016, see s. 53(1)(3)

**56** For section 51 substitute—

#### **“51 Category B retirement pension for widowers and surviving civil partners who attained pensionable age before 6 April 2010**

(1) A man (the pensioner) whose wife died while they were married is entitled to a Category B retirement pension if—

- (a) they were both over pensionable age at the time of the death,
- (b) the pensioner attained pensionable age before 6 April 2010, and
- (c) the wife satisfied the relevant contribution condition.

(2) But subsection (1) does not confer a right to a Category B retirement pension on a man whose wife died before 6 April 1979.

(3) In subsection (1)(c) “the relevant contribution condition” means—

- (a) in a case where the spouse attained pensionable age before 6 April 2010, the conditions in paragraph 5 of Schedule 3, and
- (b) in a case where the spouse attained pensionable age on or after 6 April 2010, the condition in paragraph 5A of Schedule 3.

(4) A person (“the pensioner”) whose civil partner died while they were civil partners of each other is entitled to a Category B retirement pension if—

- (a) they were both over pensionable age at the time of the death,
- (b) the pensioner attained pensionable age before 6 April 2010, and
- (c) the deceased civil partner satisfied the relevant contribution condition.

(5) In subsection (4)(c) “the relevant contribution condition” means—

- (a) in a case where the deceased civil partner attained pensionable age before 6 April 2010, the conditions in paragraph 5 of Schedule 3, and
- (b) in a case where the deceased civil partner attained pensionable age on or after 6 April 2010, the condition in paragraph 5A of Schedule 3.

(6) The weekly rate of a person's Category B retirement pension under this section is to be determined in accordance with sections 44 to 45AA

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and Schedule 4A as they apply in the case of a Category A retirement pension taking references in those sections to the pensioner as references to the spouse or deceased civil partner.

(7) But in the case of—

- (a) a man whose wife dies after 5 October 2002, or
- (b) a surviving civil partner,

any amount of additional pension falling to be calculated under subsection (6) is to be halved.

(8) For the purposes of any provision of this Act as it applies in relation to this section, no account is to be taken of any earnings factors of the spouse or deceased civil partner for the tax year beginning with 6 April 2016 or any later tax year.

(9) Subject to the provisions of this Act, a person becomes entitled to a Category B retirement pension under this section on the day on which the conditions of entitlement become satisfied and the entitlement continues throughout the person's life.”.

#### Commencement Information

**156** [Sch. 12 para. 56](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

**57** In section 52(3) (special provision for surviving spouses) for “prescribed maximum” substitute “ maximum amount specified in regulations ”.

#### Commencement Information

**157** [Sch. 12 para. 57](#) in operation at 6.4.2016, see [s. 53\(1\)\(3\)](#)

**58.**—(1) Schedule 3 (contribution conditions for entitlement to benefit) is amended as follows.

(2) In paragraph 5, for sub-paragraph (1) substitute—

“(1) This paragraph sets out the contribution conditions for—

- (a) a widowed mother's allowance, a widowed parent's allowance or a widow's pension;
- (b) a Category A retirement pension (other than one in relation to which paragraph 5A applies);
- (c) a Category B retirement pension in the cases provided for by any of sections 48A to 51.”.

(3) In paragraph 5A(1), for paragraphs (b) and (c) substitute—

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“(b) a Category B retirement pension in the cases provided for by any of sections 48A to 51.”.

**Commencement Information**

**I58** Sch. 12 para. 58 in operation at 6.4.2016, see s. 53(1)(3)

**59** In Part 1 of Schedule 4 (rates of certain benefits), in paragraph 5, for “section 48A(3)” substitute “ section 48A(4) or 48AA(4) ”.

**Commencement Information**

**I59** Sch. 12 para. 59 in operation at 6.4.2016, see s. 53(1)(3)

**60** In Schedule 4A (additional pension: accrual rates for purposes of section 45(2)(c)), in paragraph 1(2), omit “, 48A(4)” (in both places).

**Commencement Information**

**I60** Sch. 12 para. 60 in operation at 6.4.2016, see s. 53(1)(3)

**61** In section 42 of the Pension Schemes Act (effect of entitlement to guaranteed minimum pensions on payment of social security benefits), in subsection (6), omit “48A.”.

**Commencement Information**

**I61** Sch. 12 para. 61 in operation at 6.4.2016, see s. 53(1)(3)

**62** In Article 125 of the 1995 Order (additional pension: calculation of surpluses), in paragraph (6), omit “48A.”.

**Commencement Information**

**I62** Sch. 12 para. 62 in operation at 6.4.2016, see s. 53(1)(3)

**63** In Schedule 2 to the 1995 Order (equalisation of, and increase in, pensionable age for men and women), omit paragraph 3(2) and (3).

**Commencement Information**

**I63** Sch. 12 para. 63 in operation at 6.4.2016, see s. 53(1)(3)

**64** In Schedule 24 to the Civil Partnership Act 2004, omit paragraphs 79(6) and 82(6).

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#### Commencement Information

**I64** Sch. 12 para. 64 in operation at 6.4.2016, see s. 53(1)(3)

#### *Category C retirement pensions: repeal of spent provisions*

**65** The Contributions and Benefits Act is amended as follows.

#### Commencement Information

**I65** Sch. 12 para. 65 in operation at 6.4.2016, see s. 53(1)(3)

**66** In section 63(f)(i) (descriptions of non-contributory benefits), for the words from “payable” to “widows” substitute “ payable in certain cases to a widow whose husband was over pensionable age on 5 July 1948 or to a woman whose marriage to a husband who was over pensionable age on that date was terminated otherwise than by his death ”.

#### Commencement Information

**I66** Sch. 12 para. 66 in operation at 6.4.2016, see s. 53(1)(3)

**67.**—(1) Section 78 (Category C retirement pensions etc.) is amended as follows.

- (2) Omit subsections (1), (2) and (5).
- (3) In subsections (7) and (8), omit “Category C or”.

#### Commencement Information

**I67** Sch. 12 para. 67 in operation at 6.4.2016, see s. 53(1)(3)

**68** In Part 3 of Schedule 4—

- (a) omit paragraph 6 (rate of Category C retirement pension);
- (b) in paragraph 7 (rate of Category D retirement pension), for the text in the second column substitute the amount specified in paragraph 6 as the higher rate for a Category C retirement pension immediately before 6 April 2016.

#### Commencement Information

**I68** Sch. 12 para. 68 in operation at 6.4.2016, see s. 53(1)(3)

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### *Category D retirement pensions*

**69** In section 78(3) of the Contributions and Benefits Act (entitlement to a Category D retirement pension), for “and satisfies” substitute “ , who reached pensionable age before 6 April 2016 and who satisfies ”.

#### **Commencement Information**

**I69** Sch. 12 para. 69 in operation at 6.4.2016, see s. 53(1)(3)

### *Age addition*

**70** In sections 63(g) and 79(1) of the Contributions and Benefits Act (age addition), after “retirement pension of any category” insert “ under this Act ”.

#### **Commencement Information**

**I70** Sch. 12 para. 70 in operation at 6.4.2016, see s. 53(1)(3)

### *Christmas bonus*

**71** In section 146(2) of the Contributions and Benefits Act (Christmas bonus: interpretation), for the definition of “retirement pension” substitute—

“retirement pension” means—

- (a) a state pension under Part 1 of the Pensions Act (Northern Ireland) 2015,
- (b) a retirement pension under this Act, or
- (c) graduated retirement benefit.”.

#### **Commencement Information**

**I71** Sch. 12 para. 71 in operation at 6.4.2016, see s. 53(1)(3)

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VALID FROM 14/09/2015

### PART 3

#### AMENDMENTS TO DO WITH STATE PENSION CREDIT

**72** The State Pension Credit Act (Northern Ireland) 2002 is amended as follows.

##### Commencement Information

**I72** Sch. 12 para. 72 in operation at 14.9.2015 for specified purposes by S.R. 2015/329, art. 2(2)(a)

VALID FROM 06/04/2016

**73** In section 3 (savings credit), for subsection (1) substitute—

“(1) The first of the conditions mentioned in section 1(2)(c)(ii) is that the claimant—

- (a) has attained pensionable age before 6 April 2016 and has attained the age of 65 (before, on or after that date), or
- (b) is a member of a couple, the other member of which falls within paragraph (a).”.

##### Commencement Information

**I73** Sch. 12 para. 73 in operation at 6.4.2016, see s. 53(1)(3)

**74** After that section insert—

##### “3ZA Power to limit savings credit for certain mixed-age couples

- (1) Regulations may provide that, in prescribed cases, a person who is a member of a mixed-age couple is not entitled to a savings credit.
- (2) For example, the regulations could provide that a member of a mixed-age couple is not entitled to a savings credit unless—
  - (a) the person has been awarded a savings credit with effect from a day before 6 April 2016 and was entitled to a savings credit immediately before that date, and

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(b) the person remained entitled to state pension credit at all times since the beginning of 6 April 2016.

(3) In this section “mixed-age couple” means a couple (whenever formed) one member of which had attained pensionable age before 6 April 2016 and the other had not.”.

**Commencement Information**

**I74** Sch. 12 para. 74 in operation at 14.9.2015 by S.R. 2015/329, art. 2(2)(c)

VALID FROM 06/04/2016

**75** In Schedule 1 to the Pensions Act (Northern Ireland) 2008, omit paragraph 41.

**Commencement Information**

**I75** Sch. 12 para. 75 in operation at 6.4.2016, see s. 53(1)(3)

## PART 4

### OTHER AMENDMENTS TO DO WITH PART 1

VALID FROM 06/04/2016

*The Social Security Contributions and Benefits (Northern Ireland) Act 1992 (c. 7)*

**76** The Contributions and Benefits Act is amended as follows.

**Commencement Information**

**I76** Sch. 12 para. 76 in operation at 6.4.2016, see s. 53(1)(3)

**77.**—(1) Section 39C (rate of widowed parent's allowance and bereavement allowance) is amended as follows.

(2) In subsection (1), for the words from “45AA” to “as they apply” substitute “45AA and Schedules 4A and 4B below as they apply”.

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(3) In subsection (3), for the words from “45AA” to “by virtue of subsection (1) above” substitute “ 45AA and Schedules 4A and 4B below by virtue of subsection (1) above ”.

(4) In subsection (4), for the words from “45AA” to “below” substitute “ 45AA and Schedules 4A and 4B below ”.

#### Commencement Information

**I77** Sch. 12 para. 77 in operation at 6.4.2016, see s. 53(1)(3)

**78.**—(1) Schedule 5 (pension increase or lump sum where entitlement to retirement pension is deferred) is amended as follows.

(2) In the following provisions omit “(as those provisions have effect by virtue of section 3(7) of the Pensions Act (Northern Ireland) 2012)”—

paragraph 4(1A)(a), (b) and (c);

paragraph 7B(5)(b)(i).

(3) After paragraph 7 insert—

**“7ZA.**—(1) This paragraph modifies paragraphs 5A to 6A in cases where—

(a) W became entitled to a Category A or Category B retirement pension before 7 June 2012, and

(b) S died before 7 June 2012.

(“W” and “S” have the same meaning as in paragraph 5.)

(2) Paragraph 5A applies as if—

(a) in sub-paragraph (2), after paragraph (a), there were inserted—

“(b) the appropriate amount; and”;

(b) in sub-paragraph (3), after “following—”, there were inserted—

“(a) one half of the appropriate amount; and”.

(3) Paragraph 6 applies as if—

(a) in sub-paragraph (2), after paragraph (a), there were inserted—

“(b) the appropriate amount; and”;

(b) in sub-paragraph (3), after paragraph (b), there were inserted—

“(c) the appropriate amount reduced by the amount of any increases under section 105 of the Pensions Act; and”;

(c) in sub-paragraph (4), after paragraph (a), there were inserted—

“(b) one half of the appropriate amount; and”.

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(4) Paragraph 6A applies as if in sub-paragraph (2), after paragraph (a), there were inserted—

“(b) one half of the appropriate amount; and”.

(5) In paragraphs 5A to 6A as modified by this paragraph, the “appropriate amount” means the greater of—

(a) the amount by which the deceased person's Category A or Category B retirement pension had been increased under section 132 of the Administration Act; or

(b) the amount by which his or her Category A or Category B retirement pension would have been so increased had he or she died immediately before the surviving spouse or civil partner became entitled to a Category A or Category B retirement pension.

(6) In sub-paragraph (1)(a) the reference to becoming entitled to a pension before 7 June 2012 includes a reference to becoming entitled on or after that day to the payment of a pension in respect of a period before that day.”.

#### Commencement Information

**178** Sch. 12 para. 78 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

#### *The Pension Schemes (Northern Ireland) Act 1993 (c. 49)*

**79** Section 42A of the Pension Schemes Act (retirement in tax year after 5 April 2020) is repealed.

#### Commencement Information

**179** Sch. 12 para. 79 in operation at 6.4.2016, see s. 53(1)(3)

VALID FROM 06/04/2016

#### *The Deregulation and Contracting Out (Northern Ireland) Order 1996 (NI 11)*

**80** In Article 17 of the Deregulation and Contracting Out (Northern Ireland) Order 1996 (social security: amendments following certain orders), at the end of paragraph (2) add “ the Pensions Act 2014 ”.

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#### Commencement Information

**I80** Sch. 12 para. 80 in operation at 6.4.2016, see s. 53(1)(3)

#### *The Pensions (No. 2) Act (Northern Ireland) 2008 (c. 13)*

**81** In the Pensions (No2) Act, the following are repealed—

- (a) sections 81 and 82 (consolidation of additional pension);
- (b) Schedule 2 (consolidation of additional pension);
- (c) in Schedule 3 (minor and consequential amendments)—
  - paragraph 4(2)(b) and (3)(b);
  - paragraph 6(3);
  - paragraph 7(a);
  - paragraph 8(a);
  - paragraph 9(2)(c);
  - paragraph 10;
  - paragraphs 13 to 22.

#### Commencement Information

**I81** Sch. 12 para. 81 in operation at 16.7.2015 by S.R. 2015/307, art. 2(1)(k)

#### *The Pensions Act (Northern Ireland) 2012 (c. 3)*

**82** In the Pensions Act (Northern Ireland) 2012, the following are repealed—

- (a) section 3(5) to (9) and Schedule 2 (abolition of certain additions to the state pension);
- (b) section 4 and Schedule 3 (consolidation of additional pension).

#### Commencement Information

**I82** Sch. 12 para. 82(b) in operation at 16.7.2015 by S.R. 2015/307, art. 2(1)(k)

**Status:**

Point in time view as at 16/07/2015. This version of this schedule contains provisions that are not valid for this point in time.

**Changes to legislation:**

Pensions Act (Northern Ireland) 2015, SCHEDULE 12 is up to date with all changes known to be in force on or before 06 April 2024. There are changes that may be brought into force at a future date. Changes that have been made appear in the content and are referenced with annotations.