CSP(NI)
Civil Service Pensions (Northern Ireland)

Department of Finance
An Roinn Airgeadais
www.finance-ni.gov.uk

Applying to join the Northern Ireland Civil Service Pension Schemes under New Fair Deal

Application Guidance

Please retain this guidance, as you may need to refer to it at a later date

Version: 4
Date: July 2026

Contents

Section 1 – Introduction

This guidance should be read by:

1. **The contracting authority/department** – individuals/teams responsible and involved in contracting, tendering and outsourcing (see "who should read this guidance?") and

2. **The prospective new employer**

It is designed to help you understand the application process for joining the Northern Ireland Civil Service Pension Schemes (NICSPS) under New Fair Deal. The Pension Schemes consist of:

- Principal Civil Service Pension Scheme (NI) (PCSPS (NI)) (Classic, Classic Plus, Premium and Nuvos) – these are all now closed to new entrants.
- The Northern Ireland Civil Service Additional Voluntary Contribution Scheme (NICSAVCS)
- Partnership Pension Account
- Designated Stakeholder Pension Scheme
- The Public Service (Civil Servants and Others) Pensions Regulations (Northern Ireland) 2014 (alpha). All active members are now in the alpha scheme.

Alpha, Nuvos, Premium, Classic Plus and Classic are no longer 'contracted out' schemes. This means the contractor and the member now pay National Insurance contributions at the standard rate. Partnership members also pay the standard rate. You can find further information on the rates you need to apply by visiting www.hmrc.gov.uk. Contracting out stopped in April 2016.

See the Department of Finance Website for an overview of the Northern Ireland Civil Service Pension Schemes. Civil Service Pensions (NI)

The Management, legislative responsibility, admissions and delivery of the Northern Ireland Civil Service Pension Schemes is the responsibility of the Department of Finance. The Department of Finance has delegated the day-to-day responsibility for the schemes to Civil Service Pensions Branch (CSP(NI)) within the Department of Finance and to the Northern Ireland Civil Service Pension Board (NICSPB).

If you have any queries about the content of this guidance, please contact CSP(NI) on 0300 077 0329 or email: cspensions@finance-ni.gov.uk

Section 2 – Who Should Read this Guidance?

This guidance has been written specifically for people in Government Departments who have the responsibility for contracting out services and staff transfers in the following situations:

1. Initial transfers also known as first generation transfers. This covers all staff transfers from the Northern Ireland Civil Service to a private sector employer who qualifies under New Fair Deal.
2. Re-tender situations where services, which have been compulsorily transferred from the Northen Ireland Civil Service, are being retendered. These are known as second generation transfers.
3. Any other situation in which a Government Department wishes to apply New Fair Deal.

In 1 & 2 above there is an expectation that New Fair Deal will apply.

In 3, the Government Department exercises its discretion under paragraph 1.32 of the HMT Fair Deal Guidance of October 2013 to allow employees to re-join the NICS Pension Schemes.

Please note the pension admission process can take a long period of time. It is essential that you share this guidance with the proposed new private sector employer, in good time to facilitate the process, if they are to join the NICS Pension Schemes.

As the sponsoring Government Department or Authority responsible for the transfer, you are obliged to ensure that Fair Deal and new Fair Deal issues are dealt with early in the process. You must notify the Department of Finance as soon as you expect that a transfer or an event, which triggers staff remaining or returning to the Northern Ireland Civil Service Pension Schemes, might take place. You should meet this obligation even before a preferred bidder is appointed.

See Fair Deal for Staff Pensions: staff transfer from central government - [Fair Deal Guidance]

Note: for ease of reference, we will use the term ‘body’ to describe to private sector employer who is seeking to participate in the NICS Pension Schemes.

Section 3 – NICSPS Eligibility and Participation

Initial Transfers:

Staff that are compulsorily transferred from central government with a contact for service into the private sector, a public service mutual or to other new models of public service delivery may retain their membership of the NICS Pension Scheme.

Retender and other situations:

To be eligible to return to the NICS Pension Scheme the employees:

1. Were originally compulsorily transferred out of the public sector,
2. Were former members of/or eligible to be members of the Northern Ireland Civil Service Pension Schemes,
3. Remain working on the transferring services,
4. Remain in/or eligible to be in a broadly comparable pension scheme; and
5. Have not otherwise lost eligibility.

Re-tendering and other second generation situations where staff are returned to the NICS Pension Scheme are complex. Legal and actuarial advice must be taken well in advance.

In all situations involving a procurement or tender process Fair Deal Pension issues must be raised early on.

Section 4 – The Admission Process

If after you have read the necessary guidance and, you still wish to apply, please complete the application form and return it to the address given at the end of this guidance.

We will review your application and send you an Admission Agreement along with guidance on completion. You will need to read the Admission Agreement carefully and take appropriate action. You must pass a copy of the Admission Agreement to the body seeking to participate in the NICS Pension Schemes. Your responsibilities and the Body's responsibilities are set out in the Admission Agreement. You will need to continue to liaise with us to ensure the body seeking admitted body status is ready for participation in the NICS Pension Schemes.

Once the Admission Agreement has been signed by the body seeking admitted body status and the Government Department responsible for the transfer of staff the Agreement must be returned to the Department of Finance for signature 2-3 weeks in advance of the transfer date.

Section 5 – Setting Up

You need to be aware that anybody joining the NICS Pension Scheme will have to meet the costs involved for on-going administration for their employees.

Administration Fee
There is an annual administration fee payable to the Department of Finance, which covers all core services. This fee is reviewed each year. Please contact CSP(NI) on 0300 077 0329 or email: cspensions@finance-ni.gov.uk for the current year's fee.

Paying Contributions and other Charges
The sums the body is required to pay are set out in the Admission Agreement and where appropriate, clarified on the scheme website.

The body will need to pay employee and employer pension contributions. Employer contributions are known as Accrued Superannuation Liability Charges (ASLCs).

Employer Contribution Rates:

EPN 02-2026 B - Reminder of ASLC rates from 1 April 2026

Employee Contribution Rates:

EPN 14-2025 B Employee Pension Contribution Rates from 1 September 2025 and applicable Salary Bands

More information is available on the Department of Finance Website.

The body will need to deduct and pay employee pension contributions. The body must not deduct contributions from employees until the Department of Finance has agreed the effective transfer date and an Admission Agreement is in place.

The body will need to discuss with their payroll (or payroll provider) how to pay over employer and employee contributions and contributions to external pension providers, where applicable. These are either paid to the Department of Finance or to the relevant external provider.

Setting up a Payroll 'Interface'
It is essential that the body has a payroll interface in place as soon as possible after staff transfer. The body's payroll team/external payroll provider must pass accurate member data to CSP(NI) on a regular basis, after the initial set up. **To do this, the**

new payroll provider must hold sufficient information about the employees. This includes, but is not exclusive to permanent pensionable allowances, and any 'one-off' pensionable payments. The body must have a pay system, which can interface with CSP(NI)'s administration software. The payroll system must provide regular updates to the member's records. As part of the process CSP(NI) will provide the new body with The Payroll Interface Developer's Guide.

Including Pensions work in the Payroll Provider's Contract

The body must ensure that their payroll or provider can carry out processes relating to the Northern Ireland Pension Schemes. At the end of each business year, the body will need to provide an assurance that their payroll or payroll provider has provided accurate data (through the interface) to CSP(NI).

The body must be able to describe:

- The development of a system that would interface with that of CSP(NI) and the processes for getting this done;
- Their ability to link every pay code to every pensions' code (identifying which pension scheme each individual is in, whether they have pensions and/or non-pensionable allowances, and 'partnership numbers');
- The ability to process partnership accounts and the related 'mini ASLC'; and
- The ability to report on employer and employee contributions.

This list is not exhaustive. They may wish to add to this list according to the level of service required from the payroll.

The body must provide details of the payroll provider as soon as possible after the award of contract. This will enable CSP(NI) to provide a unique code to identify the body as an employer who will participate in the pension schemes.

HR Staff

The body is responsible for ensuring that their HR staff fully understand their roles and responsibilities regarding pensions. While CSP(NI) will deal with the technical aspects of pensions, HR staff must understand the impact that their decisions and actions have on pensions.

Section 6 – Legacy Pension Records

The contracting authority will retain responsibility for passing on information regarding legacy pension records, including those transferred in from other government departments.

Section 7 – Communicating with Staff

In addition to provision of the materials for new entrants, the body must have robust communication channels in place to tell all their employees about the benefits of the scheme and where to get answers to their questions. They will need to consider the following:

- Easy access to member information such as the Scheme website and scheme publication.
- Access to CSP(NI)'s contact centre telephone number, which can be found on the CSP(NI) website under 'contact'

CSP(NI) will occasionally ask the body to issue a Notice to scheme members when we have an important message to be communicated. Notices will be attached to an EPN (Employer Pension Notice) that CSP(NI) will send. When communicating with their members they must ensure:

- **All** members have the chance to see these important notices.
- The body retains these notices centrally so that they have their own audit trail of pension communications and who has received them.

Section 8 – Reporting to Civil Service Pensions

Each quarter and at the end of each year, all bodies must give us information about how they have managed their responsibilities as set out in the Admission Agreement. This is done via the Annual Compliance Report and Certificate and the Quarterly Assurance Report.

The Annual Compliance Report and Certificate
The body is responsible for signing a certificate and checklist for submission to Civil Service Pensions confirming that the organisation has met its responsibilities as laid out in the Admission Agreement. The body will also need to provide a list of pension schemes members and those who have left the schemes along with their reasons for leaving and details of New Entrants.

If there are any compliance issues the body will need to list them with the remedial action being taken and when this will be completed.

The Annual Certificate covers the scheme year (1 April – 31 March). We must receive these certificates no later than 30 April of the following scheme year to meet the deadline for publishing our Accounts.

Quarterly Assurance Report
The body will be sent a Quarterly Assurance Report to complete. This report asks for confirmation that the payroll interface is in place and there are no reported issues with it or a progress report where it is still in development. The body must also provide a list of pension schemes members and those who have left the schemes along with their reasons for leaving and details of New Entrants. The body will also have the opportunity to raise any issues.

Section 9 – Next Steps

Once the initial application form has been received and an admission date agreed, CSP(NI) will send you an 'Introduction Pack', which must be shared with the body. It will contain:

- A scheme overview.
- The Payroll Interface Developer's Guide.
- Key Contact Information

Section 10 – Sources of Help and Support

Admission Process
For help on the admission process please contact cspensions@finance-ni.gov.uk

Employer Pension Notices (EPNs)
The procedures that you need to follow will be updated by Employer Pension Notices. The body must be able to access these on the CSP(NI) website. You will need to give CSP(NI) the correct distribution contact for EPNs. The contact must make sure that the information in the Notices is communicated to all relevant staff and that the appropriate actions are taken.

Employer Queries
If you cannot find the answer to a query on the CSP(NI) website, or in an Employer Pension Notice, the body should contact CSP(NI). Their contact details are on the website under 'contact'.

The website provides various important sources of information, including:

- Documentation and guidance regarding the application and administration of the New Fair Deal admission process
- Employer Pension Notices
- Employee Pension Notices
- Forms and Calculators
- Scheme publications

Please return the completed form to:

pensionspolicycsp@finance-ni.gov.uk

or

Civil Service Pensions,
Orchard House,
40 Foyle Street,
Londonderry
BT48 6AT

Please retain this guidance as you may need to refer to it at a later date.

Annex A

Application Form

Application for admission of a body to the pension schemes under new Fair Deal.

PART ONE
To be completed by the department/authority acting as the contracting authority

Name..

Department...

Postal address..

....

....

Telephone number..

Email address..

Full legal name of the body to be admitted

....

Brief Description of the function/remit of the service being transferred to the body – *this information will be published under Schedule 9, 3(6)(b) of the Public Service Pensions Act (Northern Ireland) 2014*

....

From where are the staff being transferred?

………………………………………………………………………………………………………..

(If this is not a Government Department or a body already participating in the Northern Ireland civil service pension schemes additional consideration may apply, see guidance note - re-tender and other situations above)

Please explain when staff originally transferred out of public service and from where.

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PART TWO

Please answer the following questions:

Details of body	
1	Number of staff transferring to or remaining with the body ....
2	Is the body covered by any other pension scheme? yes* ☐ no ☐ *If yes, provide outline detail. ....
3a	Please state the body's payroll provider and details of a named contact. …………………………………………………………………………………………
3b	Please confirm you have arrangements in place to transfer member details and their pension information to the body. ....
4	Please state from which date you wish admission to the NICS Pension Schemes arrangements to take effect ....
5	Contact details of the body/office you wish to be admitted. Name... Postal address.. .... Telephone number ………………………………………………………………………. Email address ....