

DoF Screening template

Screening is the first of two methods by which the necessary level of “regard” is demonstrated as being paid to the statutory equality goal, as set out in Section 75 of the Northern Ireland Act 1998. The DoF Equality Scheme commits us to screening our policies. This includes our strategies and plans, policies, legislative developments; and new ways of working such as – the introduction, change or end of an existing service, procedure, policy etc.

This screening template is designed to help business areas consider the likely equality and human rights impacts of their proposed decisions on different groups of customers, service users, staff and visitors.

Detailed information about the Section 75 equality duties and what they mean in practice is available on the Equality Commission’s website:
<http://www.equalityni.org/ECNI/media/ECNI/Publications/Employers%20and%20Service%20Providers/S75GuideforPublicAuthoritiesApril2010.pdf>

A copy of the Screening Template, for each policy screened, should be ‘signed off’ and approved by a senior manager responsible for the policy, made accessible on the DoF website as soon as possible following completion and made available in alternative formats on request.

All Section 75 consultees should be advised of the screening exercise once the final policy decision has been taken.

The screening template has 4 sections to complete. These are:

Section A - details about the policy / decision that is being screened.

Section B - 4 key questions that require you to outline the likely impacts on equality groups, and all supporting evidence.

Section C - 4 key questions in relation to obligations under the Disability Discrimination Order and the Human Rights Act.

Section D - the formal record of the screening decision.

SECTION A

Information about the policy

This stage of the screening process involves scoping the policy under consideration. The purpose of policy scoping is to help prepare the background and context and set out the aims and objectives for the policy being screened. At this stage, scoping the policy will help identify potential constraints as well as opportunities and will help the policy maker work through the screening on a step-by-step basis.

Remember that the Section 75 statutory duties apply to internal policies (relating to people who work for us) as well as external policies (relating to those who are, or could be, served by us).

Is this a new or revised policy?

Revised

It is an Amendment Scheme to the rules of the Principal Civil Service Pension Scheme (Northern Ireland), **Annex A** refers. The proposed rule amendments relate to adult survivor benefits under the 1972 ("Classic") Section of the Principal Civil Service Pension Scheme (Northern Ireland) (PCSPS(NI)).

a) Name of the policy

Principal Civil Service Pension Scheme (Amendment) Scheme (Northern Ireland) 2026

b) Brief Description of the policy

The proposed scheme amendment relates to adult survivor benefits under the 1972 ("Classic") Section of the Principal Civil Service Pension Scheme (Northern Ireland) (PCSPS(NI)) following two legal judgments ("Walker" and "Goodwin").

The proposed amendment will ensure that the PCSPS(NI) provides benefits for surviving same-sex spouses/civil partners, as well as widowers of female scheme members, that are no less favourable than

would be provided to the widow of a male member, subject to the appropriate member contributions having been made.

The changes affect adult survivor benefits under Classic in respect of service given before 6 April 1988. In addition, although not required by the equalisation stemming from the legal judgments, the proposed amendments include provision for female active and deferred members to pay extra contributions in respect of service before 1 July 1987 via a deduction from their retirement lump sum.

c) Aims of the policy/ Rationale behind the changes

It is necessary to make amendments to the rules of the PCSPS(NI) – 1972 Section (Classic) following two legal judgments ("Walker" and "Goodwin") relating to adult survivor benefits. The changes will ensure surviving male same-sex and female same-sex spouses and civil partners of public service pension scheme members will, in certain cases, receive benefits equivalent to those received by widows of opposite sex marriage. It will also ensure that Male spouses of females will receive equal survivor benefits as same-sex spouses.

d) Who will the policy affect?

Changes are required to public service pension schemes, including the Northern Ireland Civil Service Pension Scheme, to ensure an opposite sex spouse or civil partner of an eligible female scheme member will now receive the same survivor entitlements in the scheme as a same sex spouse or civil partner.

e) Is this a NICS wide policy?

Yes.

f) Who will implement the policy?

Public Service Pensions / Civil Service Pensions Policy, Legislation and Communications Branch within Pensions Division / NICSHR – Department of Finance.

- g) Will this policy or revision address an existing inequality? Yes
If yes, please give details.

In 2017, the Supreme Court handed down its judgement that Occupational pension schemes must now provide civil partners and same-sex spouses with the same survivors' benefits as opposite sex married couples.

Since 5 December 2005, it has been possible for same-sex couples to enter into "civil partnerships". The first marriages for same-sex couples took place on 29 March 2014.

Due to an exemption in the Equality Act 2010 ("EA10"), occupational pension schemes are not required to provide the same survivors' benefits to civil partners / same-sex spouses as they would to opposite sex spouses. Civil partners / same-sex spouses are only entitled to:

- contracted-out survivors' benefits relating to service on or after 6 April 1988 (the date on which contracted-out benefits for widowers were introduced) and
- all other survivors' benefits relating to service on and from 5 December 2005.

A Mr Walker brought a claim against his employer and the trustees of the Scheme of which he was a member for unlawful discrimination on the grounds of sexual orientation. (The claim related to the non-contracted-out benefits only.) Mr Walker who was in a civil partnership (later marriage) with a man brought a claim against his employer's pension scheme as the scheme calculated spouse benefits from 5 December 2005 (when civil partnerships were introduced), rather than from the start of his employment in 1980.

The Employment Tribunal found in Mr Walker's favour in 2012, but its decision was overturned by the EAT in 2014. The Court of Appeal upheld the EAT decision in 2015, broadly on the basis that Mr Walker was not entitled to claim pension rights retrospectively as a result of changes in EU law.

On 12 July 2017, the Supreme Court handed down its judgment in the case of Walker v Innospec Limited. In a landmark ruling, it overturned the Court of Appeal's 2015 judgment and unanimously agreed that Mr Walker's husband should be entitled to a full survivor's pension. It was ruled that where a pension scheme provides survivor benefits for opposite-sex spouses, it must provide the same for same-sex spouses, based on the entire duration of the marriage/partnership, not just from 2005 onwards.

Occupational pension schemes which currently restrict scheme (as opposed to contracted-out) survivors' benefits for civil partners / same-sex spouses will need to be amended to bring these benefits into line with those for opposite-sex married couples.

With respect to the Goodwin ruling Mrs Goodwin, a female member of the Teacher's Pension Scheme, brought a claim against the Department of Education in 2020. Mrs Goodwin challenged that in the event of her death, her male spouse would receive a lower survivor pension than the widower of a female member in a same-sex marriage.

An Employment Tribunal concluded that the Teachers' Pension Scheme regulations breached the non-discrimination rule in the Equality Act 2010. It found that male survivors of female members were treated less favourably than same-sex spouses.

The government concluded that this discrimination must be remedied across all public service pension schemes. Survivor benefits for male spouses of female members are now aligned with those of same-sex spouses, typically backdated to 5 December 2005.

h) Will this policy or revision benefit any Section 75 categories? Yes
If yes, please give details.

The Walker and Goodwin judgments are landmark legal rulings concerning discrimination in pension rights, specifically regarding survivor benefits for same-sex partners and male spouses of female members. Both rulings found that certain pension scheme rules were discriminatory requiring changes to ensure equal treatment. The changes implemented by this policy will ensure surviving male same-sex and female same-sex spouses and civil partners of public service pension scheme members

will, in certain cases, receive benefits equivalent to those received by widows of opposite sex marriage, and that male spouses of females will receive equal survivor benefits to same-sex spouses.

- i) Will this policy or revision have an adverse differential impact upon any of the Section 75 groupings? ~~Yes~~/No. If yes, please give details.

No. The amendment scheme does not include any provisions that would be applied differently to members of any of the protected characteristic groups and will in fact have a positive impact on some groups.

Section B

Available evidence

Evidence to help inform the screening process may take many forms. Public authorities should ensure that their screening decision is informed by relevant data.

What evidence / information (both qualitative and quantitative) have you gathered to inform this policy? Set out all evidence below along with details of the different Section 75 groups you have met and / or consulted with to help inform your screening assessment. Please also provide details of priorities and needs identified for each Section 75 group.

- **Religious belief**

There is no data available on the religious belief specific to members of the PCSPS(NI) or to alpha scheme members. However, the most recent [Equality Statistics for the Northern Ireland Civil Service for 2026](#) based on NICS staff in post at 1 January 2026 report the community background composition for the NICS as 50.8% Catholic and 49.2% Protestant. These figures exclude those with a community background recorded as 'Not Determined' (5.2%).

There is no indication that this policy will disproportionately impact on the basis of religious belief, as these Amendment Regulations will be applied equally to all relevant scheme members.

- **Political opinion**

There is no data available on the political opinion of members of the PCSPS(NI) or alpha scheme members. The NICS does not collect data on the political opinion of staff. However, there is no indication that this Amendment Scheme will disproportionately impact on the basis of political opinion, as they will be applied equally to all relevant scheme members.

- **Racial group**

The most recent [NICS Equality Statistics](#) (as of 1 January 2026) show that Ethnicity data are missing for 7.9% of staff. Of staff for whom ethnicity is available, 0.9% were from a minority ethnic group (including members of mixed ethnic groups and the Irish Travelling Community). There is no indication that this Amendment Scheme will disproportionately impact on the basis of racial group, as they will be applied equally to all relevant scheme members.

- **Age**

The age profile of the NICS pension scheme membership as of 03 July 2026 was:

AGE	ACTIVE	PARTIAL	DEFERRED	PENSIONER	Grand Total
30 and under	3,286	0	174	116	3,576
31 - 40	6,146	0	1,172	32	7,350
41 - 50	9,752	1	3,938	225	13,916
51 - 60	8,178	614	3,414	2,041	14,247
61 - 70	1,720	1,961	703	12,251	16,635
71 +	55	100	103	17,347	17,605

Grand Total	29,137	2,676	9,504	32,012	73,329
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Source: NICS Pension Scheme data

- **Marital status**

The marital composition of the NICS pension scheme membership as of 03 July 2026 was:

MARITAL STATUS	ACTIVE	PARTIAL	DEFERRED	PENSIONER	GRAND TOTAL
Single	10,522	330	1,863	2,149	14,864
Married	13,172	1,925	3,170	16,962	34,299
Civil Partner	134	1	10	25	170
Co-Habiting	256	3	44	17	320
Separated	27	11	4	45	87
Divorced	736	290	143	1,480	2,649
Ex Married	141	5	16	8	170
Widow	60	71	8	694	833
Other including unknown	4,236	34	4,288	10,833	19,391
Grand Total	29,184	2,670	9,546	32,213	73,613

Source: NICS Pension Scheme data

There is no indication that this Amendment Scheme will disproportionately impact on the basis of marital status, as they will be applied equally to all relevant scheme members.

- **Sexual orientation**

There is no data available on the sexual orientation of scheme members.

- **Men & women generally**

The gender composition of the NICS pension scheme membership as of 03 July 2026 was:

GENDER	ACTIVE	PARTIAL	DEFERRED	PENSIONER	Grand Total
FEMALE	14, 865	1,544	5,128	16,455	37,992
MALE	14,402	1,138	4,398	15,747	35,685
Grand Total	29,267	2,682	9,526	32,202	73,677

Source: NICS Pension Scheme data

There is no indication that this Amendment Scheme will disproportionately impact on the basis of men and women generally, as they will be applied equally to all relevant scheme members.

- **Disability**

There is no data available on disability of scheme members. However, the most recent [Equality Statistics for the Northern Ireland Civil Service for 2026](#) states that disability data are missing for 39% of staff. Some 6.5% of all staff were recorded as disabled. For the purposes of this report anyone whose disability information is missing (39% of staff in 2026) were allocated to the 'No disability declared' category. Potentially, therefore, the true proportion of disabled staff is therefore likely to be higher. The reported proportion of 6.5% should therefore be considered as a minimum – some staff whose disability information is missing may have a disability, and some others who are recorded as not having a disability may have developed a disability since the information was provided. Both scenarios would mean that the proportion all staff having a disability is likely to be higher.

There is no indication that this Amendment Scheme will disproportionately impact on the basis of disability as they will be applied equally to all relevant scheme members.

- **Dependents**

The dependant's composition of the NICS pension scheme membership as of 03 July 2026 was:

Dependant	No. of pensioner members
Child	901
Dependant	23
Partner	3
Spouse	11,119
Ex-Spouse	274
Total	12,320

Source: NICS Pension Scheme data

There is no indication that this Amendment Scheme will disproportionately impact on the basis of dependants, as they will be applied equally to all relevant scheme members.

If you have no evidence held, outline how you will obtain it:

Not applicable.

Screening questions

There are 4 essential screening questions:

1. What is the likely impact on equality of opportunity for those affected by this policy, for each of the nine Section 75 categories?

None

2. Are there opportunities to better promote equality of opportunity for people within the Section 75 categories?

No. The Amendment Scheme does not offer any opportunities in this respect.

3. To what extent is the policy likely to impact upon good relations between people of different religious belief, political opinion or racial group?

None, as there is no impact upon such good relations.

4. Are there opportunities to better promote good relations between these three groups?

No, as the draft Amendment Scheme relates to the NICS pension schemes and do not provide any opportunities to better promote good relations between these three groups.

Are there likely impacts on Section 75 Categories?

Religious belief:

None, as the Amendment Scheme will apply equally to all relevant scheme members regardless of religious belief.

- **Political opinion:**

None, as the Amendment Scheme will apply equally to all relevant scheme members regardless of political opinion.

- **Racial group:**

None, as the Amendment Scheme will apply equally to all relevant scheme members regardless of racial group.

- **Age:**

None - as the Amendment Scheme will apply equally to all relevant scheme members regardless of age.

- **Marital status:**

None, as the Amendment Scheme will apply equally to all relevant scheme members regardless of marital status. It will however have a positive impact on male same-sex and female same-sex spouses as well as civil partners of the NI Civil Service Pension Scheme members.

- **Sexual orientation:**

None, as the Amendment Scheme will apply equally to all relevant scheme members regardless of sexual orientation. It will however have a positive impact on same sex partners.

- **Men and women generally:**

The changes will ensure surviving male same-sex and female same-sex spouses and civil partners of public service pension scheme members will, in certain cases, receive benefits equivalent to those received by widows of opposite sex marriage.

- **Disability:**

None, as the Amendment Scheme will apply equally to all relevant scheme members regardless of disability.

- **Dependants:**

None, as the Amendment Scheme will apply equally to all relevant scheme members regardless of their being a dependent in receipt of a pension.

Additional considerations

Multiple identity

Generally speaking, people can fall into more than one Section 75 category. Taking this into consideration, are there any potential impacts of the policy/decision on people with multiple identities?

(For example; disabled minority ethnic people; disabled women; young Protestant men; and young lesbians, gay and bisexual people).

No.

Provide details of data on the impact of the policy on people with multiple identities. Specify relevant Section 75 categories concerned.

Not applicable.

Mitigation

When the public authority concludes that the likely impact is 'minor' and an equality impact assessment is not to be conducted, the public authority may consider mitigation to lessen the severity of any equality impact, or the introduction of an alternative policy to better promote equality of opportunity or good relations.

Alternatively there may already be policies in place which would mitigate any adverse impact identified.

Mitigation measures proposed:

Not applicable.

Section C

DoF also has legislative obligations to meet under the [Disability Discrimination Order](#) and the [Human Rights Act](#) . The following questions relate to these two areas.

Consideration of Disability Duties

Does the proposed policy / decision provide an opportunity for DoF to better **promote positive attitudes** towards disabled people?

Explain your assessment in full

Not applicable.

Does the proposed policy / decision provide an opportunity to actively **increase the participation** by disabled people in public life?

Explain your assessment in full

Not applicable.

Consideration of Human Rights

The Human Rights Act (HRA) 1998 brings the European Convention on Human Rights (ECHR) into UK law and it applies in N Ireland. Articles 3 and 4 are classified as “absolute” rights ie the State can never withhold or take away these rights. All others are either “qualified” or “limited”. Further information is available via the following link

<http://www.nicshumanrightsguide.com/>

Indicate any potential adverse impacts that the policy / decision may have in relation to human rights issues.

	<u>Adverse Impact</u>	
	(delete as appropriate)	
Right to Life	Article 2	No
Prohibition of torture, inhuman or degrading treatment	Article 3	No
Prohibition of slavery and forced labour	Article 4	No
Right to liberty and security	Article 5	No
Right to a fair and public trial	Article 6	No
Right to no punishment without law	Article 7	No
Right to respect for private and family life, home and correspondence	Article 8	No
Right to freedom of thought, conscience and religion	Article 9	No
Right to freedom of expression	Article 10	No
Right to freedom of peaceful assembly and association	Article 11	No

Right to marry and to found a family	Article 12	No
The prohibition of discrimination	Article 14	No
Protection of property and enjoyment of possessions	Protocol 1 Article 1	No
Right to education	Protocol 1 Article 2	No
Right to free and secret elections	Protocol 1 Article 3	No

Please indicate any ways which you consider the policy positively promotes human rights.

None. The Amendment Scheme does not provide an opportunity to positively promote human rights.

Please explain any adverse impacts on human rights that you have identified.

None.

If you have identified any adverse impacts on human rights through this screening you must complete a Human Rights Impact Assessment:
<https://www.executiveoffice-ni.gov.uk/publications/human-rights-impact-assessment-proforma>.

Monitoring Arrangements

Public authorities should consider the guidance contained in the Commission's [Monitoring Guidance for Use by Public Authorities \(July 2007\)](#):

<http://www.equalityni.org/ECNI/media/ECNI/Publications/Employers%20and%20Service%20Providers/S75MonitoringGuidance2007.pdf>

The Commission recommends that where the policy has been amended or an alternative policy introduced, the public authority should monitor more broadly than for adverse impact (See Benefits, P.9-10, paras 2.13 – 2.20 of the Monitoring Guidance).

Effective monitoring will help the public authority identify any future adverse impact arising from the policy which may lead the public authority to conduct an equality impact assessment, as well as help with future planning and policy development.

Please detail proposed monitoring arrangements below:

This screening document may be reviewed following the closure of the associated consultation.

Current data as collected and published by the NICS and Civil Service Pensions in compliance with GDPR.

Section D - Formal Record of Screening Decision

Title of Proposed Policy / Decision being screened:

Principal Civil Service Pension Scheme (Amendment) Scheme (Northern Ireland) 2026

I can confirm that the proposed policy / decision has been screened for (i) equality of opportunity, (ii) good relations disabilities duties and (iii) human rights issues

On the basis of the answers to the screening questions, I recommend that this policy / decision is –

* **Screened Out** – No EQIA necessary (no impacts)

Provide a brief note to explain how this decision was reached:

There are no unjustified adverse differential impacts for the section 75 groupings.

Screening assessment completed by -

Name Patrick Donaghey
Grade SO
Date 03 July 2026

And approved by –

Name Peter Philip
Grade G7
Date 17 July 2026

Central Support Team Notified:

Equality Contacts advised: TBC

Screening uploaded to DoF website: