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DRAFT STATUTORY INSTRUMENTS

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**2022 No.**

**The Pensions Dashboards Regulations 2022**

**PART 3**

**Requirements relating to trustees or managers  
of relevant occupational pension schemes**

**CHAPTER 1**

**Requirements relating to cooperation and connection**

**Deferred connection**

17.—(1) Where the trustees or managers wish to defer the staging deadline that applies to a pension scheme by virtue of regulation 15(2)(a), they may apply to the Secretary of State for permission to do this if—

- (a) no more than 12 months has passed since the coming into force of these Regulations;
- (b) a deferral has not been permitted in respect of the pension scheme previously;
- (c) they submit an application at least 2 months before the relevant staging deadline.

(2) If applying to defer the staging deadline that applies to a pension scheme, trustees or managers must—

- (a) submit evidence to demonstrate that at least one of the following conditions applies—
  - (i) that before the coming into force of these Regulations, they had embarked on a programme to transfer the data held by the pension scheme to a new administrator;
  - (ii) that before the coming into force of these Regulations, they had entered into a contract containing an obligation to retender the administration of the scheme, and that the timetable for this is reasonable and conflicts with the staging deadline;
- (b) submit evidence to demonstrate that complying with the staging deadline—
  - (i) would be disproportionately burdensome, or
  - (ii) would put the personal data of members at risk;
- (c) set out the steps being taken to ensure that the pension scheme can connect to the Money and Pensions Service at the earliest opportunity.

(3) The Secretary of State, following consultation with the Regulator and with the Money and Pensions Service, may by notice—

- (a) grant permission to defer the staging deadline until such a date within 12 months of the staging deadline as the Secretary of State considers appropriate (referred to in this regulation as the “agreed deadline”), or
- (b) refuse to grant permission to defer the staging deadline.

(4) Where permission is granted to defer the staging deadline under paragraph (3)(a)—

- (a) the agreed deadline remains fixed, even if there is a change in the classification of the scheme type or in its size, unless—
    - (i) permission to connect early is given under regulation 16, or
    - (ii) all the members of the scheme become pensioner members;
  - (b) the connection window for the scheme is the period of one month leading up to and including the agreed deadline.
- (5) Once permission has been granted to defer the staging deadline under paragraph (3)(a), trustees or managers must—
- (a) register the scheme with the Money and Pensions Service, having regard to the guidance referred to in regulation 15(2)(d);
  - (b) connect the pension scheme to the Money and Pensions Service within the connection window referred to in paragraph (4)(b), in compliance with the standards referred to in regulation 15(2)(c) and having regard to the guidance referred to in regulation 15(2)(d);
  - (c) meet the requirements in regulation 15(4) and (5).