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# Social Security Contributions and Benefits (Northern Ireland) Act 1992

## 1992 CHAPTER 7

### PART II

#### CONTRIBUTORY BENEFITS

##### *Benefits for widows and widowers*

#### **36 Widow's payment.**

- (1) A woman who has been widowed shall be entitled to a widow's payment of the amount specified in Schedule 4, Part II if—
  - (a) she was under pensionable age at the time when her late husband died, or he was then not entitled to a Category A retirement pension under section 44 below; and
  - (b) her late husband satisfied the contribution condition for a widow's payment specified in Schedule 3, Part I, paragraph 4.
- (2) The payment shall not be payable to a widow if she and a man to whom she is not married are living together as husband and wife at the time of her husband's death.
- (3) A widow's payment is payable only in cases where the husband dies on or after 11th April 1988 (the coming into operation of Article 37 of the 1986 Order, which introduced the widow's payment by making provision corresponding to this section).

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VALID FROM 24/04/2000

**[<sup>F1</sup>36A Cases in which sections 37 to 41 apply.**

- (1) Sections 37 to 39 and section 40 below apply only in cases where a woman's husband has died before the appointed day, and section 41 below applies only in cases where a man's wife has died before that day.
- (2) Sections 39A to 39C below apply in cases where a person's spouse dies on or after the appointed day, but section 39A also applies (in accordance with subsection (1) (b) of that section) in cases where a man's wife has died before that day.
- (3) In this section, and in sections 39A and 39B below, "the appointed day" means the day appointed for the coming into operation of Articles 51 to 53 of the Welfare Reform and Pensions (Northern Ireland) Order 1999.]

**Textual Amendments**

**F1** S. 36A inserted (24.4.2000 for specified purposes and 9.4.2001 otherwise) by S.I. 1999/3147 (N.I. 11), art. 52(1); S.R. 2000/133, art. 2(3)(a), Sch. Pt. I

**37 Widowed mother's allowance.**

- (1) A woman who has been widowed shall be entitled to a widowed mother's allowance at the rate determined in accordance with section 39 below if her late husband satisfied the contribution conditions for a widowed mother's allowance specified in Schedule 3, Part I, paragraph 5 and either—
  - (a) the woman is entitled to child benefit in respect of a child falling within subsection (2) below;
  - (b) the woman is pregnant by her late husband; or
  - (c) if the woman and her late husband were residing together immediately before the time of his death, the woman is pregnant as the result of being artificially inseminated before that time with the semen of some person other than her husband, or as the result of the placing in her before that time of an embryo, of an egg in the process of fertilisation, or of sperm and eggs.
- (2) A child falls within this subsection if one of the conditions specified in section 81(2) below is for the time being satisfied with respect to the child and the child is either—
  - (a) a son or daughter of the woman and her late husband;
  - (b) a child in respect of whom her late husband was immediately before his death entitled to child benefit; or
  - (c) if the woman and her late husband were residing together immediately before his death, a child in respect of whom she was then entitled to child benefit.
- (3) The widow shall not be entitled to the allowance for any period after she remarries, but, subject to that, she shall continue to be entitled to it for any period throughout which she satisfies the requirements of subsection (1)(a), (b) or (c) above.
- (4) A widowed mother's allowance shall not be payable—

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- (a) for any period falling before the day on which the widow's entitlement is to be regarded as commencing for that purpose by virtue of section 5(1)(l) of the Administration Act; or
- (b) for any period during which she and a man to whom she is not married are living together as husband and wife.

### **38 Widow's pension.**

- (1) A woman who has been widowed shall be entitled to a widow's pension at the rate determined in accordance with section 39 below if her late husband satisfied the contribution conditions for a widow's pension specified in Schedule 3, Part I, paragraph 5 and either—
  - (a) she was, at the husband's death, over the age of 45 but under the age of 65; or
  - (b) she ceased to be entitled to a widowed mother's allowance at a time when she was over the age of 45 but under the age of 65.
- (2) The widow shall not be entitled to the pension for any period after she remarries, but, subject to that, she shall continue to be entitled to it until she attains the age of 65.
- (3) A widow's pension shall not be payable—
  - (a) for any period falling before the day on which the widow's entitlement is to be regarded as commencing for that purpose by virtue of section 5(1)(l) of the Administration Act;
  - (b) for any period for which she is entitled to a widowed mother's allowance; or
  - (c) for any period during which she and a man to whom she is not married are living together as husband and wife.
- (4) In the case of a widow whose late husband died before 11th April 1988 and who either—
  - (a) was over the age of 40 but under the age of 55 at the time of her husband's death; or
  - (b) is over the age of 40 but under the age of 55 at the time when she ceases to be entitled to a widowed mother's allowance,subsection (1) above shall have effect as if for "45" there were substituted "40".

### **39 Rate of widowed mother's allowance and widow's pension. N.I.**

- (1) The weekly rate of—
  - (a) a widowed mother's allowance,
  - (b) a widow's pension,shall be determined in accordance with the provisions of sections 44 and 45 below as they apply in the case of a Category A retirement pension, but subject, in particular, to the following provisions of this section and section 46(2) below.
- (2) In the application of sections 44 and 45 below by virtue of subsection (1) above—
  - (a) where the woman's husband was over pensionable age when he died, references in those sections to the pensioner shall be taken as references to the husband, and
  - (b) where the husband was under pensionable age when he died, references in those sections to the pensioner and the tax year in which he attained

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pensionable age shall be taken as references to the husband and the tax year in which he died.

- (3) In the case of a woman whose husband dies after [<sup>F2</sup>5th October 2002], the additional pension falling to be calculated under sections 44 and 45 below by virtue of subsection (1) above shall (before making any reduction required by subsection (4) below) be one half of the amount which it would be apart from this subsection.
- (4) Where a widow's pension is payable to a woman who was under the age of 55 at the time when the applicable qualifying condition was fulfilled, the weekly rate of the pension shall be reduced by 7 per cent. of what it would be apart from this subsection multiplied by the number of years by which her age at that time was less than 55 (any fraction of a year being counted as a year).
- (5) For the purposes of subsection (4) above, the time when the applicable qualifying condition was fulfilled is the time when the woman's late husband died or, as the case may be, the time when she ceased to be entitled to a widowed mother's allowance.
- (6) In the case of a widow whose late husband died before 11th April 1988 and who either—
  - (a) was over the age of 40 but under the age of 55 at the time of her husband's death; or
  - (b) is over the age of 40 but under the age of 55 at the time when she ceases to be entitled to a widowed mother's allowance,
 subsection (4) above shall have effect as if for "55" there were substituted " 50 ".

#### Textual Amendments

**F2** Words in s. 39(3) substituted (*retrospectively*) by virtue of 2000 c. 4 (N.I.), s. 35(1)(a)(2)(a)

### 39 Rate of widowed mother's allowance and widow's pension. **N.I.**

- (1) The weekly rate of—
  - (a) a widowed mother's allowance,
  - (b) a widow's pension,
 shall be determined in accordance with the provisions of sections 44 and 45 below as they apply in the case of a Category A retirement pension, but subject, in particular, to the following provisions of this section and section 46(2) below.
- (2) In the application of sections 44 and 45 below by virtue of subsection (1) above—
  - (a) where the woman's husband was over pensionable age when he died, references in those sections to the pensioner shall be taken as references to the husband, and
  - (b) where the husband was under pensionable age when he died, references in those sections to the pensioner and the tax year in which he attained pensionable age shall be taken as references to the husband and the tax year in which he died.
- (3) In the case of a woman whose husband dies after 5th April 2000, the additional pension falling to be calculated under sections 44 and 45 below by virtue of subsection (1) above shall (before making any reduction required by subsection (4) below) be one half of the amount which it would be apart from this subsection.

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- (4) Where a widow's pension is payable to a woman who was under the age of 55 at the time when the applicable qualifying condition was fulfilled, the weekly rate of the pension shall be reduced by 7 per cent. of what it would be apart from this subsection multiplied by the number of years by which her age at that time was less than 55 (any fraction of a year being counted as a year).
- (5) For the purposes of subsection (4) above, the time when the applicable qualifying condition was fulfilled is the time when the woman's late husband died or, as the case may be, the time when she ceased to be entitled to a widowed mother's allowance.
- (6) In the case of a widow whose late husband died before 11th April 1988 and who either—
  - (a) was over the age of 40 but under the age of 55 at the time of her husband's death; or
  - (b) is over the age of 40 but under the age of 55 at the time when she ceases to be entitled to a widowed mother's allowance,subsection (4) above shall have effect as if for "55" there were substituted " 50 ".

### **39A Widowed parent's allowance.**

- (1) This section applies where—
  - (a) a person whose spouse dies on or after the appointed day is under pensionable age at the time of the spouse's death, or
  - (b) a man whose wife died before the appointed day—
    - (i) has not remarried before that day, and
    - (ii) is under pensionable age on that day.
- (2) The surviving spouse shall be entitled to a widowed parent's allowance at the rate determined in accordance with section 39C below if the deceased spouse satisfied the contribution conditions for a widowed parent's allowance specified in Schedule 3, Part I, paragraph 5 and—
  - (a) the surviving spouse is entitled to child benefit in respect of a child falling within subsection (3) below; or
  - (b) the surviving spouse is a woman who either—
    - (i) is pregnant by her late husband, or
    - (ii) if she and he were residing together immediately before the time of his death, is pregnant in circumstances falling within section 37(1)(c) above.
- (3) A child falls within this subsection if one of the conditions specified in section 81(2) below is for the time being satisfied with respect to the child and the child is either—
  - (a) a son or daughter of the surviving spouse and the deceased spouse; or
  - (b) a child in respect of whom the deceased spouse was immediately before his or her death entitled to child benefit; or
  - (c) if the surviving spouse and the deceased spouse were residing together immediately before his or her death, a child in respect of whom the surviving spouse was then entitled to child benefit.
- (4) The surviving spouse shall not be entitled to the allowance for any period after she or he remarries, but, subject to that, the surviving spouse shall continue to be entitled to it for any period throughout which she or he—

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- (a) satisfies the requirements of subsection (2)(a) or (b) above; and
  - (b) is under pensionable age.
- (5) A widowed parent's allowance shall not be payable—
- (a) for any period falling before the day on which the surviving spouse's entitlement is to be regarded as commencing by virtue of section 5(1)(l) of the Administration Act; or
  - (b) for any period during which the surviving spouse and a person of the opposite sex to whom she or he is not married are living together as husband and wife.

VALID FROM 24/04/2000

#### **[<sup>F4</sup>39B Bereavement allowance where no dependent children.**

- (1) This section applies where a person whose spouse dies on or after the appointed day is over the age of 45 but under pensionable age at the spouse's death.
- (2) The surviving spouse shall be entitled to a bereavement allowance at the rate determined in accordance with section 39C below if the deceased spouse satisfied the contribution conditions for a bereavement allowance specified in Schedule 3, Part I, paragraph 5.
- (3) A bereavement allowance shall be payable for not more than 52 weeks beginning with the date of the spouse's death or (if later) the day on which the surviving spouse's entitlement is to be regarded as commencing by virtue of section 5(1)(l) of the Administration Act.
- (4) The surviving spouse shall not be entitled to the allowance for any period after she or he remarries, but, subject to that, the surviving spouse shall continue to be entitled to it until—
  - (a) she or he attains pensionable age, or
  - (b) the period of 52 weeks mentioned in subsection (3) above expires, whichever happens first.
- (5) The allowance shall not be payable—
  - (a) for any period for which the surviving spouse is entitled to a widowed parent's allowance; or
  - (b) for any period during which the surviving spouse and a person of the opposite sex to whom she or he is not married are living together as husband and wife.]

#### **Textual Amendments**

- F4** Ss. 39A-39C inserted (24.4.2000 for specified purposes and 9.4.2001 otherwise) by [S.I. 1999/3147](#) (N.I. 11), [art. 52\(2\)](#); [S.R. 2000/133](#), [art. 2\(3\)\(a\)](#), [Sch. Pt. I](#)

#### **39C Rate of widowed parent's allowance and bereavement allowance. N.I.**

- (1) The weekly rate of a widowed parent's allowance shall be determined in accordance with the provisions of sections 44 to 45A below as they apply in the case of a Category

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A retirement pension, but subject, in particular, to the following provisions of this section and section 46(2) below.

- (2) The weekly rate of a bereavement allowance shall be determined in accordance with the provisions of section 44 below as they apply in the case of a Category A retirement pension so far as consisting only of the basic pension referred to in subsection (3)(a) of that section, but subject, in particular, to the following provisions of this section.
- (3) In the application of sections 44 to 45A or (as the case may be) section 44 below by virtue of subsection (1) or (2) above—
  - (a) where the deceased spouse was over pensionable age at his or her death, references in those sections to the pensioner shall be taken as references to the deceased spouse, and
  - (b) where the deceased spouse was under pensionable age at his or her death, references in those sections to the pensioner and the tax year in which he attained pensionable age shall be taken as references to the deceased spouse and the tax year in which he or she died.
- (4) Where a widowed parent's allowance is payable to a person whose spouse dies after 5th April 2000, the additional pension falling to be calculated under sections 44 to 45A below by virtue of subsection (1) above shall be one half of the amount which it would be apart from this subsection.
- (5) Where a bereavement allowance is payable to a person who was under the age of 55 at the time of the spouse's death, the weekly rate of the allowance shall be reduced by 7 per cent. of what it would be apart from this subsection multiplied by the number of years by which that person's age at that time was less than 55 (any fraction of a year being counted as a year).

**[<sup>F6</sup>39C Rate of widowed parent's allowance and bereavement allowance. N.I.]**

- (1) The weekly rate of a widowed parent's allowance shall be determined in accordance with the provisions of sections 44 to 45A below as they apply in the case of a Category A retirement pension, but subject, in particular, to the following provisions of this section and section 46(2) below.
- (2) The weekly rate of a bereavement allowance shall be determined in accordance with the provisions of section 44 below as they apply in the case of a Category A retirement pension so far as consisting only of the basic pension referred to in subsection (3)(a) of that section, but subject, in particular, to the following provisions of this section.
- (3) In the application of sections 44 to 45A or (as the case may be) section 44 below by virtue of subsection (1) or (2) above—
  - (a) where the deceased spouse was over pensionable age at his or her death, references in those sections to the pensioner shall be taken as references to the deceased spouse, and
  - (b) where the deceased spouse was under pensionable age at his or her death, references in those sections to the pensioner and the tax year in which he attained pensionable age shall be taken as references to the deceased spouse and the tax year in which he or she died.
- (4) Where a widowed parent's allowance is payable to a person whose spouse dies after [<sup>F7</sup>5th October 2002], the additional pension falling to be calculated under sections 44



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to 45A below by virtue of subsection (1) above shall be one half of the amount which it would be apart from this subsection.

- (5) Where a bereavement allowance is payable to a person who was under the age of 55 at the time of the spouse's death, the weekly rate of the allowance shall be reduced by 7 per cent. of what it would be apart from this subsection multiplied by the number of years by which that person's age at that time was less than 55 (any fraction of a year being counted as a year).]

#### Textual Amendments

- F6** Ss. 39A-39C inserted (24.4.2000 for specified purposes and 9.4.2001 otherwise) by S.I. 1999/3147 (N.I. 11), art. 52(2); S.R. 2000/133, art. 2(3)(a), Sch. Pt. I
- F7** Words in s. 39C(4) substituted (*retrospectively*) by virtue of 2000 c. 4 (N.I.), s. 35(1)(a)(2)(a)

#### 40 Invalidity pension for widows.

- (1) Subject to subsection (2) below, this section applies to a woman who—
- (a) on her late husband's death is not entitled to a widowed mother's allowance or subsequently ceases to be entitled to such an allowance; and
  - (b) is incapable of work at the time when he dies or when she subsequently ceases to be so entitled; and
  - (c) either—
    - (i) would have been entitled to a widow's pension if she had been over the age of 45 when her husband died or when she ceased to be entitled to a widowed mother's allowance; or
    - (ii) is entitled to such a pension with a reduction under section 39(4) above.
- (2) This section does not apply to a woman unless—
- (a) her husband died after 5th April 1979; or
  - (b) she ceased to be entitled to a widowed mother's allowance after that date (whenever her husband died).
- (3) Subject to subsection (7) below, a woman to whom this section applies shall be entitled to an invalidity pension under this section for any day of incapacity for work which—
- (a) falls in a period of interruption of employment that began before the time when her late husband died or she subsequently ceased to be entitled to a widowed mother's allowance; and
  - (b) is after that time and after the first 168 days of incapacity for work in that period.
- (4) An invalidity pension under this section shall be payable at the higher of—
- (a) the weekly rate which would apply if the pension were payable under section 33 above; or
  - (b) the weekly rate specified in subsection (5) below.
- (5) The weekly rate referred to in subsection (4)(b) above is—
- (a) if the woman is not entitled to a widow's pension, a weekly rate equal to that of the widow's pension to which she would have been entitled if she had been over the age of 55 when her husband died; and



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- (b) if she is entitled to a widow's pension with a reduction under section 39(4) above, a weekly rate equal to the difference between the weekly rate of that pension and what it would have been without the reduction,
- but, in calculating the weekly rate of a widow's pension for the purposes of paragraph (a) above, or the weekly rate of a widow's pension without reduction, for the purposes of paragraph (b) above, any additional pension by virtue of section 44(3) below as it applies for the purposes of section 39 above shall be determined without reference to any surpluses in her late husband's earnings factors for tax years after 1990-91.
- (6) For the purpose of calculating the rate of an invalidity pension for a woman to whom this section applies by virtue of subsection (1)(c)(ii) above, subsections (4) and (5) above shall have effect with such modifications as are prescribed.
- (7) A woman shall not be entitled to an invalidity pension under this section if she is over pensionable age and is entitled to a Category A or Category B retirement pension; but if she has attained pensionable age, and the period of interruption of employment mentioned in subsection (3)(a) above did not terminate earlier than the day before she attained that age—
- (a) she shall, if not otherwise entitled to a Category A retirement pension, be entitled to such a pension; and
- (b) the weekly rate of the Category A retirement pension to which she is entitled (whether by virtue of paragraph (a) above or otherwise) shall be determined in the prescribed manner.
- (8) No invalidity pension shall be payable under section 33 above for any day of incapacity for which an invalidity pension is payable under this section.
- (9) In subsection (6) above "modifications" includes additions, omissions and amendments.

#### **41 Invalidity pension for widowers.**

- (1) This section applies to a man whose wife has died on or after 6th April 1979 and who either—
- (a) was incapable of work at the time when she died; or
- (b) becomes incapable of work within the prescribed period after that time.
- (2) Subject to subsection (7) below, a man to whom this section applies shall be entitled to an invalidity pension under this section for any day of incapacity for work which—
- (a) falls in a period of interruption of employment that began before the time when his wife died or within the prescribed period after that time; and
- (b) is after that time and after the first 168 days of incapacity for work in that period.
- (3) An invalidity pension under this section shall be payable at the higher of—
- (a) the weekly rate which would apply if the pension were payable under section 33 above; or
- (b) the weekly rate specified in subsection (4) below.
- (4) The weekly rate mentioned in subsection (3)(b) above is a rate determined in accordance with the provisions of sections 44 and 45 below as they apply in the case

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of a Category A retirement pension, but subject, in particular, to subsections (5) and (6) and section 46(2) below.

- (5) In the application of sections 44 and 45 below by virtue of subsection (4) above—
- (a) where the man's wife was over pensionable age when she died, references in those sections to the pensioner shall be taken as references to the wife; and
  - (b) where the man's wife was under pensionable age when she died, references in those sections to the pensioner and the tax year in which he attained pensionable age shall be taken as references to the wife and the tax year in which she died; and
  - (c) any additional pension shall be determined without reference to any surpluses in her earnings factors for tax years after 1990-91.
- (6) In the case of a widower whose wife dies after 5th April 2000, the additional pension falling to be calculated under sections 44 and 45 below by virtue of subsection (4) above shall be one half of the amount which it would be apart from this subsection.
- (7) A man shall not be entitled to an invalidity pension under this section if he is over pensionable age and is entitled to a Category A or Category B retirement pension; but if he has attained pensionable age, and the period of interruption of employment mentioned in subsection (2)(a) above did not terminate earlier than the day before he attained that age—
- (a) he shall, if not otherwise entitled to a Category A retirement pension and also not entitled to a Category B retirement pension by virtue of section 51 below, be entitled to a Category A retirement pension; and
  - (b) the weekly rate of the Category A retirement pension to which he is entitled (whether by virtue of paragraph (a) above or otherwise) shall be determined in the prescribed manner.
- (8) No invalidity pension shall be payable under section 33 above for any day of incapacity for which an invalidity pension is payable under this section.

#### **42 Entitlement to invalidity pension on termination of employment after period of entitlement to disability working allowance.**

- (1) Where—
- (a) a person who is engaged and normally engaged in remunerative work ceases to be so engaged; and
  - (b) he is entitled to a disability working allowance for the week in which there falls the last day on which he is so engaged; and
  - (c) he qualified for a disability working allowance for that week by virtue of an invalidity pension under section 40 or 41 above having been payable to him; and
  - (d) the first relevant day after he ceases to be engaged as mentioned in paragraph (a) above is a day on which he is incapable of work and falls not later than the end of the period of 2 years beginning with the last day for which he was entitled to such a pension,

any day since that day which fell within a week for which he was entitled to a disability working allowance shall be treated for the purposes of any claim for such a pension for a period commencing after he ceases to be engaged as mentioned in paragraph (a) above as having been a day on which he was incapable of work.

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- (2) Any day other than a Sunday or a day prescribed under section 57(1)(e) below is a relevant day for the purposes of this section.

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