

EDUCATION ALLOWANCE

(Article 67 of the Staff Regulations and Article 3 of Annex VII)

INFORMATION SHEET

1. WHO IS ENTITLED?

Education allowance A (pre-school)

The pre-school allowance is granted for each dependent child who is **under 5 years of age** or is not yet in regular full-time attendance at a primary school (entitlement ceases at the latest at the end of the month in which the child reaches the age of 8).

Education allowance B:

a) The variable rate education allowance (code ISN on your pension statement): is granted for each dependent child who is at least 5 years old and in regular full-time attendance at a **primary or secondary school that charges fees** (registration fees).

b) The flat-rate education allowance (code ISF on your pension statement): is granted to children attending a **higher level establishment or university**.

Entitlement to education allowance B ceases at the end of the month in which the conditions giving such entitlement are no longer met, but no later than the end of the month in which the child reaches the age of 26, unless the education allowance has been suspended for compulsory military service. In that specific case, it will be extended by a period equal to that of the military service.

2. HOW IS THE ALLOWANCE CALCULATED?

Allowance A (flat rate): €102,18 per month.

Allowance B (variable rate):

For each child attending a primary or secondary educational establishment you may receive reimbursement of registration fees and transport costs incurred, up to a monthly limit of €283,82. The monthly limit is doubled if you live more than 50 km from a European School.

Monthly reimbursement is one-twelfth of the total annual expenses referred to above.

All expenses must be substantiated by a receipted invoice or proof of payment showing the child's surname and first name, the school year or period concerned and the nature of the expenses incurred.

You must nevertheless specify the means of transport used (European School bus, private transport, public transport or school transport).

- If *public* or *school* transport is used, a copy of the annual season ticket (for public transport) or proof of payment from the school transport administration must be submitted.
- If *private* transport is used, the reimbursement will be based on the cost of a public transport season ticket.
- The administration will pay the transport costs to the schools or parents' association for the use of the *European School buses*, provided that you are entitled to the education allowance.

Allowance B (flat rate):

For each child attending an establishment of higher education you may receive a flat-rate allowance equal to the standard limit for the education allowance, i.e. €283,82 per month.

If the child attends an establishment of higher education which is located at least 50 km from your place of residence you may receive double the limit for the education allowance – i.e. €567,64 per month.

Please note that:

- Attendance at a short-term educational or training course is not considered to be regular full-time attendance at an educational establishment (at least 16 hours a week for a minimum of 3 consecutive months).
- Where the course is based on distance learning, the applications will be examined in depth by our services.
- Allowance B (flat-rate) can be granted for children who are in paid accommodation away from the family home (boarding school or host family) other than children who are living with relatives and/or in premises owned by the pensioner. Supporting documents must be provided by way of evidence of the costs incurred.

3. PAYMENT OF EDUCATION ALLOWANCE TO A THIRD PERSON
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Where the child generating entitlement to the education allowance is in the custody of another person by virtue of legal measures or a decision by a court or competent administrative authority, the allowances may be paid to that person in your name and on your behalf.

You are required to give the name and address of the person who has custody of the child and to state the amounts of family allowances paid to that person from other sources (Article 2 GIP, Commission Decision 52-2004).

Provided that he or she exercises the entitlement to direct payment of family allowances, the person with custody of the child has the same obligation to report to the administration all useful information concerning the child's situation which might result in a change in his or her financial entitlements.

It should be noted that the distance of at least 50 km required to double the standard maximum amount is calculated from the place of residence of the person having custody of the child. This applies to children attending an establishment of higher education and can also apply to children attending a distant primary or secondary school for *imperative educational reasons*.

4. GRANTS AND SIMILAR ALLOWANCES RECEIVED FROM ANY OTHER SOURCE

Anyone applying for the education allowance must declare any grants or similar allowances from any other source (such as *allocations d'études*, *basisbeurs*, *student grants*, *state education grants*, *allocation de rentrée scolaire*, *becas de estudios* and the like). Pursuant to Article 67(2) of the Staff Regulations, these allowances are deducted from the allowances paid by the institution.

You must of your own initiative claim family allowances to which you are entitled from bodies other than the EU institutions.

NB

If you live in the **Grand-Duchy of Luxembourg or in Denmark** and your children are over 18 and attending a higher-education establishment, this information applies to you.

National allowances/benefits have priority over those paid by the European institutions. You must therefore submit a grant application to CEDIES (Luxembourg) or SU (Denmark).

*National grants are regarded as **equivalent to the education allowance granted under the Staff Regulations**. Such grants will therefore be deducted from the education allowance paid to former officials or other servants for the students concerned up to the value of the flat-rate education allowance.*

The flat-rate education allowance will not be paid without a supporting document stating whether or not a grant has been awarded.

5. OBTAINING A TAX REDUCTION

A tax reduction, equivalent to that for a dependent child, may be granted on request and subject to the following conditions:

- If your child is under 26 years of age, has finished his/her studies, has no income and is registered with a national unemployment body, you may be granted a tax reduction for a maximum of 9 months. You must submit a certificate confirming the child's status as unemployed and a document indicating that he/she is not entitled to unemployment benefit.
- If your child is over 26 years of age and is continuing or supplementing a programme of studies commenced before that age, you may be granted a tax reduction **until not later than the end of the month in which the child reaches the age of 30 years on presentation of the higher-education attendance certificate.**

6. SUBMITTING YOUR APPLICATION

a) Procedure

Applications for an education allowance must be submitted once only and will no longer have to be renewed in subsequent years provided the following conditions are met:

- your child is under 18 years of age and is continuing his/her studies without an apprenticeship contract or vocational training;
- he/she lives with the family;
- you are not applying for a variable allowance.

In all other cases, an application will have to be made each year.

All supporting documentation **must** be submitted with the applications, e.g.:

- original attendance certificates (signed by the headmaster or headmistress and with the school stamp). Certificates must state precisely the dates on which the academic year starts and ends and the number of hours of study per week;
- certificate from the national family allowance fund stating the amount received by the child or setting out the decision refusing payment of such allowances;
- receipted invoices, photocopies of season tickets or other proof of payment, as specified in point 2.

In all cases, your attention is drawn to your duty to inform the relevant department of any change likely to affect your entitlement to the family allowances, in particular if your child ends his/her studies.

Based on the relevant provisions in Annex VII to the Staff Regulations, discontinuance of the education allowance may entail, in the case of an adult child, discontinuance of other family allowances and benefits, in particular: the dependent child allowance, the tax reduction, the household allowance, cover under the joint sickness insurance scheme and the orphan's pension.

If an entitlement has to be discontinued retroactively because of a delay in notifying the Commission, the amounts wrongly paid may be recovered from you.

b) Deadlines

Since you are in receipt of a pension, send your application to the Pensions unit postmarked **no later than 31 October 2012**. If you do not reply by that date, the appropriate department will examine and, if necessary, discontinue the family allowances with retroactive effect from the end of the previous school year, thus resulting in the recovery of undue payments in accordance with Article 85 of the Staff Regulations.

For those receiving an orphan's pension, the allowances will be suspended from **1 August** each academic year for children over the age of 18. Payment of the allowances will recommence following receipt of the supporting documents, in order of receipt. Where there are several children in the same family, please group the documents together and then send them by post. If a child discontinues his or her education, please inform us when sending the supporting documents for the other children.

c) Send the documents to:

EUROPEAN COMMISSION

Office for the Administration and Settlement of individual entitlements

PMO 4 – Pensions sector

MERO - B-1049 Brussels

<h2>7. OTHER INFORMATION</h2>

- Always quote your pension number in any correspondence with Commission departments.
- Send the request with all the supporting documents within the deadlines.
- If it is difficult to obtain your children's enrolment certificates, ask for them in advance. Do not wait until the forms have been sent out.
- Avoid sending documents in separately. It is better to collect all your supporting documents and send them in together. Always provide information as promptly as possible to avoid the unpleasantness of having to pay back allowances you were not entitled to.
- Receipted invoices or other proof of payment must be provided to obtain the variable portion of the allowance. There are no exceptions to this rule.
- Inform the Pensions unit immediately and in writing of any change that might affect your entitlement to family allowances if, for example, your child has interrupted or completed his or her studies, changed university, is receiving a student grant for the current year, is on a placement, or has to do his military service.