

EDUCATION ALLOWANCE

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

2003 - 2004

This information does not apply to staff working in delegations in non-member countries, who are covered by Annex X to the Staff Regulations.

They should refer to the DG.RELEX.K.02 leaflet : *“How to do it: Education allowance and requests for reimbursement”*

TABLE OF CONTENTS

1. WHO IS ELIGIBLE	3
2. HOW THE ALLOWANCE IS CALCULATED.....	4
2.1. THE FLAT-RATE PORTION OF THE ALLOWANCE	4
2.1.1. <i>Primary and secondary education (or equivalent)</i>	4
2.1.2. <i>Higher education</i>	4
2.2. THE VARIABLE PORTION OF THE ALLOWANCE	5
BREAKDOWN BETWEEN THE FLAT RATE AND VARIABLE PORTIONS OF THE ALLOWANCE	6
2.3. TRANSPORT COSTS	7
2.4. REIMBURSEMENT OF COURSES AT WINTER SPORTS, COUNTRYSIDE, COASTAL RESORTS AND SIMILAR ACTIVITIES	7
3. DOUBLE EDUCATION ALLOWANCE FOR IMPERATIVE EDUCATIONAL REASONS	8
4. PAYMENT OF EDUCATION ALLOWANCE TO A THIRD PERSON	9
5. GRANTS AND SIMILAR ALLOWANCES RECEIVED FROM ANY OTHER SOURCE	9
6. SUBMISSION OF APPLICATIONS	9
6.1. CONSEQUENCES OF FAILING TO RENEW APPLICATIONS :	10
6.2. ADDRESSES FOR APPLICATIONS AND ENQUIRIES	10
7. YOU CAN TRANSFER PART OF YOUR SALARY FOR PAYMENT OF SCHOOL FEES	11
8. A FEW SUGGESTIONS	11

EDUCATION ALLOWANCE

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

1. WHO IS ELIGIBLE

The education allowance is granted annually, upon submission of an application, to officials and temporary staff and to persons in receipt of a pension or an allowance under Regulations 2150/82, 1679/85, 3518/85, 2274/87 or 1857/89 or under Article 50 of the Staff Regulations for dependent children¹ who are in regular full-time attendance at an educational establishment, i.e. who attend a minimum of sixteen hours of lessons per week for a minimum of three consecutive months. Temporary attendance at an educational or training course is not considered to be regular full-time attendance at an educational establishment.

Education allowance is not paid nor are expenses reimbursed in the case of children attending nursery school.

Auxiliary staff, national experts, service providers and agency staff are not eligible for the education allowance.

Participation in a correspondence course does not give entitlement to the education allowance, except in the case of a child who is unable to attend an educational establishment for reasons of force majeure (sickness, handicap, etc) duly supported by evidence. If this is the case, you should contact the Help Desk for more details.

Entitlement to the education allowance commences when the child begins to attend a primary educational establishment. It ceases at the end of the month in which the conditions giving such entitlement are no longer fulfilled, and at the latest at the end of the month in which the child reaches the age of 26.

¹ The education allowance is not granted for persons who are treated as dependent children for family allowance purposes under Article 2(4) of Annex VII to the Staff Regulations

2. HOW THE ALLOWANCE IS CALCULATED

The education allowance is intended to cover the actual education costs incurred by parents but may not exceed the *maximum monthly amount* laid down in Article 3(1) of Annex VII to the Staff Regulations (EUR 212,14 from 1 July 2002)².

The allowance is paid monthly and consists of a **FLAT-RATE portion** and, in some cases, a **VARIABLE portion** up to the maximum monthly amount referred to above.

2.1. The flat-rate portion of the allowance

The *flat-rate portion* of the allowance is to cover **compulsory expenditure** on full participation by the child in the curriculum of the establishment attended (administrative costs, books, school and sports equipment, extra-curricular activities, school trips, excursions, school insurance, etc.).

This portion is calculated as follows:

2.1.1. Primary and secondary education (or equivalent)

- **36%** of the *maximum monthly amount* for each child under the age of 11 (EUR 76,37);
- **50%** of the *maximum monthly amount* for each child over the age of 11 (EUR 106,07);
- **100%** of the *maximum monthly amount* for each child who attends a primary or secondary school located in a place other than that where the family lives and who therefore does not live at home (EUR 212,14);

2.1.2. Higher education³

- **100%** of the *maximum monthly amount* referred to above for each child who attends a higher education establishment (EUR 212,14);
- or
- **200%** of the *maximum monthly amount* referred to above (EUR 424,28) if the following three conditions are fulfilled⁴:

² This monthly maximum changes whenever staff remuneration is adjusted.

³ Any complete university or equivalent course for which a certificate obtained on completion of secondary education is required and which leads to a legally recognized higher-education diploma may be counted as higher education.

- 1) the place of employment of the official or member of the temporary staff must be at least 50 km from a higher education establishment located in the country of which he or she is a national and working in his or her native language;
- 2) the child must actually attend an establishment of higher education at least 50 km from the place of employment of the official or member of the temporary staff;
- 3) the official or member of the temporary staff must be entitled to the expatriation allowance.

Only the first two conditions need be fulfilled **if there is no higher education establishment** in the country of which the official or member of the temporary staff is a national.

2.2. The variable portion of the allowance

The *variable portion* of the allowance, which is paid in addition to the *flat-rate portion* up to the maximum monthly amount, is intended to cover the following in particular:

- a) registration fees;
- b) examination fees;
- c) the cost of transport (private, public or school) between the child's home and school if the journey (one-way) between the two is at least 1 km (see point 2.3);
- d) costs arising from participation in courses at *winter sports, countryside, coastal resorts* or *similar activities* (see point 2.4);
- e) actual costs referred to in point 2.1 which exceed those reimbursed as the *flat-rate portion*.

The *variable portion* is equal to one twelfth of the total annual expenses referred to above **but may not exceed:**

- **64%** of the *maximum monthly amount* for a child under 11 years of age (EUR 135,77);
- **50%** of the *maximum monthly amount* for a child over 11 years of age (EUR 106,07).

The expenses referred to above are reimbursed only if supporting documents are submitted; a receipted invoice, or proof of payment, showing the name and first name of the child and the school year or period to which it refers and the nature of the expenses incurred.

No variable portion is paid in respect of:

- children attending an establishment of higher education;
- children attending a primary or secondary school who do not live in the place where their family is resident and receive a flat-rate allowance equal to 100 % of the maximum amount.

4 This second indent regarding the double maximum amount does not apply in the case of staff in receipt of a pension.

BREAKDOWN BETWEEN THE FLAT RATE AND VARIABLE PORTIONS OF THE ALLOWANCE

Standard maximum amount:

Child under the age of 11

Flat-rate portion 36%	Variable portion available 64%
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(as % of statutory maximum)

Child age 11 or over

Flat-rate portion 50%	Variable portion available 50%
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Child attending a primary or secondary school but not living in the family home, or attending a university or establishment of higher education

Flat-rate portion 100%

Double the maximum amount

Child **under** the age of 11 who, for imperative educational reasons duly supported by evidence, is attending a primary or secondary school located at least 50 km from the place of employment of the official or member of the temporary staff, or where there is no European School located within 50 km of the place of employment.

Flat-rate portion 36%	Variable portion available 164%
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(as % of statutory maximum)

Child age 11 or **over**, who, for imperative educational reasons duly supported by evidence, is attending a primary or secondary school located at least 50 km from the place of employment of the official or member of the temporary staff, or where there is no European School located within 50 km of the place of employment.

Flat-rate portion 50%	Variable portion available 150%
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Child enrolled in a university or establishment of higher education located more than 50 km from the place of employment of the parent in receipt of the allowance provided he/she is also entitled to expatriation allowance.

Flat-rate portion 200%

2.3. Transport costs

The cost of public, private or school transport is reimbursed, up to the *maximum amount* cited in point 2., on condition that the length of the journey (one-way) between the child's home and school is at least 1 km.

- 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 distance between the child's home and school (one-way) must be stated. Reimbursement will be based on the cost of the cheapest form of normal public or school transport taking the shortest route between home and school.

Officials, members of the temporary staff and retired staff in receipt of a pension who for administrative purposes come under PMO.1-Brussels and whose children attend European Schools in Brussels or Varese and those who for administrative purposes come under PMO.5-Luxembourg and whose children attend the European School in Luxembourg need not pay for the use of school buses (or buses of the *Association des transports privés* in Luxembourg) if they are entitled to the education allowance. The administration will pay these transport costs direct to the school (or the Association) so long as they do not exceed the *maximum laid down*.

Annual applications must nevertheless specify which means of transport is used (European School bus, private transport, public transport or school transport).

2.4. Reimbursement of courses at winter sports, countryside, coastal resorts and similar activities

The costs incurred in respect of school excursions, school trips, sports courses and language courses do not qualify for reimbursement under this head as they are covered by the flat-rate portion of the allowance (see point 2.1).

Costs arising from a child's participation in courses at **winter sports, countryside, coastal resorts and similar activities** are reimbursed, within the limits laid down for the variable portion of the allowance in point 2.2, on condition that:

- a) the courses are organized by the educational establishment and not by individual teachers;
- b) the courses are organized as part of the curriculum and not in holiday periods;
- c) the child is lodged in accommodation away from home during these courses;
- d) half the time on these courses is devoted to normal school work.

Reimbursement will be effected only on presentation of the original of a certificate signed by the headmaster/headmistress and bearing the school stamp, **issued after the return of the participants.**

The certificate must state:

- a) that the student concerned "**has participated**" in a course at a **winter sports, countryside, coastal resort or course at ... (similar activity)**;
- b) that the activity was organized by the educational establishment as part of the curriculum;
- c) the dates of attendance (not in holiday periods);
- d) the place where the course took place;
- e) the student was lodged in accommodation away from home during the course;
- f) the price paid by the applicant.

The applicant must also state whether a contribution or reimbursement has been or could be paid by any other organization for the course in question.

Reimbursement will be paid in 12 monthly instalments, normally commencing at the beginning of the school year and continuing up to the following August, as part of the variable portion of the allowance (code 206 or ISN on salary statements).

3. DOUBLE EDUCATION ALLOWANCE FOR IMPERATIVE EDUCATIONAL REASONS

When the place of employment of the official or member of the temporary staff, is located at least 50 km from either a European School or a primary or secondary educational establishment working in his or her language, which the child attends for **imperative educational reasons duly supported by evidence**, the variable portion of the allowance is paid up to a maximum of:

- **164%** of the maximum amount for a child under 11 years of age (EUR 347,91);
- **150%** of the maximum amount for a child over 11 years of age (EUR 318,21).

The following are recognized as imperative educational reasons:

- ◆ **Educational problems affecting a child attending a European School or a school of the child's nationality working in the child's language.**

In this case a certificate is required from the headmaster or headmistress of the school the child is attending, stating that it is in the child's interests to leave that school and take up another form of education.

This new form of education must correspond exactly to the child's educational requirements as observed during the time spent at his or her current school.

- ◆ **Educational problems arising because a parent who is an official or member of the temporary staff has taken up employment in a place where there is a European School or has been transferred there.**

In this case the imperative educational reasons which are considered to justify keeping the child at the school he or she currently attends are:

- that the child is in the final year of a course leading to a higher level of education;

or

- that the child is in the last (e.g. third) term of a school year; in this case a certificate is required from the headmaster or headmistress stating that a change of school under these circumstances would seriously affect the child's education.
- ◆ **Language problems where there is a European School at the place of employment of the parent who is an official or member of the temporary staff.**

In this case, a certificate is required from the headmaster or headmistress of the European School stating that the child's knowledge of languages is not sufficient to enable him or her to attend classes at the European School.

To qualify for the double education allowance for imperative educational reasons, the school the child attends must be more than 50 km from the parent's place of employment.

4. PAYMENT OF EDUCATION ALLOWANCE TO A THIRD PERSON

If custody of the child in respect of whom the education allowance is paid has been entrusted by law, by order of court or by order of the competent administrative authority to another person, the allowance is paid to that person on behalf of the official, member of the temporary staff, pensioner or other person entitled to the allowance referred to in the Regulations cited in point 1.

In this case, the distance between home and the establishment of higher education (see point 2.1) or the primary or secondary school attended for *imperative educational reasons*, which must be at least 50 km for the doubling of the statutory maximum amount, is calculated from the place of residence of the person having custody of the child.

5. 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* and the like).

Pursuant to Article 67(2) of the Staff Regulations, these allowances are deducted from the allowances paid by the institution.

6. SUBMISSION OF APPLICATIONS

You must **reapply** for the education allowance **each year**, using a special form published on the Intranet.

Applicants should fill out **one form only**, making photocopies of parts of the form as needed if several children are involved.

The deadline for sending the form and supporting documentation to the administrative department concerned is **15 November**. If you do not reapply by that date, payment of your education allowance will be suspended without prior notice.

Annex 1 of the form must be completed for each child for whom an application is being made.

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

- **originals of certificates of attendance** (signed by the headmaster or headmistress and with the school stamp) (for pupils of the European Schools only, no certificate of attendance is required);
- **receipted invoices, photocopies of season tickets or other proof of payment**, as specified in point 2.2.

6.1. Consequences of failing to renew applications :

If the person entitled to an allowance does not reapply, it will be terminated with effect from the end of the previous school year and the payments already made for the current school year will be recovered in accordance with Article 85.

On the basis of the provisions of Annex VII to the Staff Regulations, termination of the education allowance in cases where the child is over 18 may entail the termination of other family allowances and benefits, in particular the dependent child allowance, the household allowance, tax abatements, sickness insurance cover and annual travel expenses, and may also lead to a reduction in the expatriation allowance.

6.2. Addresses for applications and enquiries

- For staff employed in Brussels or in external offices administered from Brussels:

**PMO.1 –Administration of individual financial entitlements
Education allowances
B-28 3/52 Brussels
Help Desk tel. : 52175/93729 fax : 69884
E-mail : ADMIN-BXL ALLOC SCOLAIRES**

- *For staff employed in Luxembourg:*

**PMO.5 – PMO - LUXEMBOURG
Sector of Individual Rights
JMO A1/108 tel. 34787**

- *For Joint Research Centre staff.*

Relevant administrative office at each establishment

- *For retired staff and persons in receipt of an allowance under Regulations 2150/82, 1679/85, 3518/85, 2274/87 or 1857/89 or under Article 50 of the Staff Regulations:*

EUROPEAN COMMISSION
PMO.4 - Pensions
Bâtiment B-28 5/98, BRUSSELS

or to the person in charge of the pensioner's file.

7. YOU CAN TRANSFER PART OF YOUR SALARY FOR PAYMENT OF SCHOOL FEES

If you wish to avail yourself of Article 17(2) of Annex VII to the Staff Regulations and Article 2 of the Regulation implementing the Staff Regulations to have part of your salary transferred outside your country of employment to pay the education expenses of your child/children, you should send a **copy of the certificates of attendance together with the transfer request** to:

PMO.2 – BRUSSELS – Remuneration

Mr Jose Sanchez Perez, SC11 3/12, tel. 54890, fax 93566

PMO.5 – LUXEMBOURG – Salary Sector

JMO A1/111 tel. 35167

You should send your application and the certificates of attendance **before 11 October** (absolute deadline) to ensure that the transfer takes effect from November.

8. A FEW SUGGESTIONS

- Always quote your personnel number in any correspondence with the administration.
- **Send in your application with all supporting documentation before 15 November.** Late or incomplete applications may cause lengthy administrative delays, which also affect those who met the deadline.
- **Avoid sending documents in separately.** It is better to collect all your supporting documents and send them in together.
- Receipted invoices or other proof of payment must be presented (as is the case for the reimbursement of medical expenses) to obtain the **variable portion of the allowance.** **There are no exceptions to this rule.** So please avoid fruitless discussions.
- Inform the relevant administrative unit immediately and in writing of any change that might affect your entitlement to family allowances. For example, if 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 has to do his military service.
- Always provide information as promptly as possible to avoid the unpleasantness of having to pay back allowances you were not entitled to.