



PENSIONS AND INVALIDITY ALLOWANCES

GUIDE

2015

The aim of this Guide is to help you find your way through the various provisions of the Staff Regulations and the other rules and regulations applying to your pension, and to provide other useful information about whom to contact for further details or in the event of a dispute.

Any suggestions for improvements to this Guide can be sent to the Pensions Unit (PMO/4).

Fax: +32.2.2965373 or PMO Contact: <https://ec.europa.eu/pmo/contact/>

**In the event of a dispute,
the only authentic texts are the Staff Regulations of Officials of the
European Union
and the Conditions of Employment of other servants of the European
Union¹.**

¹ Council Regulation (EEC, Euratom, ECSC) No 259/68 of 29 February 1968 (OJ L 56, 4.3.68), and subsequent amending Regulations.

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1 The pension

1.1 Retirement pension

Serving officials, temporary staff and contract staff are covered by the pension scheme of the European Union Institutions, to which they make a monthly contribution.

They are eligible for a retirement pension on completing ten years' service or if they have reached pensionable age at the end of their service. Pensionable age varies depending on the date of the last contract.

Under the scheme, a retirement pension of not more than 70% of the final basic salary is paid.

The retirement pension is payable from the first day of the calendar month following the month in which the official or other servant becomes eligible for it, either automatically on reaching the maximum retirement age (depending on the date of the last contract), or on request from the time when he or she reaches pensionable age².

Officials or other servants who have acquired the right to a retirement pension may retire voluntarily before they reach pensionable age. If they do, they may opt at the time of their departure either for payment of the retirement pension to be deferred until they reach pensionable age, or for the pension to be paid immediately at a reduced rate.

Pensions may not be combined with a salary paid by a European Institution or agency³.

² Within the meaning of Articles 52 and 77 of the Staff Regulations or Articles 22 and 23 of Annex XIII.

³ Article 40 of Annex VIII.

1.2 Survivor's pensions

1.2.1 General

The Staff Regulations provide for payment of a survivor's pension to:

- a) the spouse, provided that the marriage lasted for at least one year if it was entered into before the official left the service, or five years if it was entered into after the official left the service. The duration of the marriage is not taken into account in the case of people receiving an invalidity allowance if the couple were already married before the official left the service; otherwise the couple must have been married for a minimum of five years;
- b) children who are recognised as dependants of the deceased at the time of his or her death:
 - up to a maximum age of 26 if they are in education;
 - with no age limit if they are recognised as being prevented by serious illness or invalidity from earning a living at the time the person receiving the pension died;
- c) persons treated as dependent children;
- d) a former spouse, provided that he or she is being paid maintenance in accordance with a court order or a duly registered and executed settlement between spouses;
- e) a non-marital partner, provided that he or she meets the criteria (in particular that there is no possibility of legal marriage).

1.2.2 Entitlements

- a) As a general rule, the survivor's pension is equal to either 60% of the deceased's basic pension or 35% of their final basic salary according to the scale in force at the time of death, as long as this amount is not more than the deceased's final net pension.
- b) The orphan's pension is equal to 40% of the survivor's pension - subject to a minimum of 50% of the salary of an AST 1/1 (for officials, temporary staff and contract staff alike) - for the first child, plus an amount equivalent to the dependent child allowance for each additional child. The total amount will be divided equally among all the children.

If there is no surviving spouse, the orphan's pension is doubled (80% of the theoretical survivor's pension with a minimum of 100% of the salary of an AST 1/1 for the first child with the addition of a double dependent child allowance for each additional child).

- c) The orphan's pension for persons treated as dependent children may not be more than twice the dependent child allowance.
- d) The survivor's pension paid to the ex-spouse is limited to the amount of the maintenance payments. Where there is both a spouse and an ex-spouse, the survivor's pension is divided between them in proportion to the number of years they were married.
- e) The rules for a non-marital partner are the same as for married partners.

Bear in mind that the survivor's pension is calculated differently when someone dies in active employment.

1.2.3 Important details

All the net survivor's pensions added together may never exceed the last net pension.

The deceased's pension continues to be paid to the surviving spouse or dependent children for three months following the month of death. The survivor's pension is payable from the first day of the fourth month following the month of death.

In the case of an ex-spouse receiving maintenance, the survivor's pension is payable from the first day of the month following the month of death.

The entitlement of a spouse or ex-spouse to a survivor's pension ceases on remarriage. He or she is entitled to immediate payment of a lump sum equal to twice the annual amount of the survivor's pension provided there is no recipient of an orphan's pension.

Payment of pension rights must be requested within a year of the death of the retired staff member otherwise entitlement will lapse⁴.

⁴ Articles 70 and 79 to 81a of the Staff Regulations; Articles 17 to 29 of Annex VIII thereto.

2 Invalidity allowance

2.1 General

Officials, temporary staff and contract staff who are unable to perform their duties for health reasons may be entitled to an invalidity allowance (under the conditions laid down in the Staff Regulations and the Conditions of Employment of Other Servants (CEOS)).

The decision to pay an invalidity allowance is taken by the appointing authority (AIPN) in the case of officials and the authority empowered to conclude contracts of employment (AHCC) in the case of temporary and contract staff.

2.2 Entitlements

a) Allowance for non-work related invalidity:

The invalidity allowance is set at 70% of the last basic salary. It may never be less than the minimum subsistence figure (100% of an AST 1/1 salary for officials or temporary staff and 100% of a function group I/1 salary for contract staff). Pension contributions will continue to be levied on the invalidity allowance.

b) Allowance for work-related invalidity:

An allowance for work-related invalidity is payable if the invalidity arises from an accident in the course of or in connection with the performance of one's duties, from an occupational disease, from a public-spirited act or from risking one's life to save another human being.

It may not be less than 120% of the minimum subsistence figure and the pension contributions are borne by the former employer.

2.3 Important details

The income tax due to the Union and the sickness insurance premium will still be deducted.

The solidarity levy and accident insurance premiums will no longer be charged.

Entitlement to reimbursement of 80-85% of medical costs under the Joint Sickness Insurance Scheme will continue.

Entitlement to the expatriation or foreign residence allowance will be lost.

Staff may be asked to undergo regular medical examinations to check that they still meet the criteria entitling them to this allowance. If this is no longer the

case, the staff member will be reinstated, unless he or she is a member of the temporary or contract staff whose contract has expired.

Please note that the entitlements set out below apply both to those receiving a retirement pension and to those receiving an invalidity allowance.

3 Family allowances

3.1 General

The Staff Regulations⁵ provide for payment of the following family allowances to pensioners⁶:

- household allowance,
- dependent child allowance,
- education allowance.

European Union family allowances supplement national allowances. The amount of national allowances of the same nature received by the pensioner, the spouse, the person looking after the child or the child itself is therefore deducted from the allowances paid under the Staff Regulations.

The person concerned is required to declare such amounts to the Pensions Unit.

When a person retires their entitlements do not change, but PMO.4 may ask for new supporting documents.

-> see point 11. Departments at your service

-> For more information

⁵ Articles 67, 68 and 81 of the Staff Regulations and Articles 1 to 3 of Annex VII thereto.

⁶ A former contract agent in receipt of a retirement pension must have more than three years' service in that capacity to receive family allowances.

3.2 Household allowance

The household allowance is granted to a pensioner who:

- a) is married;
- b) is widowed, divorced, legally separated or single and who actually maintains one or more children eligible for the dependent child allowance;

-> see point 2.3. Dependent child allowance

- c) is registered as a stable non-marital partner, provided that:
 - the couple produce a legal document recognised as such by a Member State, or any competent authority of a Member State, acknowledging their status as non-marital partners;
 - neither partner is married or in another non-marital relationship;
 - the partners are not related in any of the following ways: parent, child, grandparent, grandchild, brother, sister, aunt, uncle, nephew, niece, son-in-law, daughter-in-law;
 - the couple do not have access to legal marriage in a Member State. A couple are considered to have access to legal marriage only where both partners meet all the conditions laid down by the legislation of a Member State permitting such a marriage;
- d) is in practice assuming family responsibilities, despite not fulfilling condition (a), (b) or (c); in this case the allowance is granted by special reasoned decision of the appointing authority based on supporting documents.

However, even if a person receiving a pension meets the criteria for the household allowance, he or she will not receive it if his or her spouse is gainfully employed, with a pre-tax annual income of more than a certain ceiling (there is no threshold for retired spouses). This ceiling is equal to the basic annual salary of an official in the second step of grade 3 weighted at the rate for the country where the spouse carries on his or her occupation. For example, in 2014 in Belgium (i.e. without the weighting factor) the ceiling was EUR 42 825.84.

The appointing authority may grant a derogation by special decision, however. The allowance will continue to be granted where there is at least one dependent child⁷.

If the spouse receives a pension from the European Union or is a serving EU official (or member of the temporary or contract staff) and is consequently also entitled to the household allowance, the allowance will be paid only to the person whose pension or basic salary is the higher⁸.

3.3 Dependent child allowance

The dependent child allowance is payable in respect of the legitimate, natural or adopted child of a former official (or former member of the temporary or contract staff) or of his/her spouse, where that child is actually maintained by him/her. The Pensions Unit must therefore be informed of any earned income received by the child.

Any **child** whom the retired staff member has a legal responsibility to maintain under a judicial decision based on Member States' legislation on the protection of minors will be treated as a dependent child.

The dependent child allowance is also payable to the **surviving spouse** in receipt of a survivor's pension in respect of a child who, although not the child of the deceased official (or member of the temporary staff), was nevertheless actually maintained by him/her at the time of death.

A surviving spouse is also entitled to an orphan's allowance in respect of a **child** born within 300 days following the death of the former official (or member of the temporary or contract staff). However, there is no entitlement to the allowance in respect of the children of a person in receipt of an orphan's pension.

The allowance is paid automatically for **a child up to and including the month in which his/her 18th birthday falls**, provided the child is actually maintained by the recipient of the allowance and does not have an earned income of more than 25% of a grade AST 1/1 basic salary after the application of the weighting factor.

Once the **child reaches the age of 18**, the allowance is paid, on application, if he/she is attending an educational establishment on a regular, full-time basis or

⁷ Within the meaning of Article 2 of Annex VII to the Staff Regulations.

⁸ Article 1 of Annex VII to the Staff Regulations.

receiving vocational training. In addition, he/she must actually be maintained by the recipient and not have an earned income of more than 40% of a grade AST 1/1 basic salary after the application of the weighting factor.

A surviving spouse in receipt of a survivor's pension is entitled to twice the amount of the allowance in respect of each child.

Entitlement to the dependent child allowance ceases from the first day of the month following that in which the **child reaches the age of 26**. However, payment of the allowance in respect of a child prevented by serious illness or invalidity from earning a living, doubled if necessary as provided above, continues throughout the period of illness or invalidity, irrespective of age.

A tax allowance is possible for a child over the age of 18 who is seeking employment and is still being maintained by the person in receipt of a pension but is not receiving education or training (as defined above). This is equal to twice the amount of the dependent child allowance deducted from the basic taxable pension and is granted on application only.

Once the child has reached the age of 26, the additional tax allowance is granted only if the child is regularly receiving education or training (as defined above) begun before that age. However, it is definitively abolished as from the first day of the month following that in which the child reaches the age of 30⁹.

3.4 Education allowance

3.4.1 Education allowance A

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).

3.4.2 Education allowance B

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

⁹ Articles 67 and 81 of the Staff Regulations; Article 2 of Annex VII thereto.

b) The flat-rate education allowance (code ISF on the pension statement) is payable for each child attending a higher education 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 and not 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 the military service.

NB:

The application form and an information brochure are available on the Europa website:

<https://www.ec.europa.eu/pmo/education-allowances.htm>

3.5 Allowance for persons treated as dependent children

A person who is not a dependent child but is actually maintained by the pensioner may, by way of exception, be treated as a dependent child on the following two conditions:

- the pensioner must have a legal responsibility to maintain this person;
- maintenance must involve heavy expenditure.

The pensioner must provide proof that these two conditions are met. If the allowance is granted, the Administration is responsible for checking regularly that the requirements continue to be met¹⁰.

¹⁰ Article 2(4) of Annex VII to the Staff Regulations.

4 Membership of the JSIS

4.1 Persons covered

	Who can be a member of the JSIS?		
	Official	Temporary staff member	Contract staff member
RETIREMENT PENSION	Yes	Yes	Yes, if they have completed more than three years' service. Not covered by the JSIS if three years' service or less.
EARLY RETIREMENT (WITH OR WITHOUT REDUCTION), DEFERRED PENSION	Yes, on condition that they are not in gainful employment		Yes, if they have completed more than 3 years' service and on condition that they are not in gainful employment
SURVIVOR'S PENSION	Receives the entitlements received by the deceased at the time of death.		
INVALIDITY ALLOWANCE	Yes		

Any person receiving an EU retirement¹¹ or survivor's pension or an invalidity allowance is a member of the Joint Sickness Insurance Scheme (JSIS) with primary cover, with the exception of members of the contract staff who have not completed more than three years' service in that capacity.

Former officials or members of the temporary or contract staff who have left the service and taken early retirement (in accordance with Article 9 of Annex VIII to the Staff Regulations) are covered on condition that they are not in gainful employment or if they prove that they cannot obtain cover under a national health insurance scheme.

Anyone planning to leave the service under that Article should contact the Sickness and Accident Insurance Unit.

-> see address in point 11.4. Sickness and Accident Insurance Unit

¹¹ A former contract agent in receipt of a retirement pension must have at least three years' service in that capacity to receive sickness insurance cover.

The JSIS covers a pensioner's registered stable, non-marital partner, provided that:

- the couple produce a legal document recognised as such by a Member State, or any competent authority of a Member State, acknowledging their status as non-marital partners;
- neither partner is married or in another non-marital relationship;
- the partners are not related in any of the following ways: parent, child, grandparent, grandchild, brother, sister, aunt, uncle, nephew, niece, son-in-law, daughter-in-law.

If the relationship is recognised by the JSIS, a partner will be considered as a spouse for the purposes of sickness insurance cover (in this case contact the member's Settlements Office).

-> see point 4.3. Settlements Offices

Important!

With regard to the rights of a member's spouse/partner to sickness insurance cover, it is essential that the member checks and amends where necessary the information in the "My family" tab in the electronic retirement request.

Persons covered by a member's insurance:

a) The member's spouse/recognised partner, where he/she is not a member of the Scheme, provided that:

- he/she is not in gainful employment, or
- if gainfully employed or in receipt of income from previous gainful employment, he/she is not covered against the same risks by other statutory or administrative provisions (such as pension, unemployment benefit, maternity allowance or other) and his/her annual pre-tax income from such employment does not exceed the annual basic salary of an official of Grade AST 2/1, weighted for the country in which such income is received;
- he/she is fully covered against the same risks under any other legal or statutory provisions.

b) Top-up cover may be granted, on application, using the form for establishing retirement pension rights, to which the supporting documents concerning the income (or pension/allowance) of the spouse/recognised partner should be attached (the spouse/recognised partner's most recent tax statement).

c) In order for insured persons to continue to benefit from top-up cover under this Scheme members must provide, in the first half of each year, the spouse/recognised partner's most recent tax statement.

d) The member's dependent children in respect of whom he/she is entitled to dependent child allowance as defined at point 2 above. If dependent children are eligible for reimbursement of medical care under another legal or statutory sickness insurance scheme, the JSIS provides top-up cover.

A twelve-month extension may be granted in respect of a child who is not in gainful employment, as from the date on which the dependent child allowance ceases to be granted. Contact your Settlements Office in order to apply for an extension¹².

-> see point 4.3. Settlements Offices

e) If an allowance for a person treated as a dependent child has been granted and if the person in question does not have primary cover under a national social security scheme, that person may receive primary cover under the JSIS. Top-up cover is not possible in that case.

A twelve-month extension may be granted in respect of a person treated as a dependent child who is not in gainful employment, as from the date on which the allowance for a person treated as a dependent child ceases to be granted. Contact your Settlements Office in order to apply for an extension¹³. Further information may be obtained from the department in the member's Institution responsible for the Joint Sickness Insurance Scheme¹⁴.

-> see contact details in point 11.4. Sickness and Accident Insurance Unit

¹² see Article 72(1)(b) of the Staff Regulations.

¹³ see Article 72(1)(b) of the Staff Regulations.

¹⁴ Article 72 of the Staff Regulations; Rules on Sickness Insurance for Officials of the European Communities.

4.2 Funeral expenses

Funeral expenses are reimbursed up to a ceiling of EUR 2 350 in the event of the death of a member of the Scheme or a person covered by a member's insurance. Applications, accompanied by the death certificate and receipted bills, should be sent to the member's Settlements Office (see below). Further information may be obtained from the department in the member's Institution responsible for the Joint Sickness Insurance Scheme¹⁵.

-> see contact details in point 10.4. Sickness and Accident Insurance Unit

4.3 Settlements Offices

The reimbursement scheme remains unchanged. Members' JSIS files may be transferred to another Settlements Office, depending on their country of residence (see list below). In that case, they will be informed by letter.

For pensioners the rate of reimbursement in the event of an accident is only 80-85% (standard rate of reimbursement for medical expenses).

-> see point 5.2. Optional group accident insurance

The Settlements Office with which pensioners are registered is determined by their country of residence, as notified to the Pensions Unit.

A list of the Offices and the countries they cover is given below. Pensioners whose Settlements Office changes when they draw their pension will be informed by letter and their file will automatically be transferred to the appropriate Office.

Country of residence	Settlements Office with which members are registered
Germany, Austria, Luxembourg	Luxembourg
Spain, France, Ireland, Italy, Netherlands, Portugal, United Kingdom and Switzerland	Ispra
Other countries	Brussels

-> see point 11. Departments at your service

¹⁵ Article 10 and Annex I Section XIV to the Rules on Sickness Insurance for Officials of the European Communities.

5 Transfer of part of the pension

5.1 BHW contract - BHW insurance - UGPFE insurance

Former officials (or temporary or contract staff members) may continue to make certain transfers of part of their remuneration already in effect before they left the service. This applies only to transfers in respect of a BHW building savings contract (entered on the pension statement under code PC2, PC6, PC8 or PC3), BHW insurance (code PBW), UGPFE insurance (code PBH) or reimbursement of a Commission loan (code PCS).

However, the conditions covering transfers provided for in Article 17(3) of Annex VII to the Staff Regulations cannot be continued, since they apply only to active officials and temporary or contract staff. The Commission's monthly accounting rate of exchange will be applied to all such transfers carried out after termination of service, until the end of the contract. The amount of the transfer must be the same as or less than before. The Commission merely provides a service, and cannot settle disputes between the parties.

The terms of insurance contracts should be carefully checked because in some cases the contract has to be adapted to maintain cover once the policyholder has left the service.

5.2 Accident insurance

The compulsory accident insurance cover provided for officials and temporary staff under the Staff Regulations ceases when they retire¹⁶.

For additional information on accident insurance, please consult point 12.1.10. "Optional group insurance policies" - in the chapter on the AIACE.

¹⁶ Article 73 of the Staff Regulations.

6 Payment of pensions

6.1 Bank and currency of payment of pension

If the country of residence is an EU Member State, the pension will be paid in euros into a bank in the European Union (i.e. the pensioner can have his or her pension paid in another EU country).

Please note that in the case of a person who entered the service before 1 May 2004, the pension is paid into the EU bank of his or her choice, but only in the currency of the country of residence.

If the country of residence is outside the EU, the pension will be paid:

- in euros into a bank in the European Union or in the country of residence;
- in the currency of the country of residence, converted at the most up-to-date exchange rate used for implementing the EU's general budget.

6.2 Timing of payments

Pensions are paid monthly in arrears at the end of the month¹⁷.

6.3 Weighting factors

The reform of the Staff Regulations on 1 May 2004 provided for the abolition of the weighting factors applicable to pensions. However, pension rights acquired prior to the entry into force of the reform continue to be adjusted according to the weighting factor for each Member State. The minimum weighting factor is 100. A coefficient of 100 is also applied for residents of non-Union countries.

For the pension to be subject to the weighting factor fixed for the country of residence or the place where the staff member was last employed, pensioners must prove that they have established their main residence in one of these two countries.

¹⁷ Article 45 (1) of Annex VIII to the Staff Regulations.

Pensioners must provide supporting documents at the request of the Pensions Unit:

- upon retirement;
- as part of the two-yearly declaration;
- whenever there is a change of address, which must be declared immediately to the Pensions Unit.

This place of residence will be the only one used for the purpose of mailing pension statements and all other correspondence¹⁸.

Explanations are given below of the concept of main residence within the meaning of the Staff Regulations and the conditions in which residence must be established for the purposes of granting the weighting factor.

6.3.1. Definition of residence

"Main residence" within the meaning of Article 20 of Annex XIII to the Staff Regulations refers to the place where the person concerned has elected to establish his or her main centre of interests with the intention of doing so in a stable and permanent fashion.

The concept of "main centre of interests" includes a number of aspects (family and social ties, domicile for tax purposes, heritable interests, professional activity, stable and permanent presence, volume of expenditure, etc.), which do not always correspond to the same place.

When determining the main centre of interests, and therefore the main residence, close attention must be paid to the last of these criteria, namely expenditure by the pensioner, since the main place of residence has in fact to be determined essentially for the purpose of granting the weighting factor, the aim of which is to help ensure that the Institutions' pensioners enjoy equivalent purchasing power irrespective of the country of the Union in which they choose to settle after retirement and are, therefore, presumed to incur the bulk of their expenditure.

The Pensions Unit will therefore try to obtain the fullest possible information on this subject, with due regard for personal privacy.

¹⁸ Article 20 of Annex XIII to the Staff Regulations.

6.3.2. Burden of proof

Community pensions are weighted at the rate fixed for a Member State where the recipient has "established proven main residence"¹⁹.

It is therefore up to pensioners to provide proof of their place of main residence. In accordance with established case-law, pensioners can provide proof of residence by any means which they consider appropriate, but the Administration can also require any further proof it considers necessary.

In practice, it is the pensioner who must make a statement declaring his/her main place of residence and produce the supporting documents on the basis of which the relevant department is to decide whether or not to grant the weighting factor.

If insufficient evidence is provided in support of an application, the managing department will not grant the weighting factor and may, if it is impossible to determine the place of residence with sufficient certainty, suspend application of any weighting factor (which is then set at 100).

6.3.3. Documents to be provided

An official document is of value for determining residence²⁰ only to the extent that it can establish the true location of the principal and permanent centre of interests of the pensioner in a particular country.

Generally speaking, the official documents issued by national and local authorities, such as a residence permit, or certificate of domicile or residence, are not sufficient to establish the stable and permanent character of the place of residence.

This means that further supporting documents must be requested, such as documentary evidence of a private nature, e.g. proof of ownership of a property or a lease, utility bills (water, electricity, gas, fixed telephone line) or proof of taxation based on a residence criterion (property tax, taxes for drainage, refuse collection, sewerage, etc.).

¹⁹ Article 20 of Annex XIII to the Staff Regulations.

²⁰ Residence within the meaning of Article 20 of Annex XIII to the Staff Regulations.

In the majority of instances, a single document will not be sufficient to prove that the pensioner resides most of the time in the place indicated. This is why he/she must provide the managing department with a consistent set of documents.

This collection of supporting documents is part of the vetting of files by the departments dealing with pensions within each Institution. If these documents are not sufficient, the weighting factor will not be granted or if it is, although doubts remain, a later administrative investigation may be conducted.

Below is a list of the documents most frequently requested in the first instance from pensioners.

Upon retirement	
No removal or resettlement and weighting factor > 100	- certificate of residence (or equivalent) ²¹
No removal or resettlement and weighting factor = 100	- none
With removal and weighting factor > 100	- certificate of residence (or equivalent) - removal from register in previous local authority - recent utility bill (water, gas, electricity, landline telephone) or proof of connection - removal invoice - lease or purchase agreement - (solemn) declaration of residence
With removal and weighting factor = 100	- certificate of residence (or, if no such document is issued, another equivalent official document)

A reminder of these requirements will be issued at the appropriate time.

6.3.4. Request for further information

If the pensioner's answer is incomplete or if contradictory information throws doubt on the proof of residence, further information will be requested. The pensioner may also produce any other supporting document he/she considers relevant.

²¹ This document does not exist in Ireland, France or the United Kingdom.

6.3.5. Decision

On the basis of the information in its possession, the department concerned will decide to grant, refuse or not fix (i.e. weighting factor=100) the weighting factor. Particularly where the decision goes against the applicant, it must be properly justified.

The appointing authority may reassess a previous decision to grant the weighting factor, either maintaining it, amending it, or suspending its application.

6.3.6. Administrative investigation

In exceptional situations where there are doubts about the pensioner's genuine place of residence, an administrative investigation conducted by an appropriate body may be initiated.

The authority in charge of such an investigation may carry out checks including:

- authenticity of the documents submitted;
- geographical breakdown of medical expenditure (excluding information of a medical nature);
- volume of consumption of the various utilities (water, gas, electricity, landline telephone);
- size of the removal carried out on leaving the place of employment;
- unannounced on-the-spot checks.

Depending on the outcome of the investigation report, the decision to grant the weighting factor may be reconsidered and overpayments may be recovered.

6.4 Annual adjustment of pensions

According to the current method, the scales of basic salaries used as a reference for calculating remuneration, allowances and pensions are adjusted each year, along with the rates of exchange applied to those emoluments; the adjustment decision is taken at the end of the year and backdated to 1 July. If there is very high inflation in a particular country, the Council may decide in the course of the year to adopt an interim weighting factor with effect from 1 January²².

²² Articles 63 and 82 of the Staff Regulations.

6.4.1 How is the exchange rate calculated?

- If the pension is paid in an EU Member State, the exchange rate is calculated on an annual basis and updated once a year in July.
- If the pension is paid in a non-EU country, the exchange rate is calculated monthly and the amount of the pension varies from month to month.

6.4.2 How is the weighting factor fixed?

The purpose of the weighting factor is to ensure that pensioners enjoy equivalent purchasing power irrespective of their country of residence.

The Council adopts the Regulation laying down the weighting factors applied to the pensions of officials and members of the temporary and contract agent of the European Union.

This exercise may give rise to adjustments upwards or downwards, depending on the fluctuation of the weighting factor and/or the exchange rate of the country of residence.

6.5 European Union emoluments and national taxation

Following the 1960 Humblet judgment, EU pensions are subject to income tax levied by the European Union but exempt from national taxation. A tax certificate to be attached if required to the recipient's tax declaration will be issued automatically by the Pensions Unit (PMO/4).

Generally speaking, the pension received by a former official cannot be taken into account at national level for the purposes of imposing tax at a higher level than that calculated on the basis of revenue other than the income referred to in the second paragraph of Article 13 of the Protocol.

As regards the obligation to declare the amount of an EU pension to the national tax authorities for taxation purposes, the Court of Justice has ruled that *"In the interest of legal certainty, given that the income paid by the Union and subject to the Union's own tax cannot be taxed either directly or indirectly by a Member State and given that it is withdrawn from the tax sovereignty of the Member States, a person in receipt of such income is also exempt from any obligation to declare the amount of such income to the authorities of a Member State"* (Judgment of the Court of 5 July 2012 in Case C-558/10).

It should be remembered that, although former officials may not be taxed on their pension, they cannot claim preferential treatment in relation to other

citizens in cases where certain benefits are linked to an income ceiling (e.g. renovation grants, study grants, etc.). It is therefore advisable to declare revenue from EU pensions in these cases.

Please note that exemption from national taxation applies **only** within the Member States; recipients who settle outside the Union will be subject to the tax legislation of their country of residence. In practice this means that they may be liable to a second tax on income from the European Union from which EU tax has already been deducted. They should make sure that they obtain all the relevant information from the national authorities in order to avoid problems at a later date²³.

It should be noted that there is an exemption agreement with Switzerland; EU pensions are exempt from federal, cantonal and communal taxes within the territory of the Swiss Confederation according to the principles of its national law.

7 Rights at the time of retirement (reimbursement of expenses)

Under Article 71 of the Staff Regulations, officials are entitled to reimbursement of the expenses they incur on leaving the service, as provided for in Annex VII to the Staff Regulations.

These include:

- removal expenses, from place of employment to place of origin (Article 9 of Annex VII);
- travel expenses from place of employment to place of origin
- (Article 7 of Annex VII);
- a resettlement allowance (Article 6 of Annex VII).

Removal and travel expenses cover only the costs incurred by the former staff member in moving his or her residence from their place of employment to their place of origin. If their new place of residence is not their place of origin,

²³ Article 2 of Council Regulation No 549/69 of 25 March 1969 as it relates in particular to the implementation of Article 13 of the Protocol of 8 April 1965 on the Privileges and Immunities of the European Communities.

therefore, they need **to ask for their place of origin to be changed**, in order to qualify for such expenses. This can only be done in certain conditions and at certain times.

Procedure:

- Once officials reach the age of 55 they may, in preparation for retirement, request that their place of origin be changed, on production of appropriate documentary evidence relating to heritable interests in the form of immovable property already built or under construction (apply to PMO.1 with proof of ownership of the property and recent utility bills for that address).
- Upon termination of service and in the light of their place of resettlement, the place of origin of officials or other staff may be changed at their request and on production of appropriate documentary evidence, by special decision of the appointing authority (apply to PMO.4, the Pensions Unit, with documentary proof of the transfer of residence and the centre of interest to the new location).
- Following termination of service for family or medical reasons which arose after retirement (see Article 20 of Annex XIII to the Staff Regulations, Article 6 of Commission Decision C(2013) 8992 final of 16 December 2013 and Internal directive No 91/2004), officials may exceptionally request the appointing authority (PMO.4 Pensions Unit) to change their place of origin. This decision is taken on production of appropriate supporting evidence by the person concerned.

->see point 11.6. Other useful links

7.1 Reimbursement of removal expenses²⁴

Procedure:

Expenses, including risk insurance (breakages, theft, fire), relating to the removal of furniture and personal effects from the place of employment to the place of origin are reimbursed within the limits of an estimate previously approved by the Administration.

At least six weeks before their probable moving date, staff must send an **estimate and an inventory** to the unit responsible in their last place of employment.

Commission unit responsible:

- PMO.1 Administration of Individual Rights (for staff based in Brussels or other EU capitals, certain agencies, Ispra and the Joint Research Centres);
- PMO.5 Luxembourg, if the last place of employment was Luxembourg;
- EEAS and Personnel Department of the delegation for staff retiring from a post in a delegation.

If, on examination, the Administration considers the estimates to be too high relative to normal prices, it may request an additional estimate or estimates from other removal firms. As a rule, the lowest estimate is the one chosen and reimbursement is limited to this amount.

Staffs are free to choose their removal firm, but if the bill exceeds the estimate selected they will be responsible for paying the difference.

Deadline:

The removal must take place within three years of leaving the service (except for staff leaving a post in a delegation: check the deadline with the EEAS). In exceptional circumstances, the Administration may take a decision to extend this deadline by up to one year where the staff member submits a written request to the Administration at their last place of employment (see above), setting out the reasons, before the deadline expires.

-> See For more information for the forms and other information on removals

²⁴ Article 9 of Annex VII to the Staff Regulations.

7.2 Resettlement allowance²⁵

Former officials who transfer their residence within three years of leaving the service and relocate to a place at least 70 km from their place of employment are entitled to a resettlement allowance equivalent to two months' basic salary, provided that they are eligible for the household allowance and their dependant family resettles with them. In some cases, retiring staff members receive a resettlement allowance equivalent to one month's basic salary:

- if they are not eligible for the household allowance,
- if they receive the household allowance but no members of their family are resettling with them,
- if they receive the household allowance but are rejoining their family.

'Family' means dependent family members who are normally living under the same roof as the official when he or she leaves the service.

To qualify for this allowance, an official must have completed at least four years' service.

A member of the temporary staff must have completed more than one year's service to qualify for a quarter of the full allowance, two years' service for half the allowance, three years' service for three-quarters of the allowance and four years' service for the entire allowance.

To receive the allowance, recipients must prove that their accommodation costs are their own responsibility and are not met by a third party (e.g. parent, employer, etc.).

Procedure:

To obtain the resettlement allowance, recipients must submit the relevant application form together with documentary evidence that they have indeed changed their usual residence from their place of employment to their new location. Such evidence should include, as a minimum, proof that they have had their name removed from the population register at their place of residence at their last place of employment and proof of registration with the local authorities at their new address. In addition, they must provide a copy of a lease/deed of purchase for a property at this address.

²⁵ Article 6 of Annex VII to the Staff Regulations.

The Administration reserves the right to request additional documentary evidence.

Deadline:

The application must be made within three years of leaving the service. This period may not be extended. No application will be accepted after the end of the three years.

7.3 Travel expenses²⁶

Pensioners who relocate to their place of origin are entitled to a refund of travel expenses from their place of employment to their place of origin, for themselves and their spouse and dependants genuinely resident under their roof on the date on which they leave the service, provided that these travel expenses have actually been incurred in connection with their transfer of residence.

Procedure:

Fill in an application for reimbursement and attach documentary evidence.

The flat-rate payment is based on an allowance per kilometre of geographical distance between the place of employment and the place of origin. Expenses will not be reimbursed if this distance is less than 200 km.

Deadline:

Three years from the date of leaving the service.

-> See point 11.6. Other useful links

Forms available:

- submission of estimates for removal expenses;
- specimen for removal estimate;
- declaration of travel expenses;
- application for resettlement allowance.

-> See For more information

²⁶ Article 7 of Annex VII to the Staff Regulations.

8 Application of the Protocol on Privileges and Immunities

On leaving the service, pensioners cease to be covered by the Protocol on Privileges and Immunities which governed their administrative situation vis-à-vis the Member State of their place of employment, except for Article 12 (-> **see point 6.5** as regards exemption from national taxes on salaries, wages and emoluments paid by the European Union and hence on the EU pension). They thus become subject to the national legislation in force in the country where they choose to reside after leaving the service, which means that they must carry out certain administrative formalities.

8.1 Special identity card

Pensioners with a special identity card must return it to the relevant department in their place of employment.

-> see contact details in point 11.3. Unit HR.B.1 Ethics, Rights and Obligations

For officials or members of the temporary or contract staff working in Brussels:

The special identity card is issued by the Belgian authorities to officials or members of the temporary or contract staff in active employment residing in Belgium (and to family members dependent on them). The special identity cards of the entire family (even expired cards) must therefore be returned when an official leaves the service. If a card is lost, the official can arrange for a "declaration of loss" to be drawn up by any police station in Belgium for themselves or for the members of their family.

- Pensioners who go on living in Belgium:

Pensioners with a special identity card must return it (together with those of their family members) to the Privileges and Immunities Section of Unit HR.B.1. Within about three weeks, a certificate authenticated by the Federal Public Service for Foreign Affairs will be sent to their home. This certificate will enable them to apply to the municipal authority of their place of residence for a residence permit.

- Pensioners who settle outside Belgium:

Pensioners with a special identity card must return it (together with those of their family members) to the Privileges and Immunities Section of Unit HR.B.1 within two months of leaving the service. In this case, the Commission informs the

Ministry of Foreign Affairs of their departure and it will contact the relevant local authority to remove their name from the population register. Pensioners are themselves responsible for contacting the authorities at their new address in order to complete the administrative formalities required by their new country of residence.

If possible, pensioners should come and hand in their special identity cards in person to the Privileges and Immunities Section of Unit HR.B.1 to ensure that all the details contained in their file are correct and thus simplify matters for themselves in future. However, if that is not possible, they are advised to send their special identity card by registered mail, accompanied by a brief note indicating:

- their personnel number while they were in active employment;
- if they are still living in Belgium: their full address and that of their family members;
- if they plan to leave the country: their new place and country of residence (address).

A copy of the letter sent by the Protocol department to the Belgian authorities indicating that their special identity card is being returned will be sent to the Pensions Unit.

For officials and temporary or contract staff working at the JRC in Ispra:

Pensioners who have a special identity card and were working at the JRC in Ispra must return the card (together with those of their family members) to the Individual Entitlements sector of Unit PMO/6 in Ispra before leaving the Commission. If they go on living in Italy, they are themselves responsible for completing the administrative formalities required by the Italian authorities to allow them to stay.

For further information, staff should contact the relevant department in their place of employment.

-> see contact details in point 11.3. Unit HR.B.1 Ethics, Rights and Obligations

8.2 License plates

Pensioners continuing to live in Belgium whose cars are fitted with EUR or international number plates must return these plates and have them replaced by Belgian national number plates as soon as possible, and in any case not later than two months after the date of retirement.

Procedure:

To obtain Belgian plates, a car registration application form bearing the insurer's stamp and a revenue stamp for EUR 25 must be obtained from the insurer; this form must be sent, along with the original of the registration papers (carnet d'immatriculation), to Unit HR.B.1 Ethics, Rights and Obligations, which then completes the relevant formalities with the DIV (*Direction pour l'Immatriculation des Véhicules* (Vehicle Registration Directorate)). This procedure takes three working days.

-> see contact details in point 11.3. Unit HR.B.1 Ethics, Rights and Obligations

Pensioners leaving Belgium are responsible for registering their car in their new country of residence and for returning their EUR number plates to the Privileges Section of Unit HR.B.1 "Ethics, Rights and Obligations".

Warning:

The official remains liable to pay Belgian road tax until the EUR or Belgian number plates have been returned to the Belgian authorities, unless the vehicle has previously been sold or immobilised.

It should also be noted that, for the purposes of cancellation, only the official number plate (usually the rear plate) is accepted.

Note:

If a pensioner whose car is registered with EUR plates remains in Belgium, the plates must be exchanged for normal Belgian plates. When changing plates the pensioner may be asked to pay the Belgian "taxe de première mise en circulation" (tax on first entry into service), since the Belgian computer system operates on the basis that a change of number plate means a change of owner. As new owners are liable for tax on first entry into service, the tax is applied automatically. The Belgian authorities are aware that in the case of a change from EUR to Belgian number plates the owner may still be the same and in that case the tax is not due; steps have been taken to adjust the computer system accordingly. In case of doubt or in the event of an error, staff should contact the Privileges and Immunities Section of Unit HR.B.1.

8.3 Driving licence

On leaving the service, officials and other staff do not need to exchange their existing driving licence (if it was issued in a Member State) for a driving licence in their country of residence (if within the European Union).

8.4 Fiscal residence

The domicile for tax purposes of retired officials or members of the temporary or contract staff is their main country of residence²⁷. This means that they must comply with the tax legislation in force in that country as regards all their income and assets other than their EU pension, which is exempt from national taxation²⁸. Moreover, the EU pension may not be taken into account for the purpose of determining the rate of taxation on any other income received by the pensioner or his/her spouse²⁹.

A certificate concerning the duration of service can be obtained from the Privileges Section of Unit HR.B.1 "Ethics, Rights and Obligations" and, after retirement, from the Pensions Unit (PMO/4).

-> see point 11.3. Unit HR.B.1 Ethics, Rights and Obligations

-> see point 11.5. Pensions Unit (PMO/4)

8.5 Community laissez-passer

Former officials or members of the temporary or contract staff holding a Community laissez-passer must return it to Unit HR.B.1 or PMO/6 (Ispra) upon leaving the service.

-> see point 11.3. Unit HR.B.1 Ethics, Rights and Obligations

²⁷ Article 14 of the Protocol on Privileges and Immunities ceases to apply.

²⁸ Under Article 12 of the Protocol on Privileges and Immunities.

²⁹ See Judgment of the Court of 24 February 1988 in Case 260/86 Commission v Belgium.

9 Other consequences of termination of service

9.1. Leave not taken or taken in excess of entitlement

In the event of termination of service or death of an official or member of the temporary or contract staff, a compensatory payment is made for leave not taken and a deduction made for leave taken in excess of entitlement. A day of leave not taken is equivalent to a thirtieth of the net monthly salary at the time of leaving the service.

The last DG for which the official worked will inform PMO how much leave he/she has left and PMO will then calculate and settle any outstanding amounts. For more detailed information we suggest you contact your DG's GECO.

9.2 Expatriation allowance and secretarial allowance

Persons in receipt of a retirement pension, invalidity allowance or survivor's pension are not entitled to an expatriation allowance or to a secretarial allowance³⁰.

9.3 Pensioner's pass

Pensioners may enter the institutions' buildings in Brussels as a visitor. As such, they must comply with the rules on access in force at reception in any building they visit.

Except for Ispra and certain other JRC sites, a pensioner's pass is available on request from the Brussels 'Access Card Service' of DG Human Resources and Security. This pass gives access to a limited number of buildings in Brussels and all the Commission's buildings in Luxembourg.

To obtain a pass, pensioners who were based in Brussels must come to the Access Card Service on their last working day before leaving the service.

³⁰ Article 4 of Annex VII to the Staff Regulations.

After that, to obtain or renew a pass – or in the case of pensioners from any other place of employment – a request must be submitted by post or e-mail to the Brussels Access Card Service, which will issue the pass and send it to the applicant by post (together with a list of the buildings in Brussels to which it gives access).

The request must include the following information: name, first name, pensioner's number, full address, date of birth and an identity photo (in .jpg format if sent by e-mail).

-> see point 11.2. Access Card Service (HR.DS4)

10 Obligations of former officials

10.1 Discretion and confidentiality

After leaving the service, former officials or members of the temporary or contract staffs are still subject to some of the same obligations as when they were working. In particular they must "behave with integrity and discretion" whether or not they carry on an occupational activity³¹.

In addition, in order to comply with the obligation to behave with discretion, former officials or members of the temporary or contract staff must "refrain from any unauthorised disclosure of information received in the line of duty, unless that information has already been made public or is accessible to the public"³².

Lastly, "an official shall not, without permission from the appointing authority, disclose on any grounds whatever, in any legal proceedings information of which he has knowledge by reason of his duties. An official shall continue to be bound by this obligation after leaving the service"³³.

After leaving the service, therefore, pensioners may not accept any duties that would be incompatible with the interests of the Union.

³¹ Article 16 of the Staff Regulations.

³² Article 17 of the Staff Regulations.

³³ Article 19 of the Staff Regulations.

Pensioners who wish to take up employment within two years of leaving the service should write to the relevant department at the Commission, in this case Unit HR.B.1, which will provide them with the details needed to assess the case³⁴.

-> see contact details in point 10.3. Unit HR.B.1 Ethics, Rights and Obligations

-> See For more information

10.2 Other obligations

Report any changes and provide supporting documents:

Officials and members of the temporary or contract staff and those entitled under them who receive benefits under the pension scheme must furnish such written proof as may be required and inform the Institution (the Pensions Unit) of any facts liable to affect their entitlement, including changes of address. Failure to do so may lead the Administration to suspend payment of the pension and allowances³⁵.

Return the biannual declaration promptly:

Every two years (and every year from the age of 80) the Pensions Unit checks on all pensioners to make sure that the conditions of entitlement to a pension and to family allowances are still met. The Unit will send out the forms in the month of the pensioner's birthday, to confirm in particular the information on the place of residence. The declaration (duly signed) and the proof-of-life certificate must be returned without fail for the pension to continue to be paid.

The proof-of-life certificate is a form filled in by a person in authority who can confirm that he or she has met the pensioner in person. This person may be an official representative of the local authority where the pensioner lives, a police officer, a doctor, etc.

-> See documents in annex

³⁴ Articles 16, 17 and 19 of the Staff Regulations; Articles 13 and 40 of Annex VIII thereto.

³⁵ Article 43 of Annex VIII to the Staff Regulations.

Repay amounts unduly paid:

If a pensioner has received an undue payment, he or she may be asked to repay it if the Administration can prove:

- that the recipient was aware that there was no due reason for the payment

OR

- that the undue nature of the payment was patently such that he/she could not have been unaware of it.

Consequently, the Administration may recover at any time amounts paid on the basis of false declarations or inaccurate or incomplete information, as soon as it becomes aware of the discrepancy³⁶.

³⁶ Article 85 of the Staff Regulations.

11 Departments at your service

11.1 Unit HR.C.1 Social Policy

Whatever type of pension a person receives, the Commission's social welfare services (HR.C.1) are always ready to provide help or advice. The kind of help provided includes listening, information, helping with administrative procedures within the Institution, requests for a home help, financial assistance, etc.

Social assistance can be obtained on certain conditions from the social welfare assistants at the pensioner's place of employment.

For more information, please contact the following departments:

Location	Address	Contact details
Brussels	MO 34, 01/40 B – 1049 Brussels	Tel.: +32.2.2959098 Fax: +32.2.2992199 E-mail: HR-BXL-ASSISTANCE-SOCIALE-PENSIONNES@ec.europa.eu
Luxembourg	DRB B0/003	Tel.: +352.4301.33948 Fax: +352.4301.31067
Ispra	Bldg.51 T.P. 510, Office 112 Via Enrico Fermi, 2749 I – 21027 Ispra (Va) Italy	Tel.: +39.0332.785910 Fax: +39.0332.783521

11.2 Access Card Service (HR.DS4)

Brussels and other places of employment:

EC – HR.DS4-Access Cards

Rue Montoyer, 34 (MO 34, Mez 120)

B – 1049 Brussels

Email: ec-security-titres-acces@ec.europa.eu

Opening hours: 9.00-16.00 Monday to Friday without interruption

11.3 Unit HR.B.1, Ethics, Rights and Obligations

Location	Address	Contact details
Brussels	<i>Application of the Protocol on Privileges and Immunities</i> Mr H. SPRUMONT MO 34, Mez 39 B-1049 Brussels Special identity cards MO 34, Mez 33 B-1049 Brussels Opening hours: 9.00-16.00 Monday to Friday (afternoons by appointment) Functional mailbox: HR-B1-CARTE-IDENTITE@ec.europa.eu Vehicle number plates MO 34, Mez 13 B-1049 Brussels Opening hours: 9.00-16.00 Monday to Friday Functional mailbox: HR-B1-IM-VEH-ET-TVA@ec.europa.eu Professional activity after leaving the service (Articles 16, 17 and 19 of the Staff Regulations) SC11 03/27 B-1049 Brussels Functional mailbox: HR-B1-ETHIQUE@ec.europa.eu	Tel.: +32.2.2952088 Fax: +32.2.2964303
Luxembourg	Welcome Office, privileges and immunities (identity cards, Jobkaart, Community laissez- passer) DRB A1/001	Tel: +352.430133.000 Fax: +352.430130.109
Ispra	Special identity cards, laissez-passer and service passports TP 062 Unit 2 HR B2 Via E. Fermi 2749 I – 21027 Ispra (Va) Italy	Tel: +39.0332.789084 Fax: +39.0332.785479

11.4 Sickness and Accident Insurance Unit

General information

PMO CONTACT: <https://ec.europa.eu/pmo/contact/>

Tel.: +32.2.2997777

Monday to Friday, 9.30 to 12.30

Settlements offices

Location	Address	Contact details
Brussels	European Commission Caisse Maladie (SC-27 0/5) Rue de la Science, 27 B-1049 Brussels	PMO CONTACT https://ec.europa.eu/pmo/contact/ Tel.: +32.2.2997777 Lettre de prise en charge (authorisation for direct billing): Tel.: +32.2.2959856 Fax: +32.2.2959701
Luxembourg	European Commission Caisse Maladie (Drosbach building) DRB B1/061 (mail service) L – 2920 Luxembourg	https://ec.europa.eu/pmo/contact/ Tel.: +352.4301.36100 Fax: +352.4301.36019 Lettre de prise en charge (authorisation for direct billing): Tel.: +352.430136103/36406
Ispra	Commissione Europea PMO/6 Site di Ispra Ufficio Liquidatore (TP 740)(bldg. 74) Via Enrico Fermi, 2749 I – 21027 ISPRA (VA)	https://ec.europa.eu/pmo/contact/ Segreteria telefonica (answering machine): Tel.: +39.332.785757 Fax: +39.332.789423 Per ottenere un'impegnativa (authorisation for direct billing): Tel.: +39.332.789966

Funeral expenses

Location	Address	Contact details
Brussels	Ms BITAR Nadia Rue de la Science, 27 2/01 B-1049 Brussels	https://ec.europa.eu/pmo/contact/ Tel.: +32.2.2950013 Fax: +32.2.2992898
Luxembourg	Ms PROVVEDI or Ms CHIANESE DRB B1/064 or B1/067 L – 2920 LUXEMBOURG	https://ec.europa.eu/pmo/contact/ Tel.: +352.4301.36330 or 34834 Fax: +352.4301.36019
Ispra	Ms E. DELLA CHIESA Commissione Europea PMO/6 Site di Ispra Ufficio Liquidatore (TP 730)(bldg. 73) Via Enrico Fermi, 2749 I – 21027 ISPRA (VA)	https://ec.europa.eu/pmo/contact/ Tel.: +39.332.786664 Fax: +39.332.789423

11.5 Pensions Unit (PMO/4)

The Pensions Unit is situated on the 4th floor of the building at 88, rue d'Arlon, Brussels. Please send all correspondence to the following address:

Sole postal address:

European Commission Fax: +32.2 2.965.373
Email: <https://ec.europa.eu/pmo/contact/>

Pensions:

- For general information on administrative formalities at the time of departure:

Tel.: +32.2.2997777.

Address: AN88 – 4th floor: by appointment only.

- After departure: The name and telephone number of the person responsible for the file can be found on the pension slip (top left-hand corner).

To make our Unit's work easier, we would prefer you to send all documents by post or internal mail rather than bringing them in person. Where necessary, contacting the pension's administrator may be the best solution.

For any further information:

Type of pension or allowance	Contact details
Retirement pensions Invalidity allowances	Tel.: +32.2.2997777 (PMO Contact) → See For more information ...
Widow's/widower's pension Orphan's pension	Tel.: +32.2.2952017 → See For more information ...
Allowances under Article 50	Tel.: +32.2.2998476
Severance grants	Tel.: +32.2.2997777 (PMO Contact) → See For more information ...
Unemployment allowance	Tel.: +32.2.2997777 (PMO Contact) → See For more information ...

Transfer of pension rights:

Tel.: +32.2.2997777 (PMO Contact) Functional mailbox: https://ec.europa.eu/pmo/contact/ Fax: +32.2.296.53.73 → See For more information...

11.6 Other useful addresses

Removal estimates and invoices:

Location	Address	Contact details
Brussels Departure from Delegation	PMO/1 AN88 05/30 B-1049 Brussels EEAS MDR C6 01/522 B-1049 Brussels	Ms C. CAPETA: Tel.: +32.2.2959373 or 9867 Email: PMO-BRU-REMOVALS@ec.europa.eu Ms Myriam MANNAERTS Tel.: +32.2.258.42.77 e-mail: MDR-C6-REMOVALS@eeas.europa.eu
Luxembourg	PMO/5, DRB B1/037 L-2920 LUXEMBOURG	Ms K. CHADWICK-LAISBY Tel.: +352.4301.32973
Change of place of origin		Units responsible
Before termination of service , changing your place of origin is handled by the unit which deals with individual entitlements in your place of employment		For contact details, see the table "Resettlement allowances" below.
- Brussels and secondments to EU capitals		PMO/1, B – 1049 Brussels
- Luxembourg :		PMO/5, L – 2920 Luxembourg DRB-B1/034 C. RENARD Tel.: +352.4301.36024
After termination of service , changing your place of origin is handled by the Pensions Unit		PMO/4, B – 1049 Brussels

-> See For more information

Resettlement allowance, travel expenses on leaving the service:

Location	Address	Contact details
Brussels	PMO/4 AN88 04/01 B-1049 Brussels	Tel.: +32.2 296.48.67 47 or +32.2.299.84.76 Email: https://ec.europa.eu/pmo/contact/
Departure from Delegation	EEAS MDR C6 01/518 B-1049 Brussels	Mr Luc STEEMAN Tel.: +32.2.258.25.79 Email: MDR-C6-DEL-INSTALLATION-RESETTLEMENT@eeas.europa.eu
Luxembourg	PMO/5 DRB B1/031 L – 2920 LUXEMBOURG	Ms K. CHADWICK-LAISBY Tel.: +352.4301.32973

12 Associations of former staff

Please note that this chapter has been written by the associations. The Commission bears no responsibility for its content.

12.1 AIACE: International association of former officials of the European Communities

12.1.1. Creation and Articles of Association

The AIACE was officially formed in June 1969, after the merger of the executives, as the body representing former officials and other servants of all the Community Institutions.

It is a non-profit making association established under Belgian law and is governed by articles of association.

In addition, it has rules of procedure which apply to the entire Association, while national branches have been set up with individual rules tailored to bring them into line with the law of the country where they are established. They thus have separate legal personality.

The AIACE is a non-political organisation.

12.1.2. Headquarters

The AIACE currently has its headquarters at the following address:

European Commission Tel. +32.2.295.29.60

SC-29 02/04

B – 1049 Brussels AIACE-INT@ec.europa.eu

International secretariat: Ms Descamps and Ms M’Ngala

12.1.3. Aims

The main aims of the Association are:

- a) to maintain close contacts with Community bodies and to represent the interests of former officials as widely as possible and, where necessary, defend them;
- b) to represent the interests of former officials in dealings with national authorities and, where necessary, to defend those interests in administrative and social matters;
- c) to maintain and foster the bond of friendship among former officials themselves and between them and serving staff; to organise or participate in cultural and leisure activities to that end;
- d) to provide the European Union Institutions with the benefit of its experience in preparing staff for retirement;
- e) to contribute to the study of problems relating to European integration and help heighten public awareness of them, and to collaborate with the European Union Institutions in this task;
- f) to maintain contacts and, where necessary, establish links with organisations which pursue similar aims at international, Community and national level.

12.1.4. Composition

The Association comprises a number of central bodies and national branches.

There were originally six national branches, one for each of the founding members of the European Union (Belgium, France, Germany, Italy, Luxembourg and the Netherlands). Nine other branches have been added since, namely Denmark, Finland, Greece, Ireland, Portugal, Spain, Sweden, the United Kingdom and most recently Austria. At the beginning of 2015, the AIACE had almost 10 500 members, almost half of all pensioners. This number is constantly growing.

The central bodies of the Association are the General Assembly, which includes all the members of the national branches, the Management Board and the International Bureau.

12.1.5. Annual congress and General Assembly

In principle, the national branches take it in turns to organise an annual congress in their home country. The first was held in Luxembourg in 1970, and the most recent in Oporto, followed by Brussels. In 2015 the venue will be Bratislava.

The congresses are organised with the annual General Assembly of the AIACE in mind. They comprise a symposium on a central theme and may be of political or social interest, or be regional or purely cultural in emphasis. The congresses thus have a dual purpose: to strengthen the bonds of friendship between the members of the AIACE throughout Europe and to familiarise them with one of the Member States. They also provide an opportunity to discuss together at the General Assembly the various problems connected with the Staff Regulations which affect former officials' interests.

12.1.6. National branches

Through their many social volunteers, specially trained for the purpose, they provide help for former staff and, in particular, work to defend their interests in dealings with the national authorities.

At more or less regular intervals throughout the year the national branches organise for their members a variety of events such as guided visits to museums and exhibitions, lectures, lunches or dinners with discussions on cultural or social topics, excursions and holidays abroad, informal get-togethers, etc.

Once a year, each branch committee convenes a general assembly of its members at which it presents the accounts for the past financial year, draws up the budget for the next financial year, presents a progress report and examines any proposals and requests submitted to it.

12.1.7. Publications

Three or four times a year, the AIACE publishes a magazine (VOX) containing reports on European current affairs, information from the Community administrative departments and details of national branch activities. This publication has a circulation of 24 000 and is sent to all pensioners, whether or not they are AIACE members.

Most national branches also publish a news bulletin for their members.

12.1.8. Relations with the European Institutions

The Association is officially recognised by all the European Institutions as the representative body for former officials and other servants. An initial agreement governing relations between the AIACE and the Commission was signed on 14 June 2002, and a new agreement to replace it was signed on 29 February 2008 by the President of AIACE and the Vice-President of the Commission.

Similar agreements have been signed with the European Parliament, the Committee of the Regions, the European Economic and Social Committee, the

Court of Justice and the Court of Auditors. In 2014 an agreement will be signed with the Council.

12.1.9. Eligibility for membership

Anyone who, as his/her main occupation, has served with one of the European Union Institutions or bodies and has ceased such activity may join the AIACE through any national branch. Following the death of a member, his/her spouse may join the AIACE in the same capacity.

This also applies to the spouse of a member of staff of a European Union Institution who dies while still actively employed. It is also possible to be a member of more than one branch.

-> see 11.1.12. Application form

12.1.10 Optional group insurance policies

The Associations have concluded agreements on a variety of different top-up insurance options.

For more information please contact AIACE or SEPS.

12.1.11 AIACE: National branches (application forms) and details for subscriptions

See www.aiace-europa.eu.

12.1.12 Application form

To join the Association, simply apply to the relevant branch(es). Application forms can be obtained from the International Secretariat of the AIACE.

12.2 SEPS: Association of Seniors of the European Public Service (formerly the AFPE)

12.2.1. Definition – Organisation

On 3 October 2008, the Association of Seniors of the European Civil Service (SEPS)³⁷ was set up as a non-profit-making association ('ASBL' under Belgian law), free from any political, trade union or confessional bias. Because it receives no subsidies and little logistical support it is independent of the Commission and the European Institutions.

It is a pluralist association: all socio-economic, (democratic) political, philosophical and religious viewpoints and all nationalities are allowed within the association. In particular, members of the association can be members of a professional organisation and/or a union.

SEPS Asbl is administered, as required by law, by a board elected by the general meeting (written procedure), with a mandate of three years.

SEPS' statutes can be consulted at www.sfpe-seps.be.

12.2.2. Aims and objectives

The aim of SEPS is to defend the interests of retired European officials and, as a matter of priority, their social rights.

Defence of acquired rights

Its main objective is to defend pensioners' acquired rights such as pensions, method of adjusting pensions to take account of the cost of living, sickness insurance scheme, allowances and any other relevant questions.

The Staff Regulations of officials of the institutions say very little about "post-active officials", even though there are more than 20 000 of them. Besides pensions, financial and social issues, there is also the question of the sickness insurance scheme, which spends a large part of its budget on pensioners even though they do not have voting rights on the JSIS Management Committee, which is supposed to be a joint committee!

³⁷ Formerly AFPE, a de facto association.

Retired staffs are not involved in negotiations either during normal periods of operation or during periods of crisis. This will not change as long as it is impossible to change the composition of the Staff Committee (Annex II to the Staff Regulations). A maximum of one AIACE observer (without the right to vote) is allowed to attend meetings of the major joint committees. So that it can be represented and kept informed at this point in time, SEPS is inviting older staff who are still in active service but nearing retirement and who wish to defend their future interests to join the Association and serve on the Administrative Board (established in December 2007).

A number of SEPS' members who are still in active employment are also on the Staff Committees and statutory joint committees. The professional and trade union organisations do not pay enough attention to retired staff for the simple reason that pensioners cannot take part in elections to the Staff Committee. Pensioners are, however, still officials: "post-active" officials, as the Commission puts it. SEPS' essential aim is therefore clear and ambitious: retired staff must be represented fairly, with voting and speaking rights, in the various joint committees and negotiating groups.

Communication

Communication with retired colleagues is very important but can be difficult because retired staff live all over Europe and over 50% of SEPS' members either do not use the internet at all or are uncomfortable with it. It is vital to notify them without delay whenever there are likely to be changes in relation to pensions, the defence of their interests, sickness insurance, dependency insurance, staff policy in general, the organisation of PMO services, decisions of the Court of Justice, and so on.

A SEPS newsletter is published five times a year, in addition to other occasional newsflashes if necessary.

Information meetings are organised five times a year to allow members to discuss and understand the major problems to be solved. These meetings, at which any member may speak, highlight the topics to be dealt with.

Providing help

Another of SEPS' objectives is - as far as possible - to provide assistance and advice to members who ask for help in their dealings with the Administration/PMO. Members can phone SEPS, seven days a week, on: +32 (0)475 472 470 (mobile number).

Partners

SEPS is an active member of the AGE European platform, which brings together over 140 national and international pensioners' organisations in the EU, and which is recognised and supported by the Commission.

12.2.3. Becoming a member

You can become a member of SEPS by completing the application form attached and paying the annual subscription of EUR 30. Membership entitles you:

- to receive the SEPS Bulletin (five times per year) and other newsflashes. The Bulletin aims to provide members with up-to-date information on issues which may be of interest to them (pensions, sickness insurance, new legislation at national or European level, parliamentary questions, judgments of the Court of Justice, etc.).
- to take part in the information and discussion meetings.
- to contact SEPS at any time to ask for information, documents, administrative assistance, etc. (+32 (0)475 472 470).

12.2.4. Contact details

SFPE – SEPS Offices

JL 02 40 CG 39	SC29 02/22
Rue de la Loi/Wetstraat, 175	Rue de la Science, 29
B-1048 BRUSSELS	B-1049 Brussels
Fax: +32 (0)2 281 83 78	Telephone: +32 (0)475
472 470	
E-mail : info@sfpe-seps.be	
Website: www.sfpe-seps.be	

12.2.5. Application form

To obtain a copy of the SEPS membership application form, please contact the numbers above.

For more information...Via My IntraComm...

If you are a pensioner, please replace the first part of each link (<http://myintracomm.ec.europa.eu>) with <https://myintracomm-ext.ec.europa.eu>

For example, for the sliding scale of family allowances:

Link for staff in active employment:

http://myintracomm.ec.europa.eu/hr_admin/en/rights/allowances/Pages/index.aspx

Link for pensioners:

https://myintracomm-ext.ec.europa.eu/hr_admin/en/rights/allowances/Pages/index.aspx

Link for education allowance (pension):

<https://ec.europa.eu/pmo/education-allowances.htm>

Retirement pension:

https://myintracomm.ec.europa.eu/hr_admin/en/pension/retirement/Pages/pmo_n_go.aspx

Invalidity allowance:

https://myintracomm.ec.europa.eu/hr_admin/en/pension/invalidity/Pages/view.aspx

Orphan's pension:

https://myintracomm.ec.europa.eu/hr_admin/en/pension/death-survivors-pensions/Pages/widow.aspx

Severance grant:

https://myintracomm.ec.europa.eu/hr_admin/en/pension/leaving/Pages/View.aspx

Unemployment allowance:

https://myintracomm.ec.europa.eu/hr_admin/en/pension/end-of-contract/Pages/pmo_n_go.aspx

Transfer of pension rights:

http://myintracomm.ec.europa.eu/hr_admin/en/pension/transfer/Pages/index.aspx

Declaration of activities after leaving the Commission (Article 16 of the Staff Regulations):

http://myintracomm.ec.europa.eu/hr_admin/en/ethics/obligations/Pages/after_leaving.aspx

Removals (formalities and forms):

http://myintracomm.ec.europa.eu/hr_admin/en/rights/arrival_departure/Pages/removal.aspx

Application for resettlement allowance:

http://myintracomm.ec.europa.eu/hr_admin/en/rights/arrival_departure/Pages/reinstalment.aspx

Form for declaring travel expenses on termination of service:

http://myintracomm.ec.europa.eu/hr_admin/en/rights/arrival_departure/Pages/travel.aspx

Bank identification form:

http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm

Change of place of origin:

https://myintracomm.ec.europa.eu/hr_admin/en/rights/place-of-origin/Pages/default.aspx

MyIntracomm for retired staff:

<https://myintracomm-ext.ec.europa.eu/retired/en/Pages/index.html>

Or:



PMO Contact

SC27 02/P017

☎ + (32) 2-29.97777

<https://ec.europa.eu/pmo/contact/>

ANNEX - SPECIMEN

Please complete and return to:
PMO-PENSIONS-DECLARATIONS@ec.europa.eu
or
European Commission
PMO/4 - AN 88 4/30

BIENNIAL DECLARATION TO BE RETURNED BY 12-07-2015

Your personal details according to our records (please correct if necessary)	
Pension N°	XXXXXX/AN/IR/INV/SURV
NUP	XX XXXXX XX
Surname	
First name	
Nationality	XX
Date of birth	XX-XX-XXXX
Address (main residence)	
Tel.	+
Mobile	
Email	XX.XXX@XXXX.XX
Changes:	

Your marital status (please correct if necessary)
--

- ☐ Single ☐ Married ☐ In a civil partnership
☐ Separated ☐ Divorced ☐ Widowed

Personal details of your spouse, if applicable (please correct if necessary)	
Surname	
First name	
Date of birth	

[^] Do not fill in the following section if your spouse is a staff member or retired staff member of an EU body.

1. Employment status of your spouse :

- ☐ Retired ☐ Employee/self-employed ☐ Other

Continued over the page

For further information or documentation:
PMO Contact: <https://ec.europa.eu/pmo/contact/>

2. Is your spouse gainfully employed ?

☐ Yes ☐ No

3. Was their most recent annual taxable amount received more than € 30 000 ? If yes, please specify the amount :

Contact persons (other than your household)

Surname :	Surname : .
First name :	First name
Address :	Address : ..
Tel. :	Tel. :
Email :	Email :

Documents to be sent by return of post
--

- o The present document, duly signed
- o Life certificate of the pensioner and, where appropriate, the pensioner's spouse *

* The spouse's life certificate does not have to be filled in if your spouse is a staff member or retired staff member of an EU body.

This declaration, which you must date and sign, must be returned to us no later than 00-00-20XX. If we have not heard from you by that date we will be reluctantly obliged to suspend your pension.

Observations :

Note

Given the possibility of an inspection in the five years following the payment of the entitlements to which this declaration relates, you are required to keep all relevant papers and supporting documents, such as proof of your spouse's income and/or the various invoices justifying the application of the weighting factor if it is greater than 100.

Data protection

This declaration is subject to Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data.

I declare that the information in this document is correct and complete.
--

Done at , on , Signature



EUROPEAN COMMISSION

OFFICE FOR THE ADMINISTRATION AND PAYMENT OF INDIVIDUAL ENTITLEMENTS

PMO.4 – Pensions

The Head of Unit

LIFE CERTIFICATE

I, the undersigned,

attending physician - solicitor - municipal official ,
(cross out as appropriate)

CERTIFY that on the date hereunder I met in person

Mr/Mrs XXXXXX , born on xx/xx/xxxx .

Done at

on

Signature (mandatory)

Stamp (mandatory)