



COST Vademecum

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COST Association AISBL | Avenue Louise 149 | 1050 Brussels, Belgium
T +32 (0)2 533 3800 | F +32 (0)2 533 3890 | office@cost.eu | www.cost.eu



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Version Control	Release Date	Summary of changes
Version 1.0	15 June 2013	N/A - First version released.
Version 1.1	18 May 2015	1. Adding of Montenegro as a COST Member. Minor text adjustments - No rule changes
Version 2.0	13 January 2016	1. Clarification on long distance travel definition (see Section 4.1.3.). 2. Clarification on local transport definition (see Section 4.1.4.). 3. Revision of the local transport rule (see Section 4.1.4.). Minor text adjustments. 4. New URL / web address for submitting STSM applications (see Section 7).
Version 3.0	16 January 2017	1. Terminology changes throughout this document as per revisions of Statutes that entered into force on 14 sept 2016 as well as decisions made by the Committee of Senior Officials (CSO) which came into force on 19 December 2016. 2. Changes to scientific reporting requirements (See Section 1.3). 3. Changes to financial reporting requirements (See Section 2.2.3.) 4. Insertion of provisions on Rejection of expenses (see Section 2.5) 5. Insertion of provisions on a procedure in case of Non-Fulfilment of Contractual Obligations or Mismanagement of Funds (see Section 2.6) 6. Revision of the General Non-Eligible Expenses under the COST Grant System (CGS) (See Section 2.8) 7. Revision of sections concerning reimbursement entitlements to reflect the new category of COST Partner Members (See Section 3, 5 and 7). 8. Individuals from Approved Institutions of International Organisations now eligible to be reimbursed as a Trainer at approved Training Schools (See Section 5). 9. Revision of Local Transport – Shuttle classified as Bus travel and not a Taxi service. 10. Revision of Dissemination Section (See Section 9). 11. Numerous minor text adjustments throughout the document for language optimisation.
Version 4.0	1 May 2017	1. New networking tool added: Conference Grants (See Section 9). 2. Minor text adjustments throughout the document for language optimisation.
Version 4.1	1 Nov. 2017	1. Adding of "ITC" definition and list of country in the Explanation of the terms 2. Minor text adjustments in sections 1.1.2, 4.1.3, 7.4 3. Introduction of electronic signature for the Financial Reports (see section 2.2.3) 4. Update of the section 8.4 in case where the Conference Grant concerns the Chair of the Action 5. Clarification of the rules for dealing with expenses made in the framework of dissemination of your COST Action results and outcomes in the framework of Open Access (section 9.4.5 and 9.4.6)

SCOPE OF THIS DOCUMENT

COST (European Cooperation in Science and Technology – see www.cost.eu), the longest running European framework, is a unique platform where European researchers can jointly develop their ideas and initiatives across all scientific disciplines through the trans-European networking of nationally funded research. It is funded by the European Union (EU) Horizon 2020 Programme whereby the European Commission (EC) has entered into a Framework Partnership Agreement with the COST Association which itself operates under direct instruction from the COST Committee of Senior Officials (CSO) - see “explanation of terms used in this document”.

COST activities are largely arranged as COST Actions. The rules and principles governing all COST activities are established in a series of documents approved by the CSO. These documents can be found on the COST website at <http://www.cost.eu/participate>. The administrative provisions detailed in this document: COST Vademecum direct the implementation of COST Actions and are aligned to the aforementioned rules and principles.

EXPLANATION OF THE TERMS USED THROUGHOUT THIS DOCUMENT

Action Management Committee (Action MC) members	National representatives of each COST Full or Cooperating Member nominated by COST National Coordinators (CNC) to take charge of the coordination, implementation and management of an Action's activities as well as supervising the appropriate allocation and use of the COST funds with a view to achieving the Action's research coordination objectives and capacity building objectives.
Action Chair and Action Vice-Chair	Elected during an Action MC meeting by the Action MC from amongst the Action's MC members. The Action Chair is responsible for the coordination and implementation of the Action. The Action Vice-Chair assists in these activities when requested to do so by the Action Chair and can substitute for the Action Chair when required or mandated to do so.
Action MC Observers	An individual observing at the Action MC a COST Action's coordination and decision-making processes and monitors activities on behalf of his / her institution of affiliation - namely individuals from COST Partner Members, Near Neighbour Countries or International Partner Countries Approved Institutions or Specific Organisations.
Action Memorandum of Understanding (MoU)	The agreement accepted by a minimum of seven different COST Full Members and / or COST Cooperating Member which describes the Action's objectives. This agreement has to be accepted by any COST Full Member and / or COST Cooperating Member who is to join the Action. The MoU contains, in the form of a technical annex, core elements of the proposal submitted in the frame of the Open Call.
Action Participant	Any person being an Action MC member, an Action MC substitute, an Action MC Observer, a Working Group member or an ad-hoc participant.
Approved Institution	Institution located in a COST Near-Neighbour Country (NNC) or International Partner Country (IPC) or a Specific Organisation when applicable which participation to a COST Action has been approved in accordance with the CSO Decision 135/14 establishing the “Rules for Participation of Non-COST countries and Specific Organisations”. Those institutions are referred to as Approved NNC Institution when

	located in a NNC and as Approved IPC Institution when located in an IPC.
Committee of Senior Officials (CSO)	The main decision-making body of COST, responsible for the strategic development of the COST framework. Each COST Full Member can appoint up to two Delegates to the CSO.
COST Action Grant Agreement	The agreement between the COST Association and the Grant Holder that governs the administrative and financial implementation of the COST Action.
COST Cooperating Member	Is any Non-European State as depicted under article 7 of the Statutes of the COST Association that has been admitted to the COST Association as a COST Cooperating Member. The COST Cooperating Member is Israel.
COST Full Member	Is any European State as depicted under article 6 of the Statutes ¹ of the COST Association that has been admitted to the COST Association as a COST Full Member. The 36 COST Full Members are: Austria, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Montenegro, The Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom and the former Yugoslav Republic of Macedonia. The above COST Full Members govern the COST framework via their Delegates in the COST Committee of Senior Officials (CSO) - the General Assembly of the COST Association.
COST Members	The COST Full Members, the COST Cooperating Member(s) and COST Partner Member(s).
COST National Coordinators (CNC)	The individuals appointed by COST Members in charge of confirming the acceptance of the Action's Memorandum of Understanding on behalf of their COST Member and nominating the Action Management Committee members of their COST Member as well as the experts from their COST Member to be part of the pool of Experts for the Review Panels.
COST Near Neighbour Countries (NNC)	States that can benefit from dedicated support that enables participation in COST Action activities. The full list of NNC is as follows: Albania, Algeria, Armenia, Azerbaijan, Belarus, Egypt, Georgia, Jordan, Lebanon, Libya, Moldova, Morocco, the Palestinian Authority, Russia, Syria, Tunisia, and Ukraine.
COST Partner Member	Is any State as depicted under article 8 of the Statutes of the COST Association which has been admitted to the COST Association as a COST

¹ See the COST Statutes at http://www.cost.eu/about_cost/organisation

	Partner Member.
Early Career Investigator (ECI)	An individual who is within a time span of up to 8 years from the date they obtained their PhD/doctorate (full-time equivalent).
EU Institutions, Bodies, Offices and Agencies	Any body so defined in accordance with the Treaties on the European Union and on the Functioning of the European Union established in the EU to accomplish specific tasks of a legal, technical and/or scientific nature in a given policy field and to support the EU member States. A list of the EU bodies, offices or agencies may be found at http://europa.eu/european-union/about-eu/agencies_en
European RTD Organisations	One of 8 European intergovernmental scientific research organisations namely: CERN - European Organization for Nuclear Research, EFDA JET - European Fusion Development Agreement, EMBL - European Molecular Biology Laboratory, ESA - European Space Agency, ESO - European Organisation for Astronomical Research in the Southern Hemisphere, ESRF - European Synchrotron Radiation Facility, European XFEL - European XFEL Free-Electron Laser Facility and ILL - Institut Laue Langevin.
Grant Holder	The legal entity responsible for the administrative and financial implementation of the COST Action.
Inclusiveness Target Countries (ITC)	Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, FYR Macedonia, Hungary, Latvia, Lithuania, Luxembourg, Malta, Montenegro, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Turkey
International Organisation	Any organisation with a European or international membership, scope or presence, with its own legal personality, promoting scientific and technological cooperation and can lend itself to supporting the fulfilment of the COST mission. A non-exhaustive list of the International Organisations may be found in the "Rules for Participation in and implementation of COST Activities".
International Partner Countries (IPC)	States that are neither COST Members nor COST Near Neighbour Countries.
Invited Speakers	Specialists who are not COST Action Participants but can partake in one COST Action meeting and/ or one Training School throughout the lifetime of the COST Action.
Management Committee members and substitutes	National representatives of each COST Full or Cooperating Member nominated by COST National Coordinators (CNC) to take charge of the coordination, implementation and management of an Action's activities as well as supervising the appropriate allocation and use of the COST funds with a view to achieving the Action's research coordination objectives and capacity building objectives.
Participating COST Full, Cooperating or Partner Member	COST Full, Cooperating or Partner Member that has accepted the Action's MoU.

SECTION 1. COST ACTIONS

1.1. COST ACTION OVERVIEW

A COST Action is a science and technology network funded over a four-year duration which requires the participation of at least seven different COST Full Members or Cooperating Members). An Action is organised through a range of networking tools which are performed for the purpose of supporting and ultimately achieving research coordination and capacity building objectives as set out in each Action's Memorandum of Understanding.

1.1.1. FIRST ACTION MANAGEMENT COMMITTEE (ACTION MC) MEETING

The date of the first Action MC meeting of an Action marks the official start date of the Action. The first Action MC meeting is always organised, administered and funded centrally by the COST Association administration. Activities funded centrally by the COST Association are funded under what is known as the COST Centralised Management Funding Scheme. The First Action MC meeting must take place typically within 9 months following the approval of the Action by the CSO.

1.1.2. COST GRANT SYSTEM (CGS)

During the first Management Committee meeting, the Action MC must elect an established legal entity, of which one Action MC Member must hold an affiliation, to manage the COST Action under the tenets of the COST Grant System (CGS). The CGS requires that the elected legal entity, which becomes known as the Grant Holder, will administer the Action Grant by overseeing the financial and administrative management and the various coordination tasks required to successfully support the implementation of approved Action activities.

COST Action activities must be implemented in strict adherence to the terms and conditions contained within the designated COST Action Grant Agreement, signed between the COST Association and the Action Grant Holder. In order to ensure the objectivity and independence of any decision taken by Action stakeholders with respect to how an Action is managed, any potential conflict of interest must be avoided and / or declared to the COST Association in advance of any stakeholder engaging in activities that may represent or give rise to any such conflict of interest.

The COST Grant can only be used to support approved activities necessary for and dedicated to achieving the Action's objectives and / or supporting policies implemented by the CSO.

Exceptionally, it is possible that well-defined Action activities can be administered centrally by the COST Association under the COST Centralised Management Funding Scheme. The COST Centralised Management Funding Scheme can only be considered on an ad-hoc basis and for a limited period only. Action activities operating under the aforementioned scheme always require prior approval from the COST Association.

1.2. COST ACTION PARTICIPATION

1.2.1. COST FULL MEMBER AND COOPERATING MEMBER PARTICIPATION

Individuals whose primary affiliation is with an institution located in a COST Full and / or a COST Cooperating Member can participate in a COST Action as an Action Participant once their respective country has accepted the MoU of the respective Action. Up to 12 months after the date the Action was approved by the CSO, COST Members are free to join the Action. When a period of 12 months has elapsed from the date the CSO approved the Action, the participation of additional COST Members becomes subject to formal approval by the Action MC of the Action.

Subject to Action MC approval, Action Participants can attend approved meetings / Training Schools and partake in Short Term Scientific Missions (STSM) and can be reimbursed in compliance with the eligibility rules detailed in Section 3, 4, 5 and 7 of this document.

1.2.2. COST PARTNER MEMBER PARTICIPATION

Individuals affiliated to universities, research centres, companies or other relevant legal entities located in COST Partner Members may participate in a given COST Action as Action MC Observers (having no voting rights within the MC) if their COST Partner Member has formally accepted the Action Memorandum of Understanding. MC Observers from COST Partner Members cannot be elected as an Action Chair / Vice-Chair / Working Group Leader. Individuals from COST Partner Members source their funding for their participation in COST Activities from national budget and are not eligible to receive funding from the budget afforded to the Action.

1.2.3. NON-COST COUNTRIES PARTICIPATION

Individuals affiliated to universities, research centres, companies or other relevant legal entities located in Non-COST Countries (NNC or IPC) may participate in a COST Action on the basis of ascertained mutual benefit. Individuals affiliated to institutions in Non-COST Countries that have been formally approved onto the Action may be invited by the Action MC as Action MC Observers (having no voting rights within the Action MC). Action MC Observers from Non-COST Countries cannot be elected as an Action Chair / Vice-Chair / Working Group Leader. The rules governing eligibility for the reimbursement of Action Participants from Approved Institutions located in Non-COST Countries are detailed in Section 3, 4, 5 and 7 of this document.

1.2.4. EU COMMISSION, BODIES, OFFICES AND AGENCIES PARTICIPATION

EU Commission, bodies, offices and agencies may nominate representatives to participate as Action MC Observers (with no voting rights within the Action MC). Action MC Observers from EU Commission, bodies, offices and agencies cannot be elected as an Action Chair / Vice-Chair / Working Group Leader and cannot be reimbursed using COST funds unless there are special provisions enacted by the CSO.

1.2.5. EUROPEAN RTD ORGANISATION PARTICIPATION

European RTD Organisations whose participation has been admitted onto a COST Action can nominate representatives to participate as Action MC Observers (having no voting rights within the Action MC). Action MC Observers from European RTD Organisation cannot be elected as an Action Chair / Vice-Chair or as a Working Group Leader. Action MC Observers from Approved European RTD Organisations are eligible for reimbursement in line with the rules detailed in Section 3, 4, 5 and 7 of this document.

1.2.6. INTERNATIONAL ORGANISATION PARTICIPATION

An International Organisation (IO) may participate in a COST Action on the basis of ascertained mutual benefit. Individuals affiliated to IOs that have been formally approved onto the Action may participate in the Action MC as an Action MC Observer (having no voting rights within the Action MC). Action MC Observers from an IO cannot be elected as an Action Chair / Vice-Chair or as a Working Group Leader.

Unless otherwise stated in specific provisions, Action Participants from International Organisations are not eligible for reimbursement, unless there shall be special provisions decided by the CSO.

1.3. COST ACTION SCIENTIFIC REPORTING

1.3.1. ACTION MONITORING AND FINAL ASSESSMENT

The progress and ultimate success of each COST Action will be assessed against the criteria detailed in the Guidelines for Action Management, Monitoring and Assessment (available at: <http://www.cost.eu/participate>). The assessment will be drawn from what is reported and substantiated in three distinct reports that must be submitted by the Action:

- Progress Report 1 due at month 12 of the COST Action, the outcome of which will be taken into account when setting the budget for the following Grant Period;
- Progress Report 2 due at month 24 of the COST Action, the outcome of which will be taken into account when setting the budget for the following Grant Periods.
- Final Report at the end of the Action – typically month 48.

1.3.2. ROLE OF ACTION RAPPORTEUR IN MONITORING AND ASSESSING

An appointed Action Rapporteur will be identified and appointed by the COST Association and will prepare a Progress Review Report after receipt of Progress Report 2 typically just after month 24 of the Action.

An appointed Action Rapporteur will prepare a Final Assessment Report after receipt of the Action's Final Achievement Report at the end of the Action.

1.3.3. SCIENTIFIC REPORTING TEMPLATES

The reports must be prepared using the templates provided by the COST Association which can be found at the COST Action Template Centre on the COST website - see <http://www.cost.eu/participate>.

SECTION 2. COST ACTION MANAGEMENT

2.1. FIRST MANAGEMENT COMMITTEE (ACTION MC) MEETING

The date of the first Action MC meeting of an Action marks the official start date of a COST Action. The first Action MC meeting is organised, administered and funded centrally by the COST Association.

2.1.1. ELECTION OF THE ACTION CHAIR / ACTION VICE-CHAIR / OTHER KEY LEADERSHIP POSITIONS

During the first Action MC meeting of the Action, the Action MC elects an Action Chair and Vice-Chair from amongst its members by means of a simple majority vote. The Action Chair and Vice-Chair must represent two different Participating COST Full Members / COST Cooperating Members.

The Action MC also elects at the first possible opportunity the other key positions required for achievement of the Actions' objectives and the implementation of the networking tools (WG leaders, STSM coordinator ...). One of the key leadership positions in the Action management (Action Chair, Vice-Chair, WG Leader, Grant Holder, STSM Coordinator...) is reserved to a representative of a COST Inclusiveness Target Country (ITC)².

The role of the elected Action Chair has under its remit the following tasks and responsibilities:

1. Coordinate Action activities in line with the objectives defined in the Action MoU and the periodic Work and Budget Plans.
2. Convene and chair Action MC meetings, including preparing the meeting agenda and validating the meeting minutes.
3. Manage requests and the approval procedure of institutions located in Non-COST Countries who want to formally join the Action.
4. Manage the application procedure of COST Members that want to join the Action one year after the date the CSO approved the COST Action has elapsed.
5. Prepare a Work and Budget Plan to be approved by both the Action MC and the Action Science Officer in line with the allocated budget.
6. Seek the approval of the Action MC and the Action Science Officer for significant changes to the approved Work and Budget Plan such as the cancellation of activities and / or the inclusion of additional activities that were not originally included in the approved Work and Budget Plan.
7. Where formal amendments to the approved Work and Budget Plan are necessary, the Action Chair must prepare a revised Work and Budget Plan which has to be formally approved by both the Action MC and the Action Science Officer.
8. Manage Action MC approvals / decisions concerning expenditure (for meetings, Training Schools, Local Organiser Support, Short Term Scientific Missions, Dissemination and Publications) and communicate the outcome of Action MC approvals / decisions to the Grant Manager (see Section 2.2.1.) and to the COST Association.
9. Define and communicate to the Grant Manager, on behalf of the Action MC, a list of all eligible Action Participants who are entitled to be reimbursed for their attendance at approved meetings and Training Schools - this task must be assumed by the Action Vice-Chair when the Action Chair is affiliated to the Grant Holder Institution.
10. Authorise payments (this task must be assumed by the Action Vice-Chair when the Action Chair is affiliated to the Grant Holder Institution).
11. Review, sign and date financial reports - this task must be assumed by the Action Vice-Chair when the Action Chair is affiliated to the Grant Holder Institution.
12. Inform, upon request, the COST Association about key developments within the Action.

² This condition shall only apply to COST Actions derived from Open Call 2017-1 and will apply to all subsequent Open calls.

2.2. COST GRANT SYSTEM (CGS)

Once the first Management Committee meeting has been concluded, the COST Action is from that point on funded and implemented under the tenets of the COST Grant System (CGS).

2.2.1. SELECTION OF THE GRANT HOLDER

The CGS requires that an established legal entity, of which one of the Action MC members must be affiliated to, is selected by the Action MC to oversee the financial management and the various coordination tasks required to successfully support the implementation of approved COST activities. The decision to select the chosen Grant Holder must be recorded in the minutes of the respective Action MC meeting or must be secured by written procedure (which is also known as an e-vote). The result of such e-vote must be also recorded in the minutes of the following Action MC meeting. This selected legal entity becomes known as the Grant Holder. The Grant Holder itself must be a legal entity bound by national, international, public or private law. It cannot be an individual.

When selecting the Grant Holder, the Action MC must take into consideration the following:

1. The administrative capacity of the Grant Holder to successfully implement the Grant (i.e. the ability of the Grant Holder to process reimbursements whilst complying with national / local fiscal rules).
2. The financial stability and medium term viability of the chosen Grant Holder Institution.
3. Any potential conflict of interest that could arise as a result of a proposed institution becoming a Grant Holder.

The COST Association will assess the appropriateness and viability of each proposed Grant Holder institution and may request official statutes and / or a statement of accounts of the given institution prior to the transference of the Grant. Any subsequent evaluation of the Grant Holder's performance by the COST Association may determine that the replacement of a specific Grant Holder is necessary. A change of Grant Holder requires formal approval by both the COST Association and the Action MC. The COST Association reserves the right to unilaterally impose a change of Grant Holder or reject a nominated Grant Holder should there it be deemed necessary to do so in order to ensure the smooth running of a specific Action.

The Grant Holder is comprised of four key positions. Depending on the internal organisation of the Grant Holder, the same person can hold more than one position at a time. The four positions are as follows:

1. **Scientific Representative:** is the Action MC member affiliated to the Grant Holder institution. The Scientific Representative should attend Action MC meetings and must be readily available to support the Action MC in monitoring the overall progress of the Action.

If the Scientific Representative position becomes vacant during an on-going Grant Period and no other Action MC member or Action MC substitute affiliated to the Grant Holder institution is available to assume the position, one of the following two options are possible:

- The COST National Coordinator can nominate another individual who is affiliated to the Grant Holder Institution to become an Action MC member. In this case, the newly nominated individual will become the Scientific Representative.

OR

- The Grant Holder institution can appoint, as a temporary replacement, a member of staff to act as Scientific Representative until the end of the on-going Grant Period. When an individual affiliated to the Grant Holder institution is not nominated as a replacement Action MC member at the end of the on-going Grant Period, a new Grant Holder has to be elected for the subsequent Grant Period by the Action MC in line with the considerations detailed above.

2. **Legal Representative:** is the person from the Grant Holder institution who bears the legal authority to sign the COST Action Grant Agreement (e.g. the Rector of a University).

1. **Financial Representative:** is the person from the Grant Holder institution who has the legal authority to financially commit the institution in question and to validate the expenses listed in financial reports.
2. **Grant Manager:** is the person from the Grant Holder institution who is responsible for overseeing the administrative management of the COST Action and is the primary user, on behalf of the Grant Holder, of the e-COST Action management tool.

2.2.2. GRANT HOLDER TASKS AND RESPONSIBILITIES

Prior to the commencement of the Action's activities, the elected Grant Holder institution will enter into a legally binding contractual agreement called Action Grant Agreement with the COST Association. The Grant Holder will perform and oversee the administrative tasks related to managing and coordinating approved COST Action activities. The Grant Holder must perform these tasks in accordance with best practice financial and administrative standards, the terms and conditions specified in the relevant signed Action Grant Agreement and the rules detailed in the COST Vademecum. If the Grant Holder cannot for any reason fulfil the aforementioned administrative tasks, the COST Association must be informed immediately. Otherwise, the COST Association can consider any significant delays or notable performance failures as non-fulfilment of contractual obligations.

1. Scientific Coordination responsibilities of the Grant Holder

The Grant Holder must support the Action MC with the production of the required scientific reports for the purpose of monitoring and evaluating the progress of the Action (see Section 1.3).

2. Administrative responsibilities of the Grant Holder (Non-exhaustive list)

- Preparation of documentation for meetings under the guidance of the Action Chair / Vice-Chair (e.g. overseeing Action MC approvals, distributing agendas, issuing invitations, drafting minutes and ensuring that all eligible participants sign the relevant attendance lists etc.);
- Coordinating Action meetings funded under the CGS - Please note that if the Grant Manager's participation in the approved activity is purely administrative (meaning that they are not an Action MC member, Action MC substitute, WG member, STSM grantee or trainer / trainee) then the associated expenses must be sourced from the Financial Scientific and Administrative Coordination (FSAC) (see section 2.2.4) and not from the scientific expenditure budget lines, unless the Grant Manager is explicitly working directly on research related activities;
- Collecting and archiving supporting documents related to processing reimbursement claims and the associated payments;
- Archiving all necessary Action MC decisions relating to the Action;
- Must support the Action with the production of its publications and in monitoring the development and maintenance of the Action website.

3. Financial responsibilities of the Grant Holder (Non-exhaustive list):

- Ensure that all payments linked to approved COST Action activities are paid in line with Action MC approvals and eligibility criteria stipulated in the COST Vademecum. With respect to reimbursing Action Participants, the Grant Holder should process reimbursements within 30 calendar days after receiving the claimant's complete claim and never later than 45 calendar days after the end date of the event in question. In cases where advance payments (other than the ones foreseen for Action Participants from ITC see Section 7.4) are requested by Action Participants and / or grantees, the Grant Holder assumes the financial risk associated with doing so. All payments related to COST activities must be finalised and recorded in e-COST only after all the administrative requirements have been satisfied and the payment in question has been wired to the beneficiary or is about to be done;
- Ensure the preparation and delivery of financial reports within the set deadlines.

2.2.3. FINANCIAL REPORTING

For each Grant Period, the following financial reports must be submitted by the Grant Holder:

- Intermediate Financial Report (IFR): the IFR is to be submitted when requesting the second payment, usually around month 8 of the Grant Period. The IFR must be signed electronically on e-COST by the financial or legal representative of the Grant Holder. .
- Final Financial Report (FFR): the validated and signed FFR is to be submitted within 45 calendar days following the terms of the Action Grant Agreement from the end of each Grant Period. The expenses reported in the FFR must contain only finalised and paid claims. The FFR must be electronically signed on e-COST by the Financial / Legal Representative of the Grant Holder, and by the Action Chair (or Vice-Chair if the Action Chair is affiliated to the Grant Holder Institution). . In cases where the late submission of the FFR is evident (submission beyond 45 calendar days after the end date of the Grant Period) the COST Association reserves the right to reject any non-finalised and / or unpaid claims from the given report in accordance with article 2.5 of the present Vademecum. In any case, no changes to the report will be authorised after the validation and subsequent finalisation of the FFR.

The COST Association cannot be held responsible for any erroneously encoded expenses or any type of discrepancy detailed on a submitted financial report. Should the COST Association identify non-eligible or questionable expenses contained within a submitted report, the respective Grant Holder will be duly notified. Such expenses will be removed from e-COST and an updated revised version of the report must be re-submitted to the COST Association for review. When financial reports submitted by the Grant Holder reveal discrepancies that are only identified after the Grant Period has been closed and / or in the event of an audit, the COST Association reserves the right to request the repayment of erroneously claimed funds in accordance with article 2.5 of the present Vademecum.

2.2.4. FINANCIAL SCIENTIFIC AND ADMINISTRATIVE COORDINATION (FSAC)

The Financial, Scientific, Administration and Coordination (FSAC) budget line is a fixed percentage contribution afforded to the Grant Holder to support the execution of the administrative tasks relating to managing and coordinating scientific activities during a given Grant Period. The FSAC percentage, which can represent up to a maximum of 15% of the actual scientific expenditure, is defined in the approved Work and Budget Plan. At the end of each Grant Period, the applicable FSAC amount that can be afforded to the Grant Holder is calculated by applying the Action MC approved FSAC percentage against the eligible scientific expenditure incurred during the respective Grant Period.

When an Amendment to a Grant Agreement is necessary, a possible increase in the FSAC can be considered only if a valid justification is provided. The revised FSAC amount cannot exceed 15% of the amount allocated for scientific activities. The COST Association shall consider each request for an increase in FSAC on a case-by-case basis and will determine whether such an increase is justified and / or necessary.

2.3. ACTION GRANT AGREEMENT AND WORK AND BUDGET PLAN

For each Grant Period, Actions are allocated a fixed budget. This budget represents the maximum financial contribution that will be provided by the COST Association. With this contribution, each Action MC is required to plan, define, agree and approve, in the guise of a Work and Budget Plan, the Action's scientific activities for the given Grant Period. Action funds cannot be directly used for submitting research proposals for the purpose of acquiring funding for national, European or internationally sourced research grants. The approved Work and Budget Plan forms an annex to the Action Grant Agreement. The COST Association and the Grant Holder institution must in kind sign, in covenant, an Action Grant Agreement. Each Grant Period typically lasts 12 months.

A Work and Budget Plan (Annex A to the Grant Agreement) contains the following budget lines:

1. Meetings.
2. Training Schools.
3. Short Term Scientific Missions (STSM).
4. Conference Grant for Early Career Investigators from ITC, hereinafter referred to as Conference Grant.
5. COST Action Dissemination.
6. Other Expenses Related to Scientific Activities (OERSA).

Budget lines 1-6 come under the collective heading: 'science expenditure'. The Action MC can rearrange the budget allocation for approved activities listed under 'science expenditure'.

7. Financial Scientific and Administrative Coordination tasks ((FSAC) - see Section 2.2.4.).

Budget line 7 is a fixed percentage contribution afforded to support Grant Holder's in administering and coordinating the approved scientific activities.

As each Grant Period evolves, the Action Science Officer must be promptly informed by the Action Chair when an approved activity has been cancelled. In addition, approval by the Action's Science Officer is required to authorise the inclusion of additional activities that were not originally foreseen in the initial approved Work and Budget Plan. The additional activity, once approved, becomes part of an adapted Work and Budget Plan which can evolve throughout each Grant Period.

2.3.1. ACTION GRANT AGREEMENT AMENDMENT

An amendment to the Action Grant Agreement is mandatory when:

1. There is a change in the legal status of the Grant Holder.
2. A change to the end date of a Grant Period becomes necessary.
3. A change to the Action's budget for a Grant Period is necessary (following the approval of a revised Work and Budget Plan that has been agreed by both the Action Science Officer and the Action MC).

An amendment to the Action Grant Agreement must be signed by both the COST Association and the Grant Holder before the end date of the Grant Period.

2.4. PAYMENT MODALITIES

Payment requests are linked to the financial reporting requirements specified within the respective Action Grant Agreement. It is essential that each Grant Holder and the respective Action MC take all the necessary measures to meet their reporting requirements in line with the time frames specified in the Action Grant Agreement.

1. For the Action's first Grant Period, a first instalment of 50% of the allocated Grant amount is transferred to the Grant Holder only after the Grant Agreement has been signed by both parties. The payment of first instalments for all subsequent Grant Period's also requires that FFR (see Section 2.2.3) detailing eligible expenses for the preceding Grant Period are validated by the COST Association before the associated transfer of funds can be made. Any underspend from previous Grant Period will be automatically deducted from the amount paid to the Grant Holder for the first instalment of the subsequent Grant Period (see Section 2.4.1).
2. For all Grant Periods, a second instalment of up to 35% of the allocated Grant amount can be made with the following consideration:
 - The request for payment is to be submitted at the same time as the IFR.
3. For all Grant Periods, a third instalment of up to 15% of the allocated Grant amount can be made with the following consideration:
 - The request for payment is to be submitted at the same time as the FFR.

Grant payments are processed by instalments in EUR and can only be paid into the institutional bank account of the Grant Holder. Grant payments cannot be paid into an individual's private bank account. Bank and / or currency related charges / fees imposed by the bank of the Grant Holder institution when receiving Grant payments from the COST Association are not eligible to be claimed under the COST Grant System. These expenses must be borne by each respective Grant Holder institution.

2.4.1. RETURNING UNSPENT FUNDS

The COST Association reserves the right to reclaim or retain funds from the Grant Holder when:

1. There is an under-spend at the end of the last Grant Period of the Action.
2. There is an under-spend at the end of a Grant Period and a change of Grant Holder is required.
3. The non-fulfilment of the Grant Holder's contractual obligations and / or the non-performance of their tasks and responsibilities are discernible (see Section 2.6).

In any of the aforementioned scenarios, the Grant Holder has to provide the COST Association with a finalised FFR in order to bring the respective Grant Period to a close. When the FFR has been validated by the COST Association and an under-spend is evident, the COST Association will either automatically deduct the under-spend amount from the amount to be paid to the Grant Holder for the first instalment of the subsequent Grant Period (see Section 2.4) or request the repayment of the unspent funds.

2.5. REJECTION OF EXPENSES

The COST Association shall – at the time of the IFR, the FFR or afterwards – reject any expenses which are non-eligible in accordance with the present Vademecum, in particular following checks, reviews, audits or investigations. Non-eligible cost shall be rejected in full, except for the lump sum expenses which shall be rejected proportionally to the task or part of the related activity not implemented. The Grant Holder shall be duly notified of such rejection.

If the COST Association rejects expenses at the time of the IFR or FFR, it will deduct them from the eligible costs declared in the IFR or FFR and reduce the second or third instalment accordingly. If the COST Association rejects expenses after FFR, it will deduct them from the amount to be paid to the Grant Holder for one of the instalments of one of the subsequent Grant Periods or request the repayment of the unspent funds.

2.6. NON-FULFILMENT OF CONTRACTUAL OBLIGATIONS OR MISMANAGEMENT OF FUNDS

Mismanagement of the allocated funds, non-fulfilment of the Grant Holder's contractual obligations and the non-performance of the tasks and responsibilities expected of the Grant Holder may lead to one or all of the following scenarios:

1. The suspension of all pending and / or future payments and the recovery of the amounts already paid.
2. The suspension or cancellation of the Action Grant Agreement.
3. The selection of a replacement Grant Holder.
4. The reduction or complete cancellation of the contribution to the Financial and Scientific Administration and Coordination (FSAC) costs mentioned in Section 2.2.4.

Before taking any of the above-mentioned measures, the COST Association will formally notify the Grant Holder:

- of its intention to adopt one of the above-mentioned measures;
- to submit observations within 30 calendar days of receiving notification.

If the COST Association does not receive observations or decides to pursue the above steps despite the observations it has received, it will formally notify confirmation of the measure, Otherwise, it will formally notify that the procedure is not continued.

The suspension of payments or of the Action Grant Agreement will take effect the day the confirmation notification is sent by the COST Association. If the conditions for resuming payments are met, the suspension will be lifted. The COST Association will notify the Grant Holder accordingly.

The cancellation of the Action Grant Agreement will take effect the day the confirmation notification is sent by the COST Association. Cancellation of the Action Grant Agreement will lead to the selection of a replacement Grant Holder.

The selection of a replacement Grant Holder will be preceded by a measure of suspension or cancellation of the Action Grant Agreement and be reported to the Action MC in view of the selection of a new Grant Holder.

The reduction or complete cancellation of the Financial and Scientific Administration and Coordination (FSAC) will take effect the day the confirmation notification is sent by the COST Association.

2.7. E-COST AND STRONG AUTHENTICATION

It is compulsory that all Grant Holders use the online Action management tool: e-COST – see <https://e-services.cost.eu>.

e-COST is a technical platform that enables participants to submit their reimbursement claims electronically and as such enables Grant Holders to monitor the participation status of invitees / attendees for any given activity. e-COST also provides a 'real time' budgetary overview of any activity that has been encoded and actioned on the platform.

Any Grant Holder can simplify the online e-COST based reimbursement procedure by using the 'Strong Authentication' feature. This feature is applicable to all types of meetings and requires users to register 'one time passwords' similar to the additional security layers found on many online banking facilities. Once registered, eligible participants can complete and submit their 'Online Travel Reimbursement Request' (OTRR) forms and the relevant supporting documentation entirely online. This removes the requirement of eligible participant to physically print out and sign their OTRR forms by hand and for them to send their OTRR forms (and supporting documentation) to their Grant Holder by post.

The Strong Authentication feature is activated by default on e-cost, unless otherwise requested by the Grant Holder.

Once the Strong Authentication feature functionality has been activated, participants will be prompted to complete the Strong Authentication online registration procedure when they access their invitation email for the ensuing meeting. On finalising the registration procedure, each eligible participant will then be able to complete the reimbursement procedure entirely online.

The original invoices / receipts / supporting documents must be kept by each claimant up to the end date of the audit timeframe indicated on the Grant Agreement signed between the COST Association

and the Grant Holder. All Grant Holders managing Actions that opt for the Strong Authentication feature must archive legible copies (electronic copies will suffice) of all OTRRs and of all of the supporting documentation (including Action MC approvals) related to meetings up to the end date of the respective audit timeframe.

Grant Holders choosing not to opt for the Strong Authentication feature must archive original (signed by hand) OTRR forms submitted by all participants along with legible copies (electronic copies will suffice) of all supporting documentation (including Action MC approvals) related to meetings up to the end date of the audit timeframe that is indicated on the Action Grant Agreement signed between the COST Association and the Grant Holder.

2.8. OTHER EXPENSES RELATED TO SCIENTIFIC ACTIVITIES

'Other Expenses Related to Scientific Activities' (OERSA) are currency related bank fees or charges incurred by the Grant Holder when processing the payment of eligible expenses to beneficiaries. These fees must be evidenced by proof of payment showing the nature of the expenses and the amounts that have been incurred.

Bank and / or currency related charges / fees charged by the bank of the Grant Holder institution when receiving Grant payments from the COST Association are not eligible to be claimed under the COST Grant System. These expenses must be borne by each respective Grant Holder institution.

Bank and / or currency related charges / fees charged by the bank of individual claimants and / or beneficiaries who have received a payment sourced from the COST Grant are not eligible to be claimed by the beneficiary and must be borne by each respective individual beneficiary.

In exceptional circumstances, an Action may need to undertake activities that are outside the remit of the eligible expenses detailed in this document. In such cases, expenses can be claimed and classified under the OERSA category but only after explicit approval is authorised by the COST Association and before any such expense has been incurred.

2.9. GENERAL NON-ELIGIBLE EXPENSES UNDER THE COST GRANT SYSTEM (CGS)

1. V.A.T. is not to be considered as being a charge or a fee under the CGS irrespective of whether the Grant Holder institution is subject to pay V.A.T. or not. V.A.T. cannot be claimed nor can it be reimbursed and must be paid using sources other than COST funds.
2. Taxes normally due or applicable with respect to the reimbursement of flat rate allowances and / or the payment of fixed Grants are not to be deducted from amounts payable to beneficiaries. It is the responsibility of each beneficiary to ensure that all amounts that they receive from COST are compliant with their national tax rules and obligations.
3. Provisions for possible future losses or charges and / or for doubtful debt.
4. Expenses related to interest or duties.
5. Unnecessary or ill-considered expenses.
6. Expenses already paid for and / or those already reimbursed from other sources.
7. Exchange rate losses.
8. Expenses linked to activities that do not have a clear and recognisable association with supporting approved COST Action activities.
9. Bank and / or currency related charges / fees imposed by the bank of the Grant Holder institution when receiving Grant payments from the COST Association.
10. Bank and / or currency related charges / fees charged by the bank of individual claimants / beneficiaries who have received a payment from the Grant Holder institution / COST Association.

Grant Holder's must consult the COST Association when there is doubt about the eligibility of any expense or activity being supported or funded under the COST Grant System.

SECTION 3. MEETING TYPES AND ELIGIBILITY

COST supports different categories of meetings as part of its “meetings” networking tool. The following considerations must be respected in all cases:

1. All activities must be approved by the Action MC and by the Action Science Officer. The Action Chair must acquire approval of the Action MC and the Action Science Officer for changes to the approved Work and Budget Plan such as the cancellation of activities and / or the inclusion of new additional activities not originally included in the approved Work and Budget Plan.
2. COST meetings, workshops and conferences must be held for the sole purpose of supporting the Action’s scientific and networking activities in line with the objectives specified in both the Action’s MoU and the approved Work and Budget Plans. In its role as organiser or co-organiser, the COST Action must be fully integrated into the scientific programme of the respective event / activity and must have direct involvement in the general organisation of the event. COST must be visible as an organiser or co-organiser on the event’s specific website and its promotional materials.
3. For co-located meetings (co-located being multiple COST meetings being held over the same time period in the same venue / city), a limit of four Invited Speakers applies to the combined series of meetings. Only one ‘Local Organiser Support’ claim can be afforded to support the entire series of co-located meetings with the COST contribution never exceeding EUR 10 000.
4. The Action MC must determine from amongst eligible participants those who are entitled to be reimbursed. The Action Chair (or Vice-Chair if the Action Chair is affiliated to the Grant Holder institution) can assume this responsibility if the Action MC formally gives them the mandate to act on their behalf.
5. All categories of meetings (except Dissemination meetings – see Section 3.3) must be held in a Participating COST Full member / COST Cooperating member.
6. All beneficiaries in receipt of a reimbursement for eligible travel, accommodation and meals expenses which are sourced from COST funds must sign the attendance list on each day that they attend the COST event. Please note that this requirement is not applicable to the Dissemination meetings category - see Section 3.3.

3.1. ACTION MANAGEMENT COMMITTEE (ACTION MC) MEETINGS

The Action Management Committee is comprised of up to two Action MC members from Participating COST Full members / COST Cooperating members. Action MC members are nominated by their respective COST National Coordinator (CNC). The CNC can also nominate Action MC substitutes (up to three) to replace Action MC members at Action MC meetings. An Action MC member should always inform their Action Chair and the Action Grant Holder that their officially nominated Action MC substitute will be replacing them at any given Action MC meeting.

3.1.1. ROLE OF THE ACTION MC WITHIN THE ACTION

The purpose of an Action MC meeting is to coordinate and organise the Action’s scientific and networking activities in line with the objectives specified in both the Action’s MoU and the approved Work and Budget Plans. Budgetary and strategic decisions linked to the management of a COST Action must adhere to the opinions and requests of the majority of the Action MC. Acquiring agreement within the Action MC with respect to the management and implementation of Action activities qualifies as Action MC approval.

There are two procedures that the Action MC can follow to acquire Action MC approval:

1. Simple majority vote at an Action MC meeting - decisions at Action MC meetings by majority vote may only be made if at least two-thirds of Participating COST Full Members and COST Cooperating Members are present and have their vote recorded - each Participating COST Full Member / COST Cooperating Member has one vote. Decisions taken by majority vote at Action MC meetings must be recorded in the minutes of the given meeting. The minutes recording the decisions must be filed with the documents that are relevant to why the Action MC approval was originally sought. Minutes of Action MC meetings must be communicated to the Action MC, the COST Association and uploaded onto the e-COST platform.

Or

2. The Action MC can also take decisions by means of a 'written procedure' which involves the Action Chair sending a communication, by email, detailing the need for Action MC approval to the entire Action MC or its 'Steering Group / Core Group' (subject to the Steering Group / Core Group having the formal mandate to make decisions on behalf of the Action MC) and must specify a date (of at least 7 calendar days) up to which any Action MC member or Core Group member can contest their disapproval for implementing the proposed change. This 'written procedure' is commonly known as an "e-vote" and operates on the premise of presumed consent which means that if Action MC members do not respond directly to the respective notifications within at set time frame (of at least 7 calendar days), then the Action Chair and Grant Holder can assume that the Action MC are in agreement with the decision and can consider the resultant changes as being Action MC approved. If the majority of Action MC members oppose the proposed changes then the intended change may not be adopted. The email used to secure Action MC approval by 'written procedure' must be filed with the documents that are relevant to why the Action MC approval was originally sought and must be uploaded onto the e-COST platform. The COST Association must be informed of the outcome of the decision. The outcome of the vote must be included in the minutes of the subsequent Action MC meeting.

It is recommended that Action MC meetings should be held in conjunction with another approved Action activity (e.g. WG meetings, Workshops / Conferences) to consolidate travel expenses. COST Association representatives and all Action MC members are automatically invited to attend Action MC meetings. There must be no more than three Action MC meetings per Grant Period and each Action MC meeting must not last more than one full day.

3.1.2. PARTICIPANTS ELIGIBLE TO BE REIMBURSED FOR THEIR ATTENDANCE AT ACTION MC MEETINGS

1. Up to 2 Action MC members (or their substitutes) from each Participating COST Full Member / COST Cooperating Member are eligible to be reimbursed for their attendance at Action MC meetings. Each Action MC member can only be replaced by an officially nominated substitute.
2. Action MC Observers from Approved Near Neighbour Country (NNC) Institutions - limited to one representative from each Approved NNC institution and up to a maximum of two representatives from each NNC.
3. Action MC Observers from Approved European RTD Organisations limited to one representative from each approved Organisation.
4. Working Group leaders located in Participating COST Full Members / COST Cooperating Members for the exceptional cases where Working Group leaders are not Action MC members nor are they Action MC substitutes.

3.1.3. PARTICIPANTS NOT ELIGIBLE TO BE REIMBURSED FOR THEIR ATTENDANCE AT ACTION MC MEETINGS

1. Action MC Observers from COST Partner Members, Approved IPC Institutions, Approved International Organisations (IO) and EU Commission, bodies, offices and agencies.
2. Any other participant not specifically mentioned as being eligible.

3.2. ALL OTHER CATEGORIES OF MEETINGS (EXCLUDING DISSEMINATION MEETINGS)

All other types of approved meetings, excluding Dissemination meetings, focus their work on achieving the research coordination and capacity-building objectives of an Action in line with those objectives set out in the Action's MoU.

3.2.1. PARTICIPANTS ELIGIBLE TO BE REIMBURSED FOR OTHER TYPES OF MEETINGS

1. Action Participants from Participating COST Full Members / COST Cooperating Members.
2. Action Participants from Approved NNC Institutions.
3. Action Participants from Approved European RTD Organisations.
4. Up to four Invited Speakers whose primary affiliation is with an institution located in a non-Participating COST Full Member / COST Cooperating Member (which also includes COST Full Members / COST Cooperating Members listed as being under intention and / or individuals who have not yet obtained Action MC approval to participate in a given Action), individuals in non-approved NNC institutions and individuals located in non-approved IPC institutions.

Invited Speakers are specialists who are not Action Participants but can partake in one COST Action meeting throughout the lifetime of the Action. Repeated participation of the same Invited Speakers for meetings cannot be funded under the COST Grant. Invited Speakers must be invited, and listed, as a speaker on the programme / agenda of the relevant Action meeting.

3.2.2. PARTICIPANTS NOT ELIGIBLE TO BE REIMBURSED FOR OTHER TYPES OF MEETINGS

1. Action MC Observers from COST Partner Members, Approved IPC Institutions, Approved IO and EU Commission, bodies, offices and agencies.
2. Any other participant not specifically mentioned as being eligible.

3.3. DISSEMINATION MEETINGS

Dissemination meetings are high profile events or conferences not specifically organised by the COST Action. Preferably, Action MC members or their substitutes should attend these meetings for the purpose of disseminating their Action's achievements. The following conditions apply to this meeting type:

1. The participation of eligible participants at Dissemination meetings must be pre-approved by both the Action MC and by the Action's Science Officer. Attendance at European conferences is preferred. However, conferences held elsewhere can also be considered.
2. For each Grant Period, a maximum of two Action MC members or their substitutes are eligible to be reimbursed for their attendance at approved Dissemination meetings. Repeated attendance at Dissemination meetings by the same Action MC members or Action MC substitutes across Grant Periods should be avoided.
3. All eligible Action Participants must make an oral presentation at the conference in question and must be listed as a speaker in the official event/conference programme. The main subject of the oral presentation / speech at the approved event or conference must result in promoting the scientific activities being performed by the COST Action.
4. Eligible participants may receive financial support for their travel, accommodation and meal expenses in line with the eligibility rules detailed in Section 4.
5. In addition to the provisions specified in point 4 (see above), a contribution of up to a maximum of EUR 500 can be claimed for conference fees incurred by eligible participants. When meal and accommodation expenses are supported by the hosting institution as part of the provisions offered in their conference package, the accommodation and meal allowances afforded to each eligible participant must be deducted from each claim accordingly. The reimbursement of a conference fee requires a claimant to submit supporting documentation evidencing that the amount in question was incurred.

3.3.1. PARTICIPANTS ELIGIBLE TO BE REIMBURSED

Action MC members or Action MC substitutes from Participating COST Full Members / COST Cooperating Members.

3.3.2. PARTICIPANTS NOT ELIGIBLE TO BE REIMBURSED

1. Individuals located in institutions in non-Participating COST Full Members / COST Cooperating Members (which includes those individuals located in COST Full Members / COST Cooperating Members listed as being under intention or those individuals in COST Full Members / COST Cooperating Members which have not yet obtained Action MC approval to participate in the Action).
2. Action MC Observers from COST Partner Members, Approved IPC Institutions, Approved IO, EU Commission, bodies, offices and agencies and Approved European RTD Organisations.
3. Any other participant not specifically mentioned as being eligible.

SECTION 4. MEETINGS – FINANCIAL SUPPORT

The Action MC must determine from amongst eligible participants those who are entitled to be reimbursed. The Action Chair (or Vice-Chair if the Action Chair is affiliated to the Grant Holder institution) can assume this responsibility if the Action MC formally gives them the mandate to act on their behalf. Eligible Participants that are entitled to be reimbursed can receive financial support for their travel, accommodation and meal expenses in line with the eligible expenses detailed in Section 4.1.

The organisational expenses linked to hosting an approved meeting can be claimed under the ‘Local Organiser Support’ mechanism (see Section 6: Local Organiser Support).

Meeting participants eligible to be reimbursed should:

1. Choose the most economical means of transportation.
2. Make their transportation arrangements as early as possible upon receipt of their official invitation to the approved activity.

In order for eligible participants to be reimbursed they must:

1. Register for an e-COST profile at <https://e-services.cost.eu> - each participant must also add their bank details to their e-COST profile.
2. Sign the attendance list on each day that they attend the meeting. Please note that this requirement is not applicable to the Dissemination meetings category - see Section 3.3.
3. Declare via e-COST when submitting their Online Travel Reimbursement Request (OTRR) that they will not receive a reimbursement or an allowance from a third party to support their attendance at the approved COST activity for where they are submitting a claim - double funding is not permitted. The COST Association reserves the right to contact any beneficiary of COST funds and / or their institution or any other relevant third party when double funding is suspected.
4. Submit to their Grant Holder, a completed OTRR within 30 calendar days after the end date of the approved activity.
5. Upload legible copies of all invoices / receipts and relevant supporting documents onto e-COST.

All payments made to eligible participants are in Euro at an exchange rate automatically calculated by e-COST which uses the conversion rate applicable at the end date of the meeting in question. Bank charges / fees incurred by a Grant Holder in relation to returned or rejected payments due to incorrect bank account details being provided by a beneficiary of COST funds can be subtracted from the payable amounts. When receiving a payment sourced from COST, bank charges / fees charged by banks are not eligible to be claimed by the beneficiary and must be borne by each respective individual beneficiary.

Using Strong Authentication:

- Each Grant Holder must archive legible copies (electronic copies will also suffice) of all OTRRs and of all of the supporting documentation (including Action MC approvals) related to meetings up to the end date of the audit timeframe as indicated on the respective Action Grant Agreement signed between the COST Association and the Grant Holder.
- Each claimant must archive the original invoices / receipts until the end date of the audit timeframe as indicated on the respective Grant Agreement signed between the COST Association and the Grant Holder.

4.1. ELIGIBLE EXPENSES

4.1.1. ACCOMMODATION EXPENSES (WHICH ALSO COVERS BREAKFAST EXPENSES)

When claiming for accommodation expenses the following conditions apply:

1. The reimbursement of incurred accommodation expenses is paid as a flat rate for a set amount of up to a maximum of EUR 120 per person per night. This set amount includes a provision to cover breakfast expenses. No invoices issued from accommodation providers are required. The Action MC may decide to apply a reduced ceiling on the applied flat rate for accommodation expenses. In such cases, all participants must be notified of the revised flat rates before or when receiving their formal invitations via e-COST. The same accommodation flat rate amount must be afforded to all eligible participants attending a given event.
2. The maximum number of nights that can be claimed for by an eligible participant is calculated against the actual number of days the participant attends the approved activity (as confirmed against their signature on the official attendance list for each day of the event that they attend), plus 1 night, permitting, if applicable, the participant to arrive at the vicinity of the event on the day before the activity commences.
3. Accommodation expenses must be paid for by each individual participant.
4. When an eligible participant shares their hotel room with another eligible participant, then only one participant can submit a claim for their accommodation expenses.
5. An eligible participant residing in the same city as where the approved activity is being held should not claim for accommodation expenses.
6. Requests for extra night's accommodation must be approved by the COST Association prior to any related expense being paid to a participant.

4.1.2. MEAL EXPENSES

When claiming for meal expenses the following conditions apply:

1. Meal expenses are reimbursed against flat rates only (at a maximum of EUR 20 per meal). No invoices or receipts from the meal providers are required. The Action MC may decide to apply a reduced ceiling on the applied flat rate for meal expenses. In such cases, all participants must be notified of the revised flat rates before or when receiving their formal invitations via e-COST. The same meal flat rate amount must be afforded to all participants.
2. A maximum of up to two meals per day are eligible (two meals strictly concern lunch and dinner provisions - breakfast expenses are not an eligible expense – see Section 4.1.1.).
3. Meals provided from other sources including the Local Organiser must be deducted from the number of eligible meals that can be afforded to a participant.
4. Requests for extra meals must be approved by the COST Association prior to any related expense being paid to a participant.

4.1.3. LONG DISTANCE (CROSS-BORDER) TRAVEL EXPENSES

Long distance travel is when an eligible participant travels across national borders from the country where they are residing (as registered on their e-COST profile) directly to where the approved COST meeting is being held and back to the country where they are residing. Each eligible participant is entitled to claim for travel expenses in line with the conditions detailed in this section irrespective of the dates of travel.

The following conditions apply to the different modes of permissible long distance travel options as listed below:

1. Air travel expenses
 - Air travel is always classified as being long distance travel, including domestic flights;
 - The supporting documents provided by the eligible participant must clearly detail the name of the service provider, the mode of transport taken, the full price of the ticket, the name of the passenger, the travel dates, departure and arrival times and the booking class (an invoice only showing the amount will not suffice);

- Only economy class tickets are eligible to be reimbursed;
- Air fares cannot exceed EUR 1 200. Air fares that exceed EUR 1201 require explicit approval from the COST Association prior to the event taking place and before the ticket is purchased by the eligible participant;
- Seat reservations and luggage transportation expenses are eligible to be reimbursed;
- Administrative fees charged by travel agencies are eligible to be reimbursed.

2. Long distance Train or Bus travel expenses

An eligible participant travelling by train or bus crossing national borders from the country where they are residing (as registered on their e-COST profile) to the country where the approved COST meeting is being held and back again must comply with the following considerations:

- The supporting documents provided by eligible participants must clearly detail the name of the service provider, the mode of the transport taken, the full price of the ticket and the date of travel;
- First, second and business class tickets are eligible to be reimbursed;
- Supplements for fast trains and sleeper trains are eligible to be reimbursed.

3. Long distance Car travel expenses

An eligible participant travelling by car crossing national borders from the country where they are residing (as registered on their e-COST profile) to the country where the approved COST meeting is being held and back again must respect the following criteria:

- Car travel is limited to a maximum distance of 2 000 km for the entire journey;
- Car travel can be reimbursed at EUR 0.20 per km, when one eligible participant is travelling;
- Car travel can be reimbursed at EUR 0.30 per km, when additional participants who are also eligible to be reimbursed are travelling in the same vehicle. Only the driver can be reimbursed. The names of the other eligible passengers must be mentioned on the remarks section of the OTRR submitted by the driver;
- Submission of a proof of distance travelled by means of a print out from a reputable online route planner (e.g. Google maps) showing the route taken and the kilometres travelled;
- Parking expenses are eligible to be reimbursed based on the submission of receipts / invoices and can only cover the time period relevant to the approved activity (parking expenses can be claimed under Local transport expenses – Parking expenses, see Section 4.1.4.);
- Additional accommodation expenses, fuel expenses, tolls charges and car rental expenses are not eligible to be reimbursed.

4. Long distance Ferry travel expenses

An eligible participant travelling by ferry from the country where they are residing (as registered on their e-COST profile) to the country where the approved COST meeting is being held and back again can be reimbursed. Supporting documents provided by eligible participants must clearly detail the name of the service provider, the mode of the transport, the full price of the ticket and the date of travel.

5. Travel derogations

Travelling to and from countries other than that where the approved meeting is being held and the country where the eligible individuals is residing (as registered on their e-COST profile) is a rule derogation and must be explained and detailed by the participant on the relevant claims section on e-COST. When this type of rule derogation is evident, the participant in question must submit an OTRR containing a written justification which must be accompanied with the following:

- The full travel itinerary and the invoice / receipt for the actual ticket that was purchased along with all of their other supporting documents;
- Comparative quotes sourced from a print-out from a reputable online travel search engine (Skyscanner, Expedia, Opodo etc.) listing the most economical means of travel close to the dates of the meeting for the expectant journey (the expectant journey being as if the participant travelled from the country where they are residing (as registered on their e-COST profile) to the country where the approved activity is being held and back again). The quotes shall be generated at least one month before the start date of the meeting. The quotes must show travel prices of the same mode of transport that was actually travelled. Participant can never be reimbursed for more than

the cheapest means of travel substantiated on the submitted comparative quotes and never more than the amount that was actually paid for the travel ticket in question. The lower of the two amounts determines the maximum sum that can be reimbursed to the claimant.

4.1.4. LOCAL TRANSPORT EXPENSES

Local transport is when an eligible participant uses travel options that start and finish within one country's national borders - specifically not travelling across national borders.

The following conditions apply to the different modes of permissible local transport options:

1. Public transport expenses

Public transport expenses cover bus, shuttle, train, metro and tram travel within one country. The reimbursement rules for public transport are as follows:

- If the amount claimed for the entire journey is equal to or less than EUR 25, then no supporting documents are required. In any case, the details of the relevant journey(s) must be detailed on the OTRR (for both the outbound and inbound journeys);
- If the amount claimed for the entire journey is more than EUR 25, then supporting documents justifying the total amount claimed must be provided by the participant. All submitted invoices / receipts must clearly detail the name of the service provider, the full price of the ticket and the date of travel. All segments of the journey must be detailed on the claimants OTRR.

2. Taxi expenses

An eligible participant is permitted to claim taxi expenses in the following instances:

- When public transport is not available;
- If taxis are taken before 7 am to facilitate an early departure and / or if a taxi is taken after 10 pm due to a late arrival.

Taxi expenses up to a maximum of EUR 80 for the entire journey can be claimed by eligible participants if either of the above criteria have been respected. A justification must be encoded in the dedicated space on the OTRR. Taxi expenses can only be paid against the amounts detailed on taxi receipts. Taxi receipts must clearly detail the name of the service provider, the full price of the journey and the date of travel. Tips are not eligible for reimbursement.

3. Local Car travel expenses

An eligible participant travelling by car within one country - specifically not travelling across national borders can be reimbursed in line with the criteria detailed in Section 4.1.3. - Car travel.

4. Parking expenses

Parking expenses are eligible to be reimbursed against the submission of receipts / invoices. An eligible participant can only claim for parking expenses incurred for the timeframe that coincides with the approved activity.

5. Local Ferry expenses

An eligible participant travelling by ferry for travel starting and finishing within one country's territorial waters can claim for local ferry expenses. The submitted invoice / receipt must clearly detail the name of the service provider, the full price of the ticket and the date of travel.

For all permissible modes of transport, as detailed in Section 4.1.3. and Section 4.1.4. (excluding tickets related to air travel whereby the name of the passenger is always required), it is understood that in certain instances, expenses such as taxi receipts and certain train / bus / metro / tram / ferry tickets will not contain the name of the passenger (s) and / or the full travel itinerary. In such cases, the supporting documents provided by the eligible participant must clearly detail the name of the service provider, the mode of transport taken, the full price of the ticket and the date of travel.

4.1.5. OTHER TRAVEL EXPENSES

1. Visa expenses

Visa fees relevant to attending approved COST meetings are eligible to be reimbursed. All eligible claimants must validate the incurred amount by producing supporting documents such as a receipt / stamp from the embassy / consulate issuing the visa which clearly shows the amount paid and the conditions of the acquired visa. The COST Association and the Action Grant Holder cannot be held responsible in cases where individuals do not secure the necessary travel documents / visas needed to facilitate their participation in approved COST activities. In such instances, the individual in question will not be entitled to be reimbursed for any incurred expenses.

2. Expenses that give rise to rule derogations caused by medical illness and / or Force Majeure

If an eligible participant (or a first degree relative of an eligible participant) suffers from a medical illness or if an eligible participant encounters a case of Force Majeure (e.g. a strike, terrorist incident or natural disaster) and, as a result, there is an expressed need to cancel / change travel ticket (s) and / or hotel reservation (s), then non-refundable amounts or additional expenses can be considered as being eligible for reimbursement. The non-refundable amounts or additional expenses linked to the above must always be calculated against the face value of the incurred travel, accommodation and meal expenses (face value being the amounts evidenced on submitted receipts / invoices). The maximum thresholds governing eligible travel expenses (see Section 4.1.3., 4.1.4. and 4.1.5.) must be respected. Extra accommodation and meal expenses being claimed due to medical illness / Force Majeure can never exceed the Action MC agreed set flat rate amounts for the given activity.

Each eligible participant claiming expenses linked to medical illness / Force Majeure must submit a completed, signed and dated OTRR, all of the relevant invoices and receipts and if applicable, a statement from the respective service provider (s) (airline company, hotel etc.) detailing the non-refundable amounts. Claimants must also always submit to their Grant Holder, written documentary evidence justifying their claim – i.e. submitting a medical certificate in cases related to medical illness or a statement from the airline company / service provider in cases linked to Force Majeure substantiating the nature of the Force Majeure. The Grant Holder must in turn submit all supporting documentation provided by the participant to the COST Association for formal approval prior to the respective claim being paid to the participant.

The COST Association considers each derogation request linked to medical illness and Force Majeure on a case-by-case basis and reserves the right to reject any such request.

4.2. MEETINGS: NON-ELIGIBLE EXPENSES

1. Conference / registration fees (excluding Dissemination meetings – see Section 3.3.).
2. Lecture fees and honoraria.
3. Accommodation, transportation / postage expenses associated with obtaining visas.
4. Life, travel and medical insurance – Expenses related to addressing / treating health issues.
5. Travel cancellation insurance and luggage insurance.
6. Fees, charges and/or penalties linked to a participant changing or having to rebook travel tickets.
7. Additional accommodation expenses, fuel expenses, toll charges and car rental expenses linked to car travel.
8. Wi-Fi, telephone, internet, laundry and mini-bar consumption expenses.
9. Printing and postage expenses.
10. Regional and / or national taxation fees; stamp duty expenses.

SECTION 5. TRAINING SCHOOLS

Training Schools will provide intensive training in emerging research topics within the laboratories and organisations involved in the Action.

5.1. TRAINING SCHOOLS – ELIGIBILITY RULES

COST supports the participation of two categories of participants for their attendance at approved Training Schools:

1. **Trainers** can be reimbursed for their travel, accommodation and meal expenses in line with the eligibility rules specified in Section 4. Lecture fees and / or any form of honoraria for Trainers are not eligible.
2. **Trainees** are entitled to receive a fixed Grant in line with the considerations specified in Section 5.3.

The organisational expenses linked to hosting a Training School can be claimed under the ‘Local Organiser Support’ mechanism (see Section 6: Local Organiser Support).

The following considerations must be respected when organising a Training School:

1. The Action MC must define from amongst eligible participants those trainers who are to be reimbursed. The Action MC must also define the financial contribution (in the form of a Trainee Grant) for each eligible Trainee who will be attending the approved Training School. The Action MC can delegate the pre-mentioned tasks to the Action Chair (or Vice-Chair if the Action Chair is affiliated to the Grant Holder Institution).
2. A Training School must have COST Action objectives as its main focus. The COST Action also has to be one of the primary organisers of the Training School and must be clearly promoted on all dissemination channels, namely the official website of the Action / event, brochures and all relevant training material.
3. A Training School must be held in a Participating COST Full Member / COST Cooperating Member or in an Approved NNC institution.
4. There should be a reasonable country balance concerning trainee participation.
5. All attendees (both trainers and trainees) at approved Training Schools must sign the meeting attendance list on each day that they attend the event.
6. All attendees must also register for an e-COST profile at <https://e-services.cost.eu> - each participant must add their bank details to their e-COST profile prior to receiving their e-COST invitation.

Trainers eligible to be reimbursed:

1. Trainers from Participating COST Full Members / COST Cooperating Members.
2. Trainers from Participating COST Partner Members.
3. Trainers from Approved NNC institutions.
4. Trainers from Approved IPC institutions.
5. Trainers from Approved International Organisations (IO).
6. Trainers from Approved European RTD Organisations.
7. Up to four Invited Speakers whose primary affiliation is with an institution located in a non-Participating COST Full Member / COST Cooperating Member (which also includes COST Full Members / COST Cooperating Members listed as being under intention and / or individuals who have not yet obtained Action MC approval to participate in a given Action), individuals in non-approved NNC institutions and individuals located in non-approved IPC institutions.

Invited Speakers are specialists who are not Action Participants but can partake in one COST Action meeting and/ or Training School throughout the lifetime of the Action. Invited Speakers can be reimbursed for their attendance at one Training School across the lifetime of the Action and must be invited, and listed, as a speaker on the programme / agenda of the relevant Training School.

Trainers not eligible to be reimbursed:

1. Trainers from EU Commission, Bodies, Offices and Agencies.
2. Other Trainers not specifically mentioned as being eligible.

Trainees eligible to be reimbursed:

1. Trainees from COST Full Members / COST Cooperating Member.
2. Trainees from Approved NNC institutions.
3. Trainees from Approved European RTD Organisations.

Trainees not eligible to be reimbursed:

1. Trainees from COST Partner Members.
2. Trainees from Approved IPC institutions.
3. Trainees from Approved IO, EU Commission, Bodies, Offices and Agencies.
4. Other Trainees not specifically mentioned as being eligible.

5.2. TRAINING SCHOOL TRAINERS – FINANCIAL SUPPORT

Trainers can be reimbursed in line with the eligible travel, accommodation and meal expenses detailed in Section 4.

Lecture fees and honoraria for trainers are not eligible to be reimbursed.

Each trainer must register a profile on e-COST at <https://e-services.cost.eu> - each trainer must add their bank details to their e-COST profile.

5.3. TRAINING SCHOOL TRAINEES – FINANCIAL SUPPORT

The Action MC must define the financial contribution (in the form of a Trainee Grant) for all trainees who will be attending the approved Training School. The Action MC can delegate the pre-mentioned task to the Action Chair (or Vice-Chair if the Action Chair is affiliated to the Grant Holder Institution). Trainee Grants do not necessarily cover all expenses related to attending the Training School. The Trainee Grant is a contribution to the overall travel, accommodation and meal expenses of the Grantee. Different Grants amount can be attributed to each trainee.

The amount afforded to each eligible trainee must respect the following considerations:

1. Each trainee must register for an e-COST profile at <https://e-services.cost.eu> - each trainee must add their bank details to their e-COST profile.
2. The total Grant awarded to each eligible trainee cannot exceed EUR 1500.
3. The amount afforded for accommodation and meal expenses cannot exceed EUR 160 per day. This amount should be calculated with a consideration for the cost of living in the city / country where the Training School is being held.

SECTION 6. LOCAL ORGANISER SUPPORT (LOS)

6.1. LOS RULES

The LOS is a contribution to the overall expenses related to organising approved meetings (excluding Dissemination meetings), Conferences, Workshops and / or Training Schools. The Local Organiser can, in agreement with the Action Chair (and / or Action Vice-Chair if the Action Chair is affiliated to the Grant Holder Institution), choose between two reimbursement modalities which determine the basis for calculating the LOS amount that can be claimed. LOS can only be paid into an institutional bank account and never into a personal bank account.

6.1.1. LOS FINANCIAL SUPPORT / REIMBURSEMENT MODALITIES

There are two LOS reimbursement modalities:

1. Reimbursement Modality 1

The first reimbursement modality enables the Local Organiser to claim a lump sum of up to EUR 20 per participant for each day the participant attends the approved activity.

For the first reimbursement modality, the following conditions are applicable when submitting a Local Organiser Support claim:

- A maximum of EUR 5 000 can be claimed;
- A participant's signature can be counted towards the eligible lump sum amount that can be claimed regardless of the eligibility status of each signee;
- Attendance must be evidenced by each participant signing the attendance list for each day they attended the approved activity;
- The Grant Holder must upload, onto the e-COST platform, the meeting / Training school attendance list(s) for each day of the approved activity. Invoices do not need to be submitted by the Local Organiser for this reimbursement modality.

The Action Chair (or Vice-Chair if the Action Chair is affiliated to the Grant Holder Institution) can choose to approve an amount lower than what the lump sum amount of EUR 20 per participant for each day the participant attended the approved activity permits.

2. Reimbursement Modality 2

The second reimbursement modality enables the Local Organiser to claim eligible expenses which are justified against amounts detailed on invoices. The expenses claimed have to be itemised by means of the Local Organiser submitting a breakdown of eligible expenses. V.A.T. listed on invoices cannot be claimed by the Local Organiser. The claimed expenses must strictly adhere to the category of eligible expenses listed in Section 6.2.

For the second reimbursement modality, the following conditions are applicable when submitting a Local Organiser Support claim:

- A maximum of EUR 10 000 can be claimed;
- A final breakdown of eligible expenses must be encoded into e-COST by the Local Organiser. The Local Organiser must upload onto e-COST all of the invoices concerning the encoded eligible expenses;
- V.A.T. cannot be claimed by the Local Organiser.
- The Local Organiser must upload, onto the e-COST platform, the meeting / Training school attendance list(s) for each day of the approved activity.

6.1.2. LOS FOR CO-LOCATED ACTION ACTIVITIES

An Action may decide to host multiple meetings and / or a Training School over the same time period in the same venue. In such cases, the series of meetings and the Training School are considered to be two separate activities. Therefore, one LOS contribution can be afforded to support the entire series of co-located meetings and a second separate LOS contribution can be afforded to support the Training School.

6.1.3. LOS WHEN CO-ORGANISING ACTIVITIES WITH ANOTHER COST ACTION

A COST Action may decide to co-organise an event with another COST Action. In such cases:

- LOS claims can be submitted by only one of the COST Actions;
- A single LOS Claim can be afforded to support the entire series of co-organised, co-located COST meetings with the COST contribution never exceeding EUR 10 000;
- A single LOS Claim can be afforded to support a co-organised COST Training School with the COST contribution never exceeding EUR 10 000.

6.1.4. LOS WHEN CO-ORGANISING COST ACTION ACTIVITIES WITH AN EXTERNAL CONFERENCE

A COST Action or several COST Actions working together in a synergetic manner may wish to co-organise a COST activity with an external event. In such cases:

- There must be a dedicated COST session visible within the external event's programme;
- COST must be visible as a co-organiser on the event's specific website and publication / dissemination materials;
- A single LOS claim can be afforded to support the entire series of co-located COST meetings with the COST contribution never exceeding EUR 10 000;
- A single LOS Claim can be afforded to support a co-organised Training School with the COST contribution never exceeding EUR 10 000.

The COST Association may request that the Grant Holder and / or the Local Organiser provides a breakdown of income and expenditure associated with an entire event to assure that COST activities have not generated a profit.

6.2. LOS ELIGIBLE EXPENSES

1. Rental of rooms and technical equipment.
2. Photocopying and the printing of programmes, book of abstracts, book of proceedings, flyers etc.
3. Phone, fax and mailing for announcements.
4. For sizable meetings, up to a maximum of 15% of the eligible LOS amount can be claimed by the Local Organiser to support the administrative and secretarial expenses linked to hosting and organising the approved scientific activity.
5. Field trip expenses if scientifically justified and relevant to the objectives of the approved meeting / Training School.
6. Coffee breaks, refreshments and light lunches (light lunches are wraps / sandwiches / finger food etc.) – light lunches count as one meal when calculating an eligible participant's meal provision. This means that any light lunch offered to an eligible participant (irrespective of where the funding for the lunch is sourced) is to be counted as one meal and must be deducted from the daily meal allowance afforded to each participant.
7. One single networking dinner for the entire meeting duration which has to be deducted from the daily meal allowance of each eligible participant.
8. Consumables purchased for Training Schools (see Section 5) such as laboratory materials and / or the rental of scientific equipment. The quantity and nature of the purchased or rented consumables must be coherent with the needs and requirements of the Action Participants who will attend the approved activity.

6.3. LOS NON-ELIGIBLE EXPENSES

1. V.A.T. and any other indirect taxes.
2. A networking dinner exceeding the one single networking dinner limit.
3. Group accommodation bookings.
4. Accommodation bookings for individual participants.
5. Translation or interpretation expenses.

6. Field trip expenses without relevant scientific justification.
7. Purchase of technical equipment and electronic devices such as mobile phones, computers, printers etc.
8. Any expense not listed in the list of eligible expenses detailed in Section 6.2.

SECTION 7. SHORT TERM SCIENTIFIC MISSIONS (STSM)

Short Term Scientific Missions (STSM) are institutional visits aimed at supporting individual mobility, fostering collaboration between individuals.

7.1. STSM – ELIGIBILITY RULES

STSM applicants must be engaged in an official research programme as a PhD Student or postdoctoral fellow or can be employed by, or affiliated to, an institution, organisation or legal entity which has within its remit a clear association with performing research. The institutions / organisation or legal entity where applicants pursue their main strand of research are considered as Home institutions. The Host institution is the institution / organisation that will host the successful applicant.

The following table shows the scenarios available to eligible STSM applicants:

Applicant in a Home Institution	To perform an STSM in a Host Institution
Located in a Participating COST Full Member / COST Cooperating Member	In another Participating COST Full Member / COST Cooperating Member
	In a Participating COST Partner Member
	In an Approved IPC Institution
	In an Approved NNC Institution
	In EU Commission, Bodies, Offices and Agencies
	In an Approved European RTD Organisation
Located in an Approved NNC institution	In an Approved International Organisation
	In a Participating COST Full Member / COST Cooperating Member
Located in an Approved European RTD Organisation	In a Participating COST Full Member / COST Cooperating Member

Eligible STSM applicants must submit their STSM applications online at the following web address: <https://e-services.cost.eu/stsm>

7.2. EVALUATION AND SELECTION OF APPLICANTS

The evaluation of each received STSM application is performed by the Action MC. The Action Chair (or Vice-Chair if the Action Chair is affiliated to the Grant Holder Institution) or the appointed STSM Coordinator / Committee can assume this responsibility if the Action MC gives them the mandate to perform this task on their behalf. The evaluation criteria defined by the Action MC should be communicated to all potential applicants.

The selection of successful STSM applicants must be done so in consideration of the scientific scope of the proposed mission and how the mission can support the Action in achieving its scientific objectives. There should be special considerations made by the Action MC with respect to supporting COST policies on promoting gender balance, enabling Early Career Investigators (ECI), broadening geographical inclusiveness.

7.3. CRITERIA FOR STSM

STSM must respect the following criteria:

- They must have a minimum duration of 5 calendar days.
- They must have a maximum duration of 90 calendar days.
- STSM need to be carried out in their entirety within a single Grant Period and always
- within the Action's lifetime.

Specific additional provisions have also been made possible to encourage the participation of Early Career Investigators (ECI) in STSM. To qualify for these specific provisions, the following conditions apply:

- The mission must have a minimum duration of 91 calendar days.
- The mission must have a maximum duration of 180 calendar days.
- STSM performed by ECI need to be carried out in their entirety within a single Grant Period and always within the Action's lifetime.

The COST Association and the Grant Holder of the Action cannot to be considered as being an STSM grantee's employer. STSM grantees must make their own arrangements for all provisions related to personal security, health, taxation, social security and pension matters.

7.4. STSM – FINANCIAL SUPPORT

An STSM Grant is a fixed financial contribution which takes into consideration the budget request of the applicant and the outcome of the evaluation of the STSM application. STSM Grants do not necessarily cover all expenses related to undertaking a given mission. A STSM Grant is a contribution to the overall travel, accommodation and meal expenses of the Grantee.

The calculation of the financial contribution for each STSM must respect the following criteria:

- Up to a maximum of EUR 2 500 in total can be afforded to each successful applicant;
- Up to a maximum of EUR 160 per day can be afforded for accommodation and meal expenses.

For ECIs, the calculation for an increased financial contribution must respect the following criteria:

- Up to a maximum of EUR 3 500 in total can be afforded to ECIs for missions with a duration of between 91 and 180 calendar days;
- Up to a maximum of EUR 160 per day can be afforded for accommodation and meal expenses.

The Action Chair (or Vice-Chair if the Action Chair is affiliated to the Grant Holder Institution) and / or the appointed STSM Coordinator / Committee can approve differentiated country rates to cover accommodation and meal expenses based on the perceived cost of living in the host country.

Specific provisions have been introduced to enable researchers from ITC participating in the COST Action to request the pre-payment of 50% of their STSM Grant when they complete the first day of their STSM. In such case, the Host must confirm by email to the Grant Holder that the STSM applicant has officially started the mission on day 1. Only then the Grant Holder can arrange the payment of 50% of the STSM grant. The remaining 50% of the Grant is payable once the administrative requirements have been satisfied after the STSM.

7.4.1. APPROVING STSM FOR PAYMENT

The STSM Grantee has 30 calendar days from the end date of the mission to submit a scientific report to the Action Chair (or to the Vice-Chair if the Action Chair is affiliated to the Grant Holder Institution) / the appointed STSM Coordinator / Committee and to a senior researcher affiliated to the Host institution. Payment of the Grant is subject to a scientific report being approved on behalf of the Action by the delegated person(s) responsible and by a senior researcher affiliated to the host institution. Written approval of the scientific report by the aforementioned persons must be uploaded in e-COST for archiving purposes.

SECTION 8. CONFERENCE GRANTS

Conference Grants are aimed at supporting PhD students and ECI researchers from Participating ITC to attend international science and technology related conferences not specifically organised by the COST Action.

8.1. CONFERENCE GRANTS – ELIGIBILITY

The following eligibility criteria applies:

1. Conference Grants are exclusively reserved for PhD students and ECI's with a primary affiliation in an institution located in an ITC.
2. The applicant must make an oral/poster presentation at the conference in question and must be listed in the official event/conference programme. The main subject of the oral presentation / poster presentation / speech at the approved conference must be on the topic of the Action and must acknowledge COST (see Section 9).
3. The participation of each applicant must be pre-approved by the Action MC. Attendance at European conferences is preferred. However, conferences held elsewhere can also be considered.

8.2. EVALUATION AND SELECTION OF APPLICANTS

The evaluation of each received Conference Grant application is performed by the Action's MC. The Action Chair (or Vice-Chair if the Action Chair is affiliated to the Grant Holder Institution) or an appointed Coordinator / Committee can assume this responsibility if the Action's MC gives them the mandate to perform this task on their behalf. The evaluation criteria defined by the Action's MC should be communicated to all potential applicants.

The selection of successful applicants must be done so in consideration of the scientific scope of the proposed mission and how the mission can support the Action in achieving its scientific objectives.

8.3. CONFERENCE GRANTS – FINANCIAL SUPPORT

A Conference Grant is a fixed financial contribution which takes into consideration the budget request of the applicant and the outcome of the evaluation of the application by the delegated person(s). Conference Grants do not necessarily cover all of the expenses related to participating in a given conference. A Conference Grant is a contribution to the overall travel, accommodation and meal expenses of the selected Grantee.

The calculation of the financial contribution for each Conference Grant must respect the following criteria:

- Up to a maximum of EUR 2 500 in total can be afforded to each successful applicant;
- Up to a maximum of EUR 160 per day can be afforded for accommodation and meal expenses.
- Up to a maximum of EUR 500 can be claimed for the conference fees to be incurred by the selected Grantee.

In addition when meal and accommodation expenses are supported by the hosting institution as part of the provisions offered in their conference package, the amount for subsistence afforded to each eligible participant must be deducted from the Grant. Documentary evidence of the conference fee amount must be provided by the applicant and in kind, must be archived by the Grant Holder along with the relevant administrative documents.

8.4. APPROVING CONFERENCE GRANTS FOR PAYMENT

The Grantee has 30 calendar days from the end date of the Conference in question to submit a scientific report to the Action Chair (or Vice-Chair if the Action Chair is affiliated to the Grant Holder Institution) and the Action's Grant Holder.

Payment of the Grant is subject to the submitted scientific report being approved by the Action Chair (or Vice-Chair if the Action Chair is affiliated to the Grant Holder Institution). Written approval of the submitted scientific report must be sent to the Grant Holder for archiving purposes.

In case the Action Chair applies for a Conference Grant, it is the Vice Chair who must approve or reject the request via e-mail, as well as the approval of the scientific report. The written approvals should be sent to the Grant Holder for archiving purposes.

SECTION 9. COMMUNICATING COST ACTION RESULTS

Any COST Action communication tool (e.g. publications, PowerPoints, etc.) must integrate a reference to COST and acknowledge the support of EU funding. All outputs generated by a COST Action must display the COST logo and visual identity as presented in the COST Brand Book (link to website page <http://www.cost.eu/media/dissemination-corporate-identity>).

9.1. PROMOTIONAL MATERIALS

Whenever COST Actions organise / co-organise events, the COST corporate logo, the EU emblem with accompanying text, the COST Action logo (if applicable) and the name, acronym and reference number of the COST Action needs to be visible on all relevant materials which are on display or are being distributed at the event in question.

The use of the COST corporate logo and / or of COST stationery (such as document templates for meeting minutes, agendas etc.) are to be solely used for supporting approved COST Action activities and may not be used for individual representation and / or collective activities that do not pursue the networking objectives of the Action in question.

9.2. WEBSITE DEVELOPMENT, HOSTING AND MAINTENANCE

Action websites may vary in their scope and content. The allocation of COST funds to support website development, hosting and maintenance must clearly support the Action's objectives as set out in the MoU. COST Actions need to launch their websites within their first 12 months of existence and must be maintained for 2 years after the end date of the Action. Actions must provide their Science Officer with a functional link within their first year of activity. It is important that these websites are in line with market standards in terms of user-friendliness, design and content. There must be only one website per COST Action, and one single URL and domain registered it (i.e. no multiple domain registrations). Throughout the lifetime of the Action, website expenses cannot exceed EUR 9 000. An Action can request funding for only one website across the lifetime of the Action.

In order to be eligible for funding, each Action website must clearly display the following items:

1. The COST Association logo, the EU emblem and accompanying text: "Funded by the Horizon 2020 Framework Programme of the European Union". The COST logo is available in the [COST website media section](#).
2. The [EU emblem and its guidelines of use](#) are available on the European Commission's website
3. A link to the Action's main web page on the COST website and a link to the Action's MoU as it appears on the COST website.
4. A link to the relevant COST website pages featuring the COST rules and guidelines: see <http://www.cost.eu/participate>.
5. The names and contact information of the Action Chair, Vice-Chair, Science Officer of the Action and the Administrative Officer of the Action.
6. A short description of COST and a link to the COST website.
7. The possibility and rules for joining the Action and taking part in its activities.

Do not post any official documents (e.g. CSO Decisions...), templates, guidelines directly on the Action website, as such documents are subject to change. Always link to the Participate section on the COST website: <http://www.cost.eu/participate>.

9.3. PUBLICATIONS

Publications funded by COST must be a direct result of work performed by Action Participants and must be co-authored by Action Participants representing at least 3 different Participating COST Full Members / COST Cooperating Members. Wherever possible, publications should be made available under Open Access licences.

Publications generated from work performed by COST Action Participants fall under two distinct categories that are funded differently:

1. Publications produced during an Action's lifetime funded under the CGS - sourced from the COST Grant and paid for by the Action's Grant Holder.
2. Final Action Dissemination (FAD) – whereby up to an amount of EUR 10 000 in total (V.A.T. is not eligible) can be requested for a dissemination activity at the end of an Action. The FAD is funded centrally by the COST Association under the Centralised Management Funding Scheme in the form of a fixed grant. The process governing the administration and funding of the FAD is set out in Section 9.6.

All publications generated from work performed by Action Participants must include, display and respect the COST corporate identity adhering to the brand guidelines detailed in the COST brand book, available for download at: www.cost.eu/media/visualidentity.

9.4. ELIGIBLE EXPENSES

Under the CGS, the following expenses can be funded once approved:

1. COST Action promotional material for display or general circulation including postage expenses for the purpose of enabling the distribution of such materials – e.g. distribution of flyers and posters and pens.
2. Graphic design expenses of up to a maximum of EUR 1000 across the lifetime of the Action – e.g. creation of an Action logo.
3. The creation, development, hosting and maintenance of one Action website.
4. Multimedia content.
5. Conference booths can be considered eligible on a case by case basis and based on the approval of the SO under the condition that COST Action is actively involved in the conference programme through a workshop or speaking opportunity or poster presentation;
6. Publication expenses – which include Open Access licenses and / or expenses supporting the purchase, production and direct distribution of publications developed by Action Participants and produced by a renowned publisher.

Expenses made in the framework of dissemination of your COST Action results and outcomes in the framework of Open Access will be assessed by COST along the lines of quality and impact. COST Actions should therefore be aware of those criteria and make a first assessment in this regard before getting to commit expenses in Open Access:

- Quality of the publication to be assessed along the lines of:
 - Fulfilment of criteria of Section 9.3 above: Publications funded by COST must be a direct result of work performed by Action Participants and must be co-authored by Action Participants representing at least 3 different Participating COST Full Members / COST Cooperating Members; the article processing fees (APF) charged to COST may not exceed the APF published on the journal's Web site.
 - Peer-review process: All of a journal's content, apart from any editorial material that is clearly marked as such, shall be subjected to peer review. Peer review is defined as obtaining advice on individual manuscripts from reviewers expert in the field who are not part of the journal's editorial staff. This process, as well as any policies related to the journal's peer review procedures, shall be clearly described on the journal's Web site.
- Impact of the publication to be assessed along the SCImago Journal Rank (SJR)³ – that has established itself as a good alternative to the Impact Factor - of the considered academic journal. Any journal that is situated in the first three quartils⁴ Q1-Q3 is considered of sufficient impact, while journals in the last quartil Q4 or journals not contained in the SCOPUS database need an assessment by the responsible SO; the SJR and quartil (Q1, Q2, Q3 or

³ SCImago Journal Rank (SJR indicator) is a measure of scientific influence of scholarly journals that accounts for both the number of citations received by a journal and the importance or prestige of the journals where such citations come from, see [D. Butler \(2008\). Nature. 451 \(6\): 6. doi:10.1038/451006a.](#)

⁴ Quartile rankings are derived for each journal in each of its subject categories according to which quartile of the SJR distribution the journal occupies for that subject category. Q1 denotes the top 25% of the SJR distribution, Q2 for middle-high position (between top 50% and top 25%), Q3 middle-low position (top 75% to top 50%), and Q4 the lowest position (bottom 25% of the SJR distribution).

Q4) for each journal contained in SCOPUS can be obtained from the SCImago web page (accessible at www.scimagojr.com/journalrank.php).

7. Proofreading, layouting and editing expenses.

Eligible expenses are payable against the amounts detailed on valid invoices.

9.5. NON-ELIGIBLE EXPENSES

1. Value Added Tax (V.A.T.).
2. Use of COST funds for sponsorship of events / conferences.
3. Fees or charges associated with disseminating or advertising media content and publications that go beyond what is detailed in Section 9.4.
4. Conference fees (except for specific grant or in context of a COST corporate initiative);
5. Marketing gifts such as calendars, pens, etc.
6. Translation costs;
7. Advertisement costs;
8. Any expense not listed in the list of eligible expenses detailed in Section 9.4.

9.6. FINAL ACTION DISSEMINATION (FAD)

Final Action Dissemination (FAD) refers to outputs produced after the end date of the Action in order to share and promote the COST Action's results among wider research community, policy makers, other stakeholders or EU citizens. The FAD is funded by the COST Association in the form of a fixed Grant. The FAD must adhere to the COST branding guidelines detailed in the COST brand book, available for download at: www.cost.eu/media/visualidentity.

Similarly to publications funded under the CGS (see Section 9.3), the FAD must be a direct result of work performed by the Action and must be co-authored by Action Participants representing at least 3 different Participating COST Full Members / COST Cooperating Members.

Approved FAD products or outputs must be ordered and paid directly by each Action's Grant Holder. The COST Association provides a fixed Grant of up to EUR 10 000 contributing to expenses supported by the Action Grant Holder.

The FAD procedure is as follows:

1. In order to request for a FAD Grant the Action Chair, on behalf of the Action MC, must complete the form available here : www.cost.eu/FAD_application_template and send it to the Science Officer in charge of the Action no later than 6 months before the official end date of the Action.
2. The details contained within the request for the FAD Grant must be approved by both the Action MC and the Action's Science Officer. Upon approval by the Action's Science Officer, a Grant notification award letter determining the agreed Grant amount is sent to the Action Grant Holder.
3. Prior to the completion of the final draft of the FAD and sending it to the publisher, the Action Chair / Grant Holder must first send a digital copy / print preview of the final draft product to the Action Science Officer and the COST Communications unit (communications@cost.eu) for the purpose of ensuring that the COST brand guidelines have been respected. Please note that the payment of the FAD Grant to the Action Grant Holder is subject to the COST Association verifying that the final draft of FAD has complied with the COST brand guidelines, as explained in the COST brand book, available for download at: www.cost.eu/media/visualidentity. In the case of print publications, the publisher or Grant Holder must send three hard copies of the final product to the COST Association prior to submitting the invoice for payment. The recipient of the three hard copies of the final product is the Communications unit at the COST Association. In the case of digital material, the Grant Holder must send the Communications unit a link to the online publication.
4. The Action Grant Holder must ensure that the FAD invoice(s) showing the amount(s) payable for the approved FAD is received by the COST Association by no later than 12 months after the official end date of the Action. Failure to submit the FAD invoice(s) within the timeframe specified may result in the cancelation of the FAD Grant.
5. Since COST Action Participants shall never get any financial benefits from publications which are supported or fully paid by COST the Grant Holder must ensure that no Royalties is paid to the authors concerning the number of books which are purchased by the COST Association in the scheme of the FAD Grant.

SECTION 10. GENERAL PRINCIPLES

10.1. ACCESS TO ARCHIVED DOCUMENTS, CONTROLS AND AUDITS

The COST Association or an appointed audit performing organisation or agency, under direct or indirect instruction from the European Commission, are permitted to carry out random checks to examine accounting records and / or supporting documentation linked to administering and financing COST Activities. Grant Holders can therefore be asked to make readily available to the COST Association, or to the appointed audit-performing organisation or agency, legible copies of their accounting records and / or supporting documentation. Any request for documentation will be done so for the purpose of determining whether specific COST activities were implemented and administered in line with the rules and principles set out in the COST Vademecum and the terms and conditions detailed in the Action Grant Agreement. All supporting documentation including Action MC meeting minutes, Action MC approvals and accounting records must be made readily available for inspection up to the end date of the audit timeframe specified in the COST Action Grant Agreement signed between COST and each respective Grant Holder.

All payments sourced from COST funds must be done so for the sole purpose of supporting eligible expenses related to executing approved COST Action activities. All incurred expenses must be reasonable, justified and must comply with the principles of Sound Financial Management (SFM). All expenses incurred throughout the lifetime of an Action must be identifiable and verifiable and must be recorded correctly in the accounting records of the Grant Holder in accordance with standard cost accounting practices of the country where the Grant Holder is registered. All accounting entries must be able to demonstrate a direct reconciliation between the eligible expenses claimed and the amounts paid to beneficiaries.

For Grant Holders opting to use the Strong Authentication feature, original invoices / receipts must be kept by each claimant up until the end date of the audit timeframe as indicated on the Grant Agreement signed between the COST Association and the Grant Holder. All Grant Holders managing Actions that opt for the Strong Authentication feature must archive legible copies of all OTRRs and supporting documentation. This requirement also applies to all supporting documentation relating to meetings, Training Schools, Short Term Scientific Missions (STSM), Local Organiser Support (LOS) expenses, Dissemination activities (including Publications expenses) and Other Expenses Related to Scientific Activities (OERSA) up to the end date of the respective audit timeframe.

If a Grant Holder chooses not to opt for the Strong Authentication feature, they must archive original (signed by hand) OTRR forms. The Grant Holder must also archive legible copies (electronic copies will also suffice) of all supporting documentation (including Action MC approvals) related to meetings, Training Schools, Short Term Scientific Missions (STSM), Local Organiser Support (LOS) expenses, Dissemination activities (including Publications expenses) and Other Expenses Related to Scientific Activities (OERSA) up until the end date of the audit timeframe as indicated on the Action Grant Agreement signed between the COST Association and the Grant Holder.

10.2. RULE DEROGATIONS

Any derogation from the rules and principles referred to in this document require explicit written agreement from the COST Association prior to any commitments or payments being approved, incurred or processed by any Grant Holder.

Derogations from the eligibility rules contained within this document will only be considered if the COST Association determines that there are fair and reasonable explanations for any such derogations. The COST Association reserves the right to approve or reject any request for a rule derogation.

10.3. ACKNOWLEDGING COST

All payments sourced from COST funds throughout the lifetime of the Action must be done so for the sole purpose of supporting approved COST activities. Consequently, approved activities which are organised / co-organised by COST Actions must formally recognise the COST framework. This recognition requires that the branding guidelines detailed in the Guidelines for the dissemination of COST Action results and outcomes (see <http://www.cost.eu/media/dissemination-corporate-identity>) are respected and are visible on all documents (agendas etc.) and all funded dissemination channels

(official website of the Action, the event specific website, presentations, promotional material etc.). COST must also be recognised on Action outputs (including peer-reviewed publications) that benefit either, directly or indirectly, from COST funding.

Non-compliance with the above-mentioned requirements can determine that any related expense or payment sourced from COST funds are non-eligible. In specific cases when the above guidelines are not being or cannot be respected, the Action Science Officer must be informed and must authorise the omission prior to the expense being incurred.