



COST Vademecum Part 1: COST Action

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Introduction

COST is a unique platform where European researchers can jointly develop their own ideas and new initiatives across all scientific disciplines through trans-European networking of nationally funded research activities. Based on a European intergovernmental framework for CO-operation in Science and Technology with 35 Member Countries and one Cooperating State (see “explanation of terms used in this document”), COST has, since its creation in 1971, contributed to closing the gap between science, policy makers and society throughout Europe and beyond.

The COST mission is to enable breakthrough scientific developments leading to new concepts and products and thereby contribute to strengthen Europe’s research and innovation capacities. COST contributes to the objective of strengthening the scientific and technological bases of the European Research Area (ERA) by encouraging researchers to share, create and apply knowledge.

COST is supported by the European Union (EU) Seventh Framework Programme (FP7) of the European Community¹ through a dedicated Coordination and Support Action (CSA). The European Commission (EC) has signed a COST II Grant Agreement with the European Science Foundation (ESF) as COST implementing agent until the end of FP7. The ESF is entrusted with the execution of COST activities and has therefore established the COST Office in Brussels which implements all COST activities as determined by the COST Committee of Senior Officials (CSO) (see “explanation of terms used in this document”).

COST activities are largely arranged as COST Actions. These are selected via a bottom-up, science and technology driven approach. It provides the operational basis for structuring pan-European networks facilitating researchers from COST Member Countries and beyond to jointly develop ideas and new initiatives in any field of science and technology. COST also allows for many other key activities (i.e. Plan for Strategic Activities COST 4111/13, COST Communications Plan 4115/12).

The basic rules and general principles governing all COST activities are established in series of documents approved by the CSO on May 15-16, 2013 under the heading of “COST Implementation Rules”; these rules are comprised of the following documents:

1. COST Rules for Participation in and Implementation of COST Activities (COST 4112/13)
2. COST Action Proposal Submission, Evaluation, Selection and Approval (COST 4113/13)
3. COST Action Management (COST 4114/13)
4. COST International Cooperation Rules (COST 4115/13)
5. COST Code of Conduct (COST 4160/10)
6. COST Rules of Procedure for a COST Domain Committee (COST 4170/10)
7. COST Guidelines for Assessment of applications for COST Actions (COST 4111/11)
8. COST Guidelines for Monitoring, Evaluation and Dissemination of Results of COST Actions (COST 4112/11)
9. COST Guidelines for the organisation of the Annual Progress Conference (APC) (COST 4113/11)

The “COST Implementation Rules” take precedence over the provisions detailed in the COST Vademecum.

The aim of the COST Vademecum is to provide administrative and financial rules with respect to the management and implementation of COST Actions and associated activities. The COST Vademecum is a legally binding document approved by the ESF and follows the rules established by the CSO.

¹ Seventh Framework Programme (FP7) of the European Community for research, technological development and demonstration activities (2007-2013) (Decision No 1982/2006/EC of the European Parliament and of the Council of 18 December 2006)

Explanation of terms used in this document:

Action's Memorandum of Understanding (MoU) means the agreement accepted by a minimum of five different COST Member Countries and/or Cooperating State describing the Action objectives and the added value of networking. This document has to be endorsed by any additional COST Member Country or Cooperating State joining the Action. The MoU has, as a technical annex, the full proposal submitted in the frame of the Open Call.

Researcher: is anyone engaged in the conception or creation of new knowledge, products, processes, methods and systems in the project concerned. For the purpose of participating in COST Actions, any individual, independently of their institutional affiliation shall be considered as a researcher.

Early Stage Researcher (ESR) is a researcher in the start phase of his/her career with at least the PhD and up to 8 years of experience after the PhD.

Participating COST Countries refer to COST Countries or Cooperating State which have accepted the Action's MoU.

COST Near Neighbours Countries (NNC) are countries approved by the CSO to benefit from dedicated support for the integration of their researchers in COST activities. The full list of NNC is detailed in Annex II.

NNC approved institution is an institution located in a NNC whose participation to an Action has been approved in accordance with the relevant COST rules (refer to Annex II and COST Doc 4115/13).

Specific Organisations refer to the European Commission, other EU Institutions and EU Agencies, European RTD Organisations and International Organisations (refer to Annex II and COST Doc 4115/13).

Approved Specific Organisations refers to a Specific Organisation whose participation to an Action has been approved in accordance with the relevant COST rules (refer to Annex II and COST Doc 4115/13).

International Partners Countries (IPC) means all those countries that are neither COST Member Countries, nor Cooperating State nor COST NNC (refer to Annex II and COST Doc 4115/13).

IPC approved institution is an institution located in an IPC whose participation to an Action has been approved in accordance with the relevant COST rules (refer to Annex II and COST Doc 4115/13). Specific rules apply to **Reciprocal Agreements Countries** as defined in section 6)

Action Participants mean any researcher who participates actively in a COST Action (MC Members, Working Group members etc.); this can include researchers from Near Neighbour and International Partner Countries as well as other Specific Organisations, i.e. the European Commission, EU Agencies, etc.

Action Management Committee (MC) members is a group of researchers, nominated by the COST National Coordinator (CNC), in charge of the coordination, implementation, and management of an Action's activities as well as supervising the appropriate allocation and use of the COST funding with a view to achieve the Action's scientific and technological objectives (see section 1.3.1).

MC Chair and MC Vice Chair are elected during a MC Meeting among the Action Members. The Chair is responsible for coordinating and implementing the Action. The MC Vice Chair assists in these activities as necessary, and substitutes for the Chair whenever required (see section 1.3.2).

MC Observers are participants affiliated with NNC approved institutions, with approved Specific Organisations or with IPC approved institutions. (see section 1.3.3 and to COST doc.. 4114/13)

Invited Speakers are specialists who are not Action Participants and who are participating to one COST Action meeting or training school, as a one off measure.

External Independent Experts are invited by the COST Office to assess COST Actions activities or other activities or to participate in the dedicated Assessment Panels of the related Action.

COST Member Country: means any country that was a founding member of the COST Intergovernmental Framework or joined COST as a full member following the approval of the COST Committee of Senior Officials (CSO). COST Member Countries 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, The Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom and Former Yugoslav Republic of Macedonia.

COST Cooperating State: means a country that has been approved by the CSO to participate without voting rights in the CSO. The COST Cooperating State is: Israel.

The Committee of Senior Officials (CSO) is the main decision-making body responsible for the strategic development of COST. It decides, amongst other things, on the proposed new Actions following the Open Call. Each COST Member Country and Cooperating State appoints up to two representatives to the CSO.

JAF - The Executive Group of the CSO, referred to as **JAF**, prepares the CSO meetings and some every day decisions delegated by the CSO. The group consists of the President and the Vice-President of the CSO as well as five other delegates from the CSO chosen to represent different COST countries.

COST National Coordinator (CNC): means the individual appointed by the COST Member Countries and Cooperating State in charge of accepting the Action Memorandum of Understanding, of the nomination process for the Domain Committee and Management Committee members as well as providing information and support to national research communities.

Domain Committees (DC) consists of experts from the respective Domain who are nominated by COST countries. The DC reports to the CSO and is responsible for the quality control of the allocated Actions (assessment, monitoring and evaluation). The DC also supervises the strategic development of their respective Domains.

1. COST Action

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1.1 COST Action overview

A COST Action is a science and technology network of minimum five COST Member countries and Cooperating State with a duration of four years, allowing researchers to jointly develop their ideas and initiatives in a given scientific field in accordance with the Action's Memorandum of Understanding (MoU). The Action's activities are organised by a Management Committee (MC) through a range of networking tools.

COST activities are networks open to:

1. All fields of Science & Technology, fostering new, emerging and interdisciplinary fields;
2. Any novel, original and innovative idea;
3. Researchers at all career stages - both young and senior investigators;
4. All stakeholders (researchers, engineers, practitioners, decision-makers, representatives of public authorities);
5. All partners (whether public or private, big and small);
6. Near Neighbour Countries (NNC) and International Partner Countries (IPC);
7. Specific Organisations such as European RTD institutions and agencies or International Organisations.

COST invites researchers affiliated to institutions based in COST Member Countries and Cooperating State to submit proposals for new Actions, through a continuous Open Call for Proposals. Each Collection Date is announced periodically in the Official Journal of the European Union. The Open Calls are also published on the COST website (www.cost.eu). The Open Call Procedure is established by the CSO and is detailed in COST doc 4113/13.

Once the evaluation and selection procedure has been concluded, and the Action proposal has been formally approved by the CSO, an Action Memorandum of Understanding (MoU) is prepared by the Action proposer in conjunction with the COST Office. The MoU forms a multilateral agreement that must be accepted by at least five COST Member Countries and/or Cooperating State before the Action can come into effect. It contains a description of the objectives, scientific programme and organisation, networking activities, benefits and deliverables of the prospective COST Action. The start date of a COST Action coincides with the date of the First MC meeting. An Action runs for 4 years from its start date. A general overview of a COST Action life cycle can be seen in Annex 1.

The COST Action may be extended beyond its originally intended end date if, during the course of the Action, the MC determines that it is, for technical reasons, impossible to bring the work under the Action to a satisfactory conclusion within the originally envisaged period of duration. Extensions of COST Actions are exceptional and must be duly justified from an S&T or network activities point of view. Should the COST Action that requests an extension need a budget increase, both requests must be introduced at the same time. The final assessment of Actions having benefited from an extension shall include a dedicated section assessing the extension period (see COST 4114/13).

1.1.1 First MC meeting

The First MC meeting of an Action marks the official start date of the Action. The First MC meeting is always organised and funded by the COST Office. It is held in the COST Office premises and is chaired by the COST Office Science Officer in charge of the Action. Participants' reimbursement rules are defined in section 5.

1.1.2 COST Action funding scheme

COST Actions are managed under the COST Grant System (CGS) - (see section 2). Under the CGS, a research performing institution, of which one of the MC members is affiliated to, is elected and entrusted with the administrative and financial management and coordination tasks linked to supporting the execution of approved COST Action activities. This institution becomes the Grant Holder. The Grant Holder must perform the agreed tasks in strict adherence with the rules detailed in this document as well as the superseding CSO rules and the COST Action Grant Agreement.

COST Actions are governed by the COST Implementation Rules and sound legal, contractual, ethical and administrative principles. It is expected that all necessary care will be taken to avoid any bias on the grounds of gender, age or nationality throughout all Action activities. In order to ensure the objectivity and independence of any decision taken by the relevant stakeholders with respect to the above considerations within the Action, any potential conflict of interest must be avoided where possible and be declared where necessary. This premise also holds true for all interactions between the MC Chair, the MC Vice Chair, Action Participants, both of the Action's financial rapporteurs, all individuals representing the Grant Holder institution and all individuals representing or linked to COST operations.

Exceptionally, it is possible that well-defined Action activities can be managed under Pay As You Go (PAYG) scheme. This method should only be considered on an *ad-hoc* basis and for a limited period. Action activities operating under the PAYG system require prior approval from the COST Office.

1.2 COST Action participation

1.2.1 COST Member Countries and Cooperating State participation

COST Member Countries and Cooperating State (and related researchers) can participate in COST Actions once they have accepted the relevant MoUs of the concerned Actions. 12 months after the Action has been approved by the CSO, the participation of COST Member Country and Cooperating State is subject to the approval of the MC of the related Action.

MC members must be invited and are eligible to be reimbursed for their attendance at MC Meetings. Subject to MC approval, Action participants located in Participating COST Countries can attend approved Meetings, STSMs and Training Schools and can be reimbursed in compliance with the rules governing the eligibility for reimbursement for COST Member Countries and the Cooperating State detailed in section 3, 4, 6 and 7.

1.2.2 Near Neighbour Countries participation

Researchers in **Near Neighbour Countries** (NNC) from universities, research centres, companies or other relevant legal entities may participate in a COST Action on the basis of the ascertained mutual benefit. The full list of NNC and the application and approval process are detailed in Annex II. The participation of researchers of NNC in a COST Action shall be approved by the MC, DC and JAF. Researchers from NNC can be included in the initial proposal, thus their participation is approved *de facto* when the Action is approved by the CSO, however subject to the consent of the MC once established. They may be invited by the MC as MC Observers with no voting rights in accordance with the COST Rules for International Cooperation (COST 4115/13). MC Observers from NNC cannot be elected as Action's Chair or Vice Chair. The rules governing the eligibility for reimbursement of participants from approved NNC are detailed in section 3, 4, 6 and 7.

1.2.3 International Partner Countries participation

Researchers in **International Partner Countries** (IPC) from universities, research centres, companies or other relevant legal entities may participate in a COST Action on the basis of ascertained mutual benefit. **Reciprocal Agreement Countries** (Australia, Argentina, New Zealand, and South Africa) are regarded as IPC. Additional information about IPC (definition, application and approval process) is available in Annex II. Participation of researchers of IPC in a COST Action shall be approved by the MC, DC and JAF. Researchers from IPC can be a COST Action Participant in the initial proposal, thus their participation is approved *de facto* when the Action is approved by the CSO, however subject to the consent of the MC once established. They may be invited by the MC as MC Observers with no voting right in accordance with the COST Rules for International Cooperation (COST 4115/13). MC Observers from IPC cannot be elected as Action's Chair or Vice Chair. The rules governing the eligibility for reimbursement of participants from approved IPC are detailed in section 3, 4, 6 and 7.

1.2.4 Specific Organisations participation

Specific Organisations refer to: the European Commission (including the EU Agencies), European RTD Organisations and International Organisations according to COST doc 4112/13 and 4115/13. MC Observers from Specific Organisations can never be elected as Action's Chair or Vice Chair. Additional information about Specific Organisations (definitions, application and approval process and where applicable a list of the institutions concerned is available in Annex II).

The **European Commission** (EC) may participate in a COST Action and can nominate a representative to the Action MC to participate as an MC Observer with no voting rights. Other EU Institutions and EU Agencies may participate in COST Actions. Participation of these institutions and Agencies is subject to the same conditions applicable to the EC. When applications from the EC to join the Action are submitted more than one year after the date the CSO approved the COST Action, then participation is subject to the approval of the MC of the related Action. The rules governing the eligibility for reimbursement of participants from EC are detailed in section 3, 4, 6 and 7.

European RTD Organisations may participate in a COST Action and can nominate a representative to the Action MC to participate as an MC Observer with no voting rights. When applications from European RTD Organisations to join the Action are launched one year after the date the CSO approved the COST Action, then their participation is subject to the approval of the MC of the related Action. The rules governing the eligibility for reimbursement of participants from approved European RTD Organisation are detailed in section 3, 4, 6 and 7.

International Organisations (IO) may participate in a COST Action but their participation must first be approved by the MC, DC and JAF. Researchers from IO can be a COST Action Participant in the initial proposal, thus their participation is approved de facto when the Action is approved by the CSO, however subject to the consent of the MC once established. Researchers from participating Specific Organisations may be invited by the Action MC as MC Observers with no voting right in accordance with the COST Rules for International Cooperation (COST 4115/13). The rules governing the eligibility for reimbursement of participants from approved IO are detailed in section 3, 4, 6 and 7.

1.3 COST Action actors

1.3.1 Management Committee members

The MC is composed of delegates nominated by their respective COST National Coordinator (CNC). It is in charge of the coordination, implementation and management of an Action with a view to achieving the Action's scientific and technological objectives. Please note that each respective COST Member Country and Cooperating State defines their MC nomination procedure at a national level. Additional important information concerning to the role and responsibilities of the MC can be found in doc COST 4114/13. MC Meetings shall be officially held only if at least two-thirds of the Participating COST Countries are represented. Decisions of the MC shall be taken by simple majority vote of MC Members present or represented at the meeting, with one vote per Participating COST Country.

1.3.2 MC Chair and MC Vice Chair

During the First MC meeting of the Action, the MC elects an MC Chair and an MC Vice Chair from amongst its members by a simple majority vote (see COST 4114/13). The MC Chair and MC Vice-Chair must represent two different Participating COST Countries.

The MC Chair must perform the following tasks (financial matters such as approval of payments and approval of the Financial Reports -must be assumed by the MC Vice Chair when the MC Chair is affiliated to the Grant Holder institution)

1. Coordinate the Action activities in line with the scientific scope and objectives defined in the Action MoU and with the annual Work Plan;
2. Convene and chair the MC meetings, including preparing the meeting agenda and validating the meeting minutes;

3. Coordinate the approval process of applications from institutions from NNC and IPC, as well as Specific Organisations (see Annex II), as well as applications from COST Member Countries that are launched one year after the date the CSO approved the COST Action;
4. Represent the Action during the related Domain Annual Progress Conference and during the Action Final Assessment meeting (see section 1.4);
5. Prepare an annual Work and Budget Plan to be approved by the MC in line with the budget allocation as determined by the COST Office;
6. Where amendments to the approved Work and Budget Plan are necessary, prepare a revised Work and Budget Plan to be approved by the MC in line with the changes which have been agreed by the COST Office Science Officer;
7. Communicate necessary MC approvals concerning COST activities and expenditures (Meetings, Short Term Scientific Missions, Training Schools, Dissemination etc.) to the Grant Holder and the COST Office (where applicable);
8. Define and communicate to the Grant Holder, on behalf of the MC, amongst eligible participants those entitled to be reimbursed and approve the reimbursements of all such participants;
9. Approving payments;
10. Review, approve and sign the Yearly Financial Reports (see section 2.5.3).
11. Regularly inform the COST Office and the DC Rapporteur about on-going COST related activities;

1.3.3 MC Observers

There are three sub-categories of MC Observers: participants from approved NNC, approved IPC and from approved Specific Organisations.. MC Observers can attend MC Meetings (as detailed in section 3) but have no voting rights and can participate in any approved Action activities. The reimbursement entitlements of these 3 sub-categories are detailed in section 3, 4, 6, 7.

1.3.4 Action financial rapporteurs

The two financial rapporteurs of the Action are elected by the MC during the Action's First MC meeting or alternatively by written procedure.

At the end of every grant period, the financial rapporteurs must receive, via the MC Chair the relevant Yearly Financial Report (see section 2.5.3) and must assume the following responsibilities:

1. Certify that the overall expenses were necessary for the scientific progress of the Action;
2. Certify that the Grant Holder managed the funds in line with the MC decisions.

The Financial Rapporteurs must inform the COST Office of the result of their evaluation via the MC Chair and the Grant Holder, by means of a signed written statement. If inconsistencies are evident on the submitted Yearly Financial Report, it is then the duty of the financial rapporteurs in question to report their concerns directly to the COST Office. The confidentiality of their disclosure is assured.

1.3.5 Working Group members

The objectives of Working Groups are to perform the necessary tasks required for the Action to fulfil its objectives as defined in the MoU. The MC may appoint Working Group Members for each of the Working Groups. It is highly advisable that every MC Member is appointed as Working Group Member. Members are selected from amongst MC Members, or MC Observers from NNC, IPC, Specific Organisations, as well as any researchers from Participating COST Member Countries.

1.3.6 Working Group Leader and Vice leader

The MC appoints for each Working Group a Working Group Leaders (and if deemed necessary Vice Leaders and/or Co-Leaders). They are in charge of:

1. Coordinating and manage activities and tasks associated with the Action objectives relevant to the specific Working Group;
2. Providing progress reports to the MC and present Working Group progress to the DC rapporteur (refer to 1.3.10) and the COST Office if deemed necessary;

3. Ensuring appropriate dissemination of results and output generated by the Working Group in order to maximise Action impact.

1.3.7 Core Group members

The MC may constitute a Core Group composed of a subset of its Members. The set-up of the Core Group, its composition and its mandate to steer the Action on behalf of the MC must itself be approved by the MC. Any conclusion/decisions reached by the Core Group must also be reported to the MC. The eligibility rules detailed in section 3, 4 apply in all instances. Any decision taken by the Core group must be consistent with the eligibility rules and principles detailed in this document.

1.3.8 STSM coordinator / committee

It is a usual practice for an Action to appoint a STSM coordinator or committee, who will ensure the evaluation of the STSM applications, the selection of successful candidates, and the approval of the scientific report of the STSM applicants (as defined in section 6). The setup of the committee, its composition (or the name of the STSM coordinator) and the mandate received from the MC to take decisions on its behalf must be approved by the MC. The MC must be informed of any conclusions/decisions reached/taken by the STSM coordinator or committee during the following MC meeting. The successful STSM applicants, the institutions involved and the amount of the Grant in question should be recorded in the minutes of the first subsequent MC meeting.

1.3.9 Other coordinator / committee

An Action can also appoints other coordinator(s) or committee(s) (such as dissemination committee), who will be responsible for coordinating and managing the tasks delegated to them by the MC. The setup of the committee, its composition (or the name of the coordinator) and the mandate received from the MC to take decisions on its behalf must be approved by the MC and recorded in the meeting minutes. The MC must be informed of any conclusions/decisions reached/taken by the coordinator or committee during the subsequent MC meeting.

1.3.10 Invited Speakers

Invited Speakers are specialists who are not Action Participants and who are participating to one COST Action meeting or training school, as a one off measure. They must appear as a speaker in the agenda of the relevant meeting. Invited speakers can be affiliated with any institution located in a Participating COST Country, any institution located in a non-participating COST Country or Cooperation State, any non-approved NNC institution or any non-approved IPC institution. The same Invited Speaker cannot be reimbursed more than one time across the Action lifetime.

1.3.11 DC Rapporteur

Each DC appoints a DC Rapporteur to each Action. The role of the DC Rapporteur is to evaluate the Actions scientific progress and output in relation to the objectives defined in the MoU, and to provide updates to the DC and the COST Office (refer to doc COST 4112/11).

The DC Rapporteur evaluates the performance of the Action using the following consideration:

- The level of achievement of the Action objectives;
- The Work and Budget Plan implementation against the scientific and/or technological objectives;
- The effective use of the appropriate COST Networking Tools to achieve the scientific objectives;
- Reasons and justifications of possible deviations from achieving the Actions scientific objectives;
- Country balance, gender balance and ESR participation;
- Effective dissemination of scientific and technological outputs and the generated impact.

The DC Rapporteur shall:

- Attend the First MC meeting of the Action;
- Advise the MC regarding the Action management (with the support of the COST Office);
- Monitor the Action performance by attending one MC meeting per grant period. The MC Chair and WG Leaders must present the achievements of the Action to the DC Rapporteur;
- Report to the DC and inform the COST Office regarding the performance of the Action;
- Report tangible output and the potential impact of the Action networking activities to the DC and the COST Office;
- Not be actively involved in the Action to avoid any potential conflict of interest;
- Participate in the Final Assessment of the Action and review the Final Assessment Report.

1.4 Action scientific reporting

1.4.1 Annual Progress Conference

The Annual Progress Conference (APC) is a meeting convened annually for the purpose of reporting on and measuring the scientific achievements and impact of COST Actions. The Actions are evaluated against the objectives set out in their respective MoU. It is mandatory that the MC Chairs of all running COST Actions attend the APC unless determined otherwise by the COST Office. The substitution of an MC Chair by an Action Representative should be a one-off exception - repetitive absence of the MC Chair from the APC may affect on the overall evaluation of the Action performance. The scientific reporting required for the APC is detailed in COST Doc 4113/11 and in 4112/11.

The following must be submitted to the COST Office before the APC:

1. Monitoring Progress Report (available at <http://www.cost.eu/participate/networking>) must be sent at latest 6 weeks before the APC, to both to the COST Office and to the DC Rapporteur;
2. an Action poster (available at <http://www.cost.eu/participate/networking>) has to be submitted to the COST Office at the latest 2 weeks before the APC;
3. a PowerPoint presentation (available at <http://www.cost.eu/participate/networking>) - an Action representative must deliver a presentation at the conference which will:
 - highlight the scientific achievements in relation to the initial objectives as defined in the MoU;
 - present the justified deviations from the objectives defined in the MoU and highlight the problems encountered in the Action to date;
 - highlight impact and output especially in relation to the COST mission and objectives.

1.4.2 Action final assessment and final scientific report

An Action final assessment is performed by the Assessment Panel composed of the DC Rapporteur, COST Office Science Officer, and 1 or 2 external assessors as well as the MC Chair and Grant Holder Scientific Representatives (refer to section 2.3 and to COST 4112/11). This assessment is mandatory and can take place during the final workshop or conference serving to highlight and showcase the achievements of the Action (refer to section 3.6). To enable this assessment, the MC Chair must deliver a final scientific and financial report (using the template provided) which can demonstrate their scientific achievements in relation to the scientific objectives defined in the MoU. The report must highlight the results, outputs and impact of the Action. The report must also justify the deviations from the Action objectives and explain common problems experienced throughout the lifecycle of the Action.

The final scientific and financial report to be provided to Assessment Panel is composed of:

1. **The general Action presentation** to be delivered by the MC Chair at the final event must contain the following:
 - A summary of the overall expenditure used to support the scientific objectives;

- 
- Any major problems encountered, and how solutions were implemented;
 - Specific dissemination measures used to show impact of Action achievements and output the including final publication;
 - Involvement of the private sector, European Commission, policy makers;
 - Impact on all stakeholder and civil society.
2. **Working Group progress reports** to be delivered by Working Group Leaders must show:
- Achievements of the specific working group in relation to scientific objectives;
 - Relevant output and dissemination activities of the working group activities;
 - Any major problems encountered, and how solutions were implemented;
3. **Grant Holder Report (see section 2)** must show;
- Budget allocation and implementation overview including an overview of the general use of the Financial Scientific and Administrative Coordination tasks (FSAC see section 2.5);
 - Any major problems encountered, and how solutions were implemented;

The draft final scientific and financial report needs to be submitted to the Assessment Panel at least 2 weeks prior to the Action final Assessment Panel meeting. The final scientific report has to be provided at the latest 4 months after the Action final assessment panel meeting. It must include all relevant documentation, which underpins the Actions scientific achievements. Failure to submit the final scientific report as required in the timeframe specified above may entail legal action.

Following receipt of the final scientific report, the Assessment Panel drafts a final assessment report (within a timeframe of 60 days). This is, in turn, reviewed by the Action DC Rapporteur and is evaluated by the DC in the DC general assessment of the Action (COST 4112/11).

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2.1 Cost Grant System (CGS) and e-COST

Under the COST Grant System (CGS) the Action management is delegated to the Action itself. The Action funds its activities based on an annual contract (Grant Agreement) in line with the work and budget plan approved by its own MC. In the CGS, the financial responsibility is transferred from the COST Office to the Action Grant Holder which is responsible for the administrative and financial management of the Action in respect to the MC decisions, and within COST rules.

In order to allow Actions Grant Holders to manage their tasks as defined in section 2.5, the COST Office has developed an on-line tool called e-COST. e-COST shall be used by Grant Holders to manage the administration and the financial aspects of the Action. The use of e-COST by Actions Grant Holders is mandatory.

2.2 Selection of the Grant Holder

The Grant Holder must be a legal entity under national or international, public or private law. It cannot be an individual. The Grant Holder is responsible for the execution of the financial, scientific, administrative and coordinating tasks of the Action; based on MC decisions and in accordance with the Grant Agreement, the Vademecum, and the relevant set of COST Rules.

The Grant Holder must be an institution to which one of the MC members is affiliated. The MC must elect the Grant Holder, at either the First MC meeting (this MC decision must be recorded in the minutes of the MC meeting), by e-voting or by written procedure. When electing the Grant Holder, the MC should specifically take into consideration:

1. The economic and practical aspects concerning the management of all financial aspects of the Grant (i.e. local taxation schemes, potential currency exchange expenses etc.);
2. The required administrative capacities and financial stability of the chosen Grant Holder Institution;
3. Any potential conflict of interest;
4. Comply with COST reimbursement rules.

The COST Office may request the official statutes and/or statement of accounts from the selected Grant Holder. Please note that any consequent evaluation may determine that the replacement of a specific Grant Holder be necessary. Any change in Grant Holder requires prior notification to the COST Office and approval by the MC.

If the MC Chair is affiliated with the Grant Holder, the Vice Chair shall represent the Action for financial matters. In this case, any decisions which according to the COST Vademecum require MC Chair approval must be approved by the MC Vice Chair.

2.3 Grant Holder representatives

The Grant Holder is represented by 4 positions. Depending on the internal organisation of the Grant Holder, the same person can represent more than one position:

1. **Scientific representative:** this is the MC Member affiliated with the Grant Holder and represents this institution within the MC. The Grant Holder scientific representative must:
 - Attend all MC meetings;
 - Provide support for the evaluation of the Action, together with the MC;
 - Provide to the COST Office any scientific explanatory notes and/or documentation as required.

In case where the post of the scientific representative of an Action becomes vacant during an on-going Grant Period, and no other MC member or MC substitute is affiliated with the Grant Holder available to fill in the vacant post, then:

- Either the respective COST Country nominates another researcher affiliated with the Grant Holder to become an MC Member; in this case this researcher becomes de facto the scientific representative;

- Or the Grant Holder appoints one of its staff members as the scientific representative until the end of the on-going Grant Period. In case where no researcher affiliated with the Grant Holder is nominated as MC Member of the Action during the on-going Grant Period, then a new Grant Holder will have to be elected by the MC following the rules defined in the section 2.2.
2. **Legal representative:** the person within the institution who bears legal authority to sign the COST Grant Agreement (e.g. the Rector of a University).
 3. **Financial representative:** the person from the Grant Holder Institution who has the legal authority to financially commit the institution in question and to approve and sign off on financial reports.
 4. **Grant Holder manager:** this is the person affiliated with the Grant Holder in charge of the administrative management of the COST Action.

2.4 Action Grant Agreement and Work and Budget Plan

The Action Grant Agreement and the Work and Budget Plan must be agreed and signed by the COST Office and the Grant Holder for every grant period. Payment requests are also linked to the financial reporting (see section 2.5.3). It is therefore of high importance that the Grant Holder and the MC take all the necessary measures to submit the different reports in a timely manner and within the time frame specified in the Grant Agreement.

Documents related to the COST Grant System (specifically Grant Agreements, Grant Agreement Amendments, Notifications of Change, Work and Budget Plans, Payment Request Forms) must be signed by hand with the original signature on the signatory page. Every other page of the document must be initialled using blue ink. The originals must be sent to the COST Office by post.

2.4.1 Action Grant Agreement

The Action Grant Agreement is a legal contract which establishes the obligations of the Grant Holder towards the COST Office. In most instances, it covers a one-year period and must be signed by both parties for it to become legally binding. The Action Grant Agreement cannot be transferred by the Grant Holder to a third-party.

The Grant Holder agrees to not divulge or communicate those contractual and financial elements relating to the Grant Agreement signed with the COST Office, without the prior agreement of the COST Office. This obligation applies for up to 5 years after the end of the EC-ESF COST II Grant Agreement (May 31st, 2019). This obligation is not applicable where contractual and financial elements relating to this Grant Agreement are provided to COST, to the Action MC, to the DC, to the CSO and its Secretariat, and to any external experts that have been officially appointed by one of the above mentioned bodies. This obligation is also not applicable where the information in relation to carrying out the COST Action is communicated to the final beneficiaries of the COST Action, and to third parties for dissemination and publication purposes.

2.4.2 Work and Budget Plan

The MC is required to plan and define the Action's activities and related budget in the Work and Budget Plan, which is an annex of the Grant Agreement. The total budget shall be split into 6 budget lines including COST Networking tools, other expenses and the FSAC:

1. Meetings;
2. Short Term Scientific Missions (STSMs);
3. Training Schools;
4. Dissemination;
5. Other Expenses related to Scientific Activities (OERSA);
6. Financial Scientific and Administrative Coordination tasks (FSAC) (refer to section 2.5).

The MC may rearrange the allocation of scientific expenditures. However, the MC cannot change the budget allocation (amount and percentage) linked to the FSAC.

2.4.3 Action Grant Agreement Amendment and Change Notification

An amendment of the Action Grant Agreement is mandatory when:

1. A change of the legal status of the Grant Holder is evident;
2. A change of a grant period end date is necessary.
3. An increase or decrease of the Action's budget is necessary (following the approval of a new Work and Budget Plan by the COST Office);

The amendment must be signed by the COST Office and the Grant Holder before the end date of the grant period in question.

In cases of a change of the appointed legal, financial or scientific representative (see 2.3), or of the bank account of the Grant Holder during an on-going grant period, an amendment is not necessary. On receipt of any such notification, the COST Office will provide a "change notification to Action Grant Agreement" template which must be signed by the legal representative of the Grant Holder.

2.4.4 Payment modalities

Grant payments are made in EUR and can only be paid into the Grant Holders institutional bank account. Payments to an individual's private bank account are not permitted.

Bank and/or currency related charges linked to the payments described in this section are to be borne by the Grant Holder:

1. For the Action's first grant period, a first payment of 65% of the allocated grant amount is made to the Grant Holder. For the first payments for subsequent grant periods, the payment can only be processed once the Yearly Financial Report (YFR) from the previous period has been reviewed and validated by the COST Office (see section 2.5.3) and the amount corresponding to the unspent grant of the previous grant period has been deducted accordingly.
2. For all grant periods, a second payment of 35% of the allocated grant amount is made with the following consideration:
 - The "Request for payment" as stated on the Intermediate Financial Report (IFR) (see section 2.5.3);
 - The "Request for payment" should be submitted between month 6 and 8 of the relevant grant period.
3. In exceptional cases, when the full 35% of the grant is deliberately not requested by the Grant Holder at the time when the second payment is being processed, then a third payment of the remaining amount of the grant is possible and may occur after the submission of the YFR. This payment option is subject to COST Office approval.

2.4.5 Reimbursement of funds to the COST Office

The COST Office reserves the right to reclaim funds from the Grant Holder in cases where any of the following occurred:

1. an under-spend at the end of the last period of the Action;
2. an under-spend at the end of the respective grant period grant where a change of Grant Holder is required;
3. non fulfilment of the Grant Holder's contractual obligations and related tasks.

In any of the pre-mentioned scenarios, the Grant Holder has to provide a YFR (see section 2.5.3) to close the respective grant period. Once the YFR has been validated by the COST Office and an underspend is evident, a reimbursement request letter will be sent by the COST Office to the Grant Holder requesting the reimbursement of the unspent funds.

2.4.6 Non-fulfilment of contractual obligations or mismanagement of funds

Mismanagement of the allocated funds, non-performance and non-application of the contractual obligations and COST rules, may lead to:

1. A suspension of all payments, and a recovery of the amounts already granted;
2. A premature replacement of the Grant Holder;
3. Financial penalties as specified in the relevant section of the signed Grant Agreement.

2.5 Grant Holder tasks

The Grant Holder performs the administrative tasks relating to managing and coordinating the agreed scientific activities undertaken during a given grant period and must perform these tasks according to best scientific stewardship and in accordance with the terms and conditions specified in the Grant Agreement, the Vademecum, the COST Code of Conduct and the relevant set of applicable COST Rules. If, due to external circumstances, the Grant holder can no longer satisfactorily perform these tasks, then the COST Office must be informed immediately. Otherwise, the COST Office may consider any significant delays or notable performance concerns related to performing the agreed tasks as non-fulfilment of contractual obligations and may consider further action.

The Financial, Scientific, Administration and Coordination (FSAC) budget line is a fixed percentage contribution allocated to the Grant Holder which support the administrative tasks relating to managing and coordinating the agreed scientific activities undertaken during a given grant period. The FSAC percentage, which can represent up to a maximum of 15% of the scientific expenditure, is defined in the approved Work and Budget Plan. At the end of each grant period, the final FSAC amount is calculated by applying the initially defined and approved FSAC percentage to the actual eligible scientific expenses. The FSAC can never represent more than 15% of the actual eligible scientific expenditure.

In cases, where an amendment to the Grant Agreement is necessary, a possible percentage 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 Office shall consider each request for an increase in FSAC on a case-by-case basis and will determine whether such an increase is necessary.

2.5.1 Scientific coordination tasks of the Grant Holder

The Grant Holder must support the MC in the production of the scientific reports required for the proper implementation, follow up and assessment of the Action (as detailed in section 1.4).

2.5.2 Administrative tasks of the Grant Holder (non-exhaustive list)

1. Preparation of documentation for meetings under the stewardship of the MC Chair / Vice Chair (e.g. agendas, invitations, minutes, attendance lists);
2. Participation of the Grant Holder Manager to Action's meetings;
3. Collection and archiving of supporting documents related to reimbursements and the associated payments;
4. Collection and archiving of supporting documents related to Action activities and budgeting;
5. Archiving of all MC decisions relating to Action activities and budgeting.

2.5.3 Financial tasks of the Grant Holder (non-exhaustive list)

1. Ensure that all claims are paid to Action Participants in line with the eligibility criteria specified in the COST Vademecum. The Grant Holder must process reimbursements to eligible participants within 30 calendar days of the receipt of completed files. In cases where advance payments are requested by participants and/or grantees, the Grant Holder assumes any financial risk associated with doing so. The payment shall be recorded in e-COST only after all the administrative requirements required for reimbursing participants and/or grantees have been satisfied;

2. Preparation and delivery of financial reports within the deadlines indicated in the Grant Agreement. Financial Reports need to be printed, signed by hand by the authorised persons and submitted to the COST Office. The COST Office is only responsible for checking the submitted report. In case of fraud or any erroneous information recorded in e-COST, the COST Office cannot be held responsible for discrepancies revealed in the items reported. Should the COST Office identify non-eligible expenses in the Action's financial reports, the Grant Holder will be notified - these non-eligible expenses will then be removed from the report and an updated version will then need to be signed and re-submitted. In cases where the Financial Reports presented by the Action reveal discrepancies, the COST Office reserves the right to adjust the payments accordingly at any time during the Action's lifetime and/or to recover the relevant amounts.

The following reports must be submitted by the Grant holder in line with requirements set out in the Action Grant Agreement:

- **European Commission Financial Report (ECFR):** within the CGS, the ECFR forms part of the COST reporting requirements to the European Commission. This report needs to be submitted by the Grant Holder to the COST Office before 15 January of every year. The ECFR must be signed by the financial or the legal representative of the Grant Holder. 2 original signed sets of the document must be sent by post to the COST Office. In cases where the Grant Holder wishes to request the second payment at the same time as the ECFR is due, it is possible to submit an Intermediate Financial Report (IFR) which will satisfy the requirements for both the processing of the second payment and the reporting requirements of the European Commission. The reporting cut-off date on the report must be 31 December of the same calendar year as the grant period start date.
- **Intermediate Financial Report (IFR):** to be submitted in order to request the second payment. The IFR must be signed by hand by the financial or legal representative of the Grant Holder. 2 original signed sets of the document must be sent by post to the COST Office. An IFR can satisfy the requirements for both the processing of the second payment and the reporting requirements of the European Commission (see above).
- **Yearly Financial Report (YFR),** due within 60 calendar days of the relevant grant period end date. Payments linked to the following grant period cannot be processed unless the YFR from the previous grant period is finalised and approved by the COST Office. It must contain only finalised and paid claims. The YFR must be signed by the Financial or Legal Representative of the Grant Holder, and by the MC Chair (or the MC Vice Chair if the MC Chair is affiliated to the Grant Holder). 3 original signed sets of the document must be sent by post to the COST Office. Together with the YFR, the Grant Holder must also provide both Financial Rapporteur statements – both of which must also be signed by hand (The Financial Rapporteur statements can be sent electronically to the COST office).

2.5.4 Publication and dissemination tasks of the Grant Holder

The Grant Holder must assist the Action with production of its publications and website as defined in section 8.

2.6 Other Expenses Related to Scientific Activities

Other Expenses Related to Scientific Activities (OERSA) refers to banking fees or charges incurred by the Grant Holder when processing the payment of eligible expenses. Such expenses must be justified and must be accompanied by a proof of payment showing that these expenses have in fact been incurred. In exceptional circumstances, an Action may need to incur expenses outside of the remit of the eligible expenses detailed in this document. In such case, expenses can be claimed and classified under the category of OERSA only after prior approval is attained from the COST Office.

2.7 Action Grant Agreement – Non-eligible expenses

1. Identifiable Indirect taxes and duties, including Value Added Tax (VAT); In general, airport taxes are not real taxes in the sense of tax law but a fee for a service delivered by a public or semi-public body in charge of a (public) service, such as airports. In this case the airport taxes imposed by these authorities may be considered a fee and can be therefore considered eligible;
2. Provisions for possible future losses or charges and for doubtful debt;
3. Expenses related to any interest or duties;
4. Unnecessary or ill-considered expenses;
5. Marketing, sales and distribution expenses, not directly related to the Action;
6. Expenses incurred or reimbursed from other sources in respect of another project;
7. Exchange rate losses, expenses related to return on capital.

COST is financed by the EU through a budget from FP7 for research, technological development and demonstration activities. COST has been implemented since 2003 by the European Science Foundation (ESF), as implementing agent, through a Grant Agreement signed with the European Commission and following the Memorandum of Understanding between the ESF and the CSO. Therefore, de facto, COST rules and regulation, as define in the Grant Agreement and in the COST Vademecum must be respected since they fall under the EU Regulation (Financial Regulation).

VAT is therefore a non-eligible expense in the frame of the COST Grant System. This implies that, despite the fact that Action Grant Holders are subject or not to VAT, it can never be claimed nor reimbursed using COST funds. VAT must be paid using other sources else than COST Funds.

The Grant Holder must consult with the COST Office in cases where there is doubt about the eligibility of specific expenses or operations.

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COST supports different types of meetings as part of its Networking Tools. The following provisions apply to meetings organised by the Action:

1. Meetings must be held in a Participating COST Country, preferably at the premises of Action's Participants institutions;
2. Meetings held in NNC and IPC are not eligible for COST funding (at the exception of Dissemination meetings as defined section 3.5);
3. The MC members (or Core Group or the MC Chair on behalf of the MC) determine amongst eligible participants, those entitled to reimbursement.

3.1 MC meetings

MC Meetings should not last more than one full day. The COST Office representatives, the DC Rapporteur and all MC Members are automatically invited to MC Meetings. The purpose of MC meetings is to coordinate and organise the Action's scientific and networking activities in line with the objectives specified in both the MoU and the approved Work and Budget Plan. MC meetings and Working Group meetings should take place at the same time as Working Group meetings / Action Conferences to consolidate travel costs.

3.1.1 Participants eligible for reimbursement

1. Up to two MC Members (or their substitutes) per Participating COST Country. Within 12 months of the CSO approval of an Action, a nominated MC Member (or substitute) is eligible to be reimbursed for their attendance at an MC meeting. If the country has not yet approved the MoU but is in the process of doing so and therefore joining the Action (this will appear as under intention of the COST Action website page), then the corresponding MC Member (or the substitute) is also eligible to be reimbursed.
2. Action DC Rapporteur;
3. MC Observers from approved NNC, up to two per NNC and limited to one per institution;
4. MC Observers from approved European RTD Organisations limited to one per institution;
5. Other Action Participants from Participating COST Countries (WG members).

3.1.2 Participants not eligible for reimbursement

1. MC Observers from approved IPC and from IO and EC;
2. Invited Speakers;
3. Any other participants not specifically mentioned as being eligible.

3.2 Working Group meetings and other COST Action meetings

Working Group Meetings focus their work on the scientific and/or technological objectives of the Action as defined by the MC in line with the Action MoU as detailed in section 1.3.5.

The MC may approve the organisation of "other meetings" as detailed in section 1.3.9 (e.g. meeting related to finalize the Action publications) composed of MC Members, WG Members serving the objectives of the Action in line with the MoU.

3.2.1 Participants eligible for reimbursement

1. Any Action Participants from Participating COST Countries;
2. Any Action Participants from approved NNC Institutions;
3. Any Action Participants from approved European RTD Organisations;
4. Invited Speakers from Participating COST Countries;
5. Up to four Invited Speakers from a non-participating COST Country or Cooperation State or affiliated with any institution located in any non-approved NNC institution or any non-approved IPC institution.

3.2.2 Participants not eligible for reimbursement

1. MC Observers from approved IPC institutions and from approved IO and EC;
2. Any other participants not specifically mentioned as being eligible;

3.3 Core Group meetings

The MC may establish a Core Group composed of a subset of MC Members, which serves to prepare MC decisions for the purpose of steering the overall strategy and objectives of the Action in line with the objectives set out in the Action MoU.

3.3.1 Participants eligible for reimbursement

1. Any Action Participants from Participating COST Countries;
2. Any Action Participants from approved NNC Institutions;
3. Any Action Participants from approved European RTD Organisations;

3.3.2 Participants not eligible for reimbursement

1. MC Observers from approved IPC institutions and from approved IO and EC;
2. Invited Speakers;
3. Any other participants not specifically mentioned as being eligible.

3.4 Action workshop / Action conference

This type of activity must be organised or co-organised by the COST Action, and is open to the scientific community to showcase the Action's activities. In the role of co-organiser, the COST Action must be fully integrated into the scientific programme and must have direct involvement in the general organisation of the event. This implies that Action Participants need to be speakers and/or session chairs. Moreover, the following principles apply:

1. COST must be visible as co-organiser on the event specific website;
2. COST must be visible as co-organiser on the events publication/dissemination material;
3. Participation of ESR is particularly encouraged;
4. Co-hosting with MC/WG meeting is possible and encouraged to consolidate travel costs;
5. Dissemination requirements regarding conferences as defined in section 8 must be followed.

3.4.1 Participants eligible for reimbursement

1. Any Action Participants from Participating COST Countries;
2. Any Action Participants from approved NNC Institutions;
3. Any Action Participants from approved European RTD Organisations;
4. Invited Speakers from Participating COST Countries;
5. Up to four Invited Speakers from a non-participating COST Country and Cooperation State or affiliated with any institution located in any non-approved NNC institution or any non-approved IPC institution.

3.4.2 Participants not eligible for reimbursement

1. MC Observers from approved IPC institutions and from approved IO and EC;
2. Any other participants not specifically mentioned as being eligible.

3.5 Dissemination meeting: attendance to other conferences

Attending meetings or conferences not organised by the COST Action might be relevant for the Action objectives, either to disseminate the Action's activities, or to collect information to be further disseminated amongst the Action's members. In this case:

1. In case the meeting is not included in the approved Work and Budget Plan, then participation must be pre-approved by the MC and by the COST Office Science Officer. The DC Rapporteur shall be informed prior to the conference;
2. Participation should preferentially be at European Conferences;
3. A maximum of two participants per grant period are eligible for reimbursement at dissemination meetings. Repeat attendance by the same person across grant periods must be avoided;
4. The attendee(s) must be a Speaker listed in the official programme of the conference;

5. Subject of the speech must be the COST Action;
6. A contribution of maximum EUR 500 can be reimbursed (in case where meals and accommodation are included in the conference fee, the participant reimbursement will have to be adapted accordingly);

3.5.1 Participants eligible for reimbursement

1. Any participants from Participating COST Countries;
2. Any participants from approved NNC Institutions;
3. Any participants from approved European RTD Organisations.

3.5.2 Participants not eligible for reimbursement

1. MC Observers from approved IPC institutions and from approved IO and EC;
2. Any other participants not specifically mentioned as being eligible.

3.6 Final workshop or conference

The Action MC can decide to organise a final workshop or conference serving to highlight and showcase the achievements of the Action. It should be the last activity of the Action and must be occur before the end of the last grant period. It serves to disseminate the Action achievements. In duly justified exceptional cases, and following a formal request for approval from the COST Office, the final workshop or conference may take place after the official Action's end date. The request for approval of this final event must be scientifically justified and submitted at least 6 months before the end of the final grant period. When under consideration, the request for an extension of the Action's duration will need to be formally approved by the COST Office, the DC and the JAF. Following such an approval, a formal amendment containing the augmented end date of the respective grant period will need to be signed by both the Grant Holder and the COST Office.

3.6.1 Participants eligible for reimbursement

1. Any participants from Participating COST Countries;
2. Any participants from approved NNC Institutions;
3. Any participants from approved European RTD Organisations;
4. Up to 4 Invited Speakers.

3.6.2 Participants not eligible for reimbursement

1. MC Observers from approved IPC institutions and from approved IO and EC;
2. Any other participants not specifically mentioned as being eligible.

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To participate in COST Action meetings, participants eligible for reimbursement may receive financial support for their travel, meals and accommodation expenses, following MC approval.

Participants eligible and entitled for reimbursement 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 meeting;
3. Arrive and depart as close as possible to the beginning/end dates of the meeting.

In order to receive the payment, the eligible and entitled participant must:

1. Register their bank detail prior to the meeting on e-COST at <https://e-services.cost.eu>;
2. Sign the meeting attendance list on each day that they attend the meeting;
3. Declare that he/she will not receive any similar reimbursement or allowance from a third party;
4. Submit a duly completed and signed by hand Travel Reimbursement Request (TRR) form within 30 calendar days from the end date of the approved meeting;
5. Submit readable copies of all invoices/receipts. Original invoices/receipts must be kept by the claimant until 31 May 2019 (5 years after the end of the Seventh Framework Programme) for audit purposes;

All payments are made in EUR, at an exchange rate automatically calculated by e-COST at the meeting end date. Any fees related to returned or refused payments due to incorrect bank account information provided by the participant may be subtracted from their reimbursed amount. For audit purposes, the COST Office reserves the right to contact the participant's institutions to enquire about instances where potential double funding is suspected

The default flat rate expense amounts are EUR 120 for each eligible night and EUR 20 for each eligible meal. Before sending the invitations from e-COST, the MC may decide to apply a different ceiling on the applied flat rates for accommodation expenses and/or meal allowance never exceeding the default flat rate. In these cases, all participants must be notified before receiving their formal invitation. The same flat rates must be afforded to all participants for every night and every meal of the meeting in question. The MC may also decide to cap the total amount to be reimbursed. In this case, all participants must be informed before receiving their invitation, and the same amount must be afforded to all participants. The above-mentioned flat rate rules for accommodation and meals reimbursements must be respected.

Additional information/help about reimbursement rules while attending Action meetings, conferences or training school can be in Annex III.

4.1 Eligible expenses

If, due to Force Majeure (sickness, strike, delays, natural disaster, etc.) before or during the meeting, the participant needs to cancel/change his/her travel ticket and hotel reservation, then any non-refundable amount can be considered as being eligible for reimbursement. The non-refundable amount (face value and net of VAT) must be claimed by submitting together with the TRR a statement from the service provider (airline company, hotel etc.) mentioning the non-refundable amount together with a reasonable justification (medical certificate in case of sickness). Grant Holders shall submit for approval to the COST Office the justifications provided by the participant, together with the supporting documents before processing the reimbursement.

4.1.1 Accommodation (including breakfast)

1. This is based on flat rates only (at a maximum of EUR 120 per person per night, including breakfast);
2. Maximum number of nights to be reimbursed equals the number of attended meeting days (as confirmed by the attendee's signatures on the daily attendance list) plus 1 in case the participant arrived the day before the meeting starts;
3. The accommodation expenses must be paid directly by the participant. Accommodation expenses paid centrally by the Grant Holder or by the Local Organiser are non-eligible;

4. When sharing the hotel room with another participant entitled to reimbursement, only one participant should claim the reimbursement of the nights.

4.1.2 Meals

1. This is based on flat rates only (at a maximum of EUR 20 per person per meal);
2. Meals provided by other sources must be deducted from the number of meals to be reimbursed.

4.1.3 Travel expenses

In order to be reimbursed, participants must submit as supporting documentation their travel tickets (original or legible copies) and/or the related invoice/receipts.

For flight tickets, the provided justification must include the ticket price,, the name of the passenger, , the dates of travel, departure and arrival times and the booking class – essentially, evidence of the full costing and itinerary of the journey.

For all other eligible modes of transport as detailed in this section (section 4.1.3 and 4.1.4), it is understood that in certain instances, evidence of travel and the subsequent costs such as taxi receipts and certain train/bus/metro tickets do not contain the name of passengers and/or the full itinerary. In every instance, every receipt provided must demonstrate the nature of the journey, the date, the time (where timing is necessary to evidence eligibility) of the travel and the full cost of the ticket.

Travel to and from countries other than the approved meeting destination and the country where the participant is residing (country of residence be the country where the participant is registered on their e-COST profile) must be explained in the justification box and must be accompanied by a comparative price quote evidencing that the purchased ticket is cheaper or equal to the value of a return ticket from the country of residence of the participant to the meeting.

The following conditions apply to the different modes of eligible travel expenses:

1. Airplane

- Only economy class tickets are eligible for reimbursement;
- Air tickets exceeding EUR 1 200 require prior approval from the COST Office;
- Seat reservations and luggage transportation costs are eligible;
- Administrative fees charged by travel agencies are eligible.

2. Train or Bus

- First and second class tickets are eligible for reimbursement;
- Supplements for fast trains and sleepers are eligible expenses.

3. Car

Car travel is limited to a maximum distance of 2 000 km and is reimbursed as follow:

- At EUR 0.20 per km, when a participant entitled to reimbursement is travelling alone;
- At EUR 0.30 per km, when additional participant entitled to reimbursement are travelling in the same car. Only the driver shall be reimbursed. The names of the passengers must be mentioned on the remarks section of the TRR submitted by the driver.
- Proof of distance showing the travelled route beginning at the place of origin to the approved meeting venue must be submitted along with the TRR by means of a printout from a route planner web services. Parking costs are eligible for reimbursement and can be found under Local transport expenses.

4. Ferry

In order to be reimbursed, participants must submit as supporting documentation: the tickets (and the related invoice if the price is not indicated on the ticket) mentioning the name of the passenger, the

price, dates of travel, departure and arrival times and the booking class – essentially the full itinerary of the journey.

4.1.4 Local transport expenses

Local transport expenses are any transport costs (including public transport - shuttle, buses, trains, metro, tramway - taxis, car, parking costs and ferry costs) incurred travelling between the following points:

- Home to Airport / train station;
- Airport / train station to meeting venue / hotel;
- Hotel to meeting venue;
- Meeting venue to hotel;
- Meeting venue / hotel to airport / train station;
- Airport / train station back to home.

The rules concerning the reimbursement of public transport expenses - shuttle, buses, trains, metro, tramway - are as follows:

- If the amount claimed is less than EUR 25, no tickets are required to be submitted for reimbursement but the journey(s) must be detailed on the TRR (for both the outbound & inbound journeys);
- If the claimed amount exceeds EUR 25, receipts justifying the total amount claimed must be provided. All receipts must display the amount and the date that the expenses were incurred. In this case, a detailed journey must be provided with the tickets.

Action Participants are limited to use taxis:

- When no other means of public transport is available;
- For early departures (travel departure before 7 am) or late arrivals (travel arrival after 10 pm);
- For up to EUR 80 for the entire travel when the above conditions have been met.

Car costs can be reimbursed according to the rules stated in section 4.1.3. Parking expenses can be reimbursed based on receipt only.

4.1.5 Other eligible expenses

1. Short term visa fees relevant to attending the approved Action meeting. Any claimant must validate the amount by producing a supporting document (e.g. a receipt/stamp from the embassy/consulate issuing the visa which clearly shows the amount paid and the conditions of the visa);
2. An Extra night accommodation (when duly justified and approved by the COST Office prior to the participant incurring the expense);

4.2 Non-eligible expenses

1. Registration, honorarium or lecture fees;
2. Transportation expenses associated with obtaining the short term visa;
3. Health related expenses, life and medical insurance;
4. Travel cancelation and luggage insurance;
5. Overnight stay during a trip by car, fuel costs, road tolls and car rental costs;
6. Wi-Fi, telephone, internet and minibar consumption;
7. Printing costs, postage;
8. Regional or national taxation fees, stamp duty expenses.

5. Local Organiser Support

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Meetings, Workshops, Conferences and Training Schools are organised in accordance with the procedures presented in their dedicated sections of this Vademecum. The costs related to the organisation of a meeting are supported by the Local Organiser. Subject to the availability of funding and MC approval, the local organiser can nevertheless request support from COST as a contribution to the total meeting budget. This contribution is called Local Organiser Support (LOS) and shall be taken directly from the Action budget. LOS is applicable to COST Action meetings, Workshop and conferences as mentioned section 3 and COST Action Training Schools as mentioned section 7.

LOS can only be paid to an institution bank account, and never to a personal bank account.

5.1 LOS process

1. Before the meeting

In order to request a contribution from the Action budget to support part of the costs related to the organisation of an approved meeting/training school, the Local Organiser / MC Chair has to first provide the Grant Holder with the number of estimated participants per day, their contact details and if possible, a detailed draft programme of the event (including the names of the session chairs and of the Invited Speakers). Based on the number of estimated participants provided by the Local Organiser / MC Chair and subsequently encoded by the Grant Holder into e-COST will automatically calculate an estimation of the LOS grant.

The MC Chair will receive notification of the requested amount and, on behalf of the MC, will have the possibility to review the request in e-COST and to pre-approve the amount. Following this pre-approval, a Grant Letter stating the estimated amount will be sent to the Local Organiser.

2. After the meeting

After the meeting, the Local Organiser must send the signed attendance list electronically to the Grant Holder. The Grant Holder will encode into e-COST the final number of confirmed participants per day (as checked against the signatures on the attendance list). Once the number of confirmed participants is encoded into e-COST, the Local Organiser must complete and submit the Local Organiser Support claim using e-COST and must send all the supporting documents (the Scientific Report and any other supporting documents as defined in section 5.2) and the original attendance list.

Following the submission of the claim by the Local Organiser, the MC Chair will receive a request for post approval. The MC Chair, at this point, can either approve the final LOS amount or request additional information from the Local Organiser.

If approval is afforded by the MC Chair, the Grant Holder will receive instruction to process the LOS payment. In case the request submitted by the Local Organiser doesn't fulfil the eligibility criteria defined above, then the Grant Holder has the possibility to request to the Local Organiser to modify his request accordingly.

5.2 LOS calculation

The LOS is a contribution to the overall eligible expenses related to the organisation of a meeting, series of meetings or events. The Local Organiser can choose between 2 modalities for the reimbursement of expenses.

1. The first modality enables the Local Organiser to claim a lump sum of 20 EUR per participant, per each day of the approved event attended as evidenced by the participants' signature on the daily attendance list. The participants' signature can be counted towards the LOS claim regardless of their reimbursement eligibility status;
 - Up to a maximum LOS of EUR 5 000;
 - No invoices are required.
2. The second method is based on actual invoices. In such a situation:
 - The maximum reimbursement is EUR 10 000;

- The justification of expenses and invoices must be attached with the file;
- A final breakdown of expenses using the LOS breakdown template is required.

In order to reduce the overall travel costs, an Action may decide to host multiple meetings during one event. In this case:

- The LOS can be reimbursed based on invoices only;
- The overall contribution cannot exceed EUR 10 000 (considering all co-located meetings together as requiring one LOS).

A COST Action may wish to co-host a meeting with another COST Action, in such cases:

- Only one single claim can be submitted to one of the related Actions;
- The overall contribution cannot exceed EUR 10 000 overall (considering all co-located meetings together as requiring one LOS).

5.3 LOS eligible expenses

The following expenses are considered eligible as LOS:

1. Rental of room & technical equipment;
2. Photocopying, printing of programmes, book of abstracts, proceedings, etc.;
3. Phone, fax, mailing for announcements;
4. Support of administrative cost - up to a maximum 15% of the total LOS amount claimed;
5. Field trips if relevant to the topic of the meeting and scientifically justified;
6. Coffee breaks and light refreshments including light lunches (such as sandwiches), which will have to be deducted from the daily allowance of the reimbursed participants;
7. One single networking meal (lunch or dinner) for the entire meeting duration, which will have to be deducted from the daily allowance of the reimbursed participants;
8. Consumables purchased for Training Schools (as defined in section 7) such as laboratory materials, rental of scientific equipment. The quantity purchased shall be coherent with the number of participants.

In case of a publication being financed under the LOS; the publication shall be arranged directly by the Local Organiser. It must follow the requirements as defined section 8.

5.4 LOS non-eligible expenses

The following expenses are not eligible for support to the Local Organiser:

1. VAT and any other indirect taxes;
2. Any meal exceeding the single meal limit as defined above;
3. Hotel group reservations;
4. Translation and editing costs;
5. Transportation expenses without relevant scientific justification;
6. Purchase of technical equipment and IT devices (e.g. Mobile phones, computers, printers...);
7. Any additional expenses not listed in the list of eligible expenses.

6. Short Term Scientific Missions

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6.1 STSM - rules

Short Term Scientific Missions (STSM) are aimed at supporting individual mobility and at strengthening the existing networks and fostering collaborations by allowing scientists to visit an institution or laboratory in another Participating COST Country or an approved NNC institution or an approved IPC institution. A STSM should specifically contribute to the scientific objectives of the COST Action, while at the same time allowing applicants to learn new techniques or gain access to specific instruments and/or methods not available in their own institutions;

The evaluation of STSM applications is performed by the MC and must avoid any potential conflict of interest. The MC may formally delegate the evaluation of STSM applications to an STSM coordinator or committee (refer to section 1.3.8). The assessment criteria defined by the MC should be communicated in advance to all potential applicants.

The selection of applicants is based on the scientific scope of the STSM application that must be in line with the Action objectives. Necessary geographical and gender balance issues are to be taken into consideration and applications from ESR should be privileged.

STSM applicants must be engaged in a research programme as a postgraduate student or postdoctoral fellow, or be employed by or officially affiliated to an institution or legal entity. This institution is considered as the Home institution. Institutions may be public or private entities.

Possible STSM scenarios are:

Home Institution	Host Institution
From a Participating COST Country or Cooperation State	To another Participating COST Country or Cooperation State
	To an approved NNC institution
	To an approved IPC institution
	To an approved Specific organisation
From an approved NNC institution	To a Participating COST Country or Cooperation State
From an approved European RTD Organisation	To a Participating COST Country or Cooperation State

During an STSM neither the MC, nor the COST Office nor the Grant Holder may be considered as an employer. Grantees must make their own arrangements for all health, social, personal security and pension matters.

Standard STSMs need to take place according to the following rules:

1. Be a minimum duration of 5 days;
2. Be a maximum duration of 90 days;
3. Needs to be carried out in their entirety within a single grant period and within the Action's lifetime.

Specific provisions had been adopted by the CSO to foster the participation of ESR (COST 295/09). ESR may extend the duration of the STSM beyond the 90 days; in this case, ESR STSM must take place according to the following rules:

1. Be a minimum duration of 91 days;
2. Be a maximum duration of 180 days;
3. Needs to be carried out within their entirety within a single grant period and within the Action's lifetime.

6.2 STSM - financial support

A STSM grant is a fixed contribution based on the budget requested by the applicant and the evaluation of the application by the MC Chair /STSM Coordinator or Committee. The aim of this grant is to support the costs associated with the exchange visit. This grant will not necessarily cover all expenses; it is intended only as a contribution to the travel and subsistence costs of the participant.

The calculation of this contribution for a STSM must be based on the following rules:

- The reimbursement rate per day is EUR 160 maximum;
- Up to EUR 500 may be attributed for the travel expenses;
- A maximum EUR 2 500 in total can be afforded to the grantee.

The calculation of this contribution for an ESR STSM (for a duration of more than 91 days) must be based on the following rules:

- The reimbursement rate per day is EUR 160 maximum;
- Up to EUR 500 may be attributed for the travel expenses;
- A maximum EUR 3 500 in total can be afforded to the grantee.

In all cases the MC can approve differentiated country rates for subsistence per day, based on the cost of living in each respective country.

6.3 STSM - process

1. Before the STSM

In order to receive a STSM grant, the applicant must:

- Obtain the written agreement of the host institution, before submitting an application;
- Complete the online application form (see <https://e-services.cost.eu/stsm>);
- Send the completed file as e-mail attachment together with the necessary supporting documents (CV, full work plan, list of publications, motivation letter, letter of support from the home institution etc.) to the STSM host institution and to the MC Chair or the STSM coordinator.

Assessment and Grant Letter:

- The MC (or STSM Coordinator or Committee) will perform the scientific and budgetary assessment of the applications considering the Action objectives and define an acceptable funding level;
- Once approved by the MC (or STSM Coordinator or Committee), the Grant Holder needs to receive the approval and then send a grant letter generated from e-COST to the applicant.

2. After the STSM

The grantee is required to submit a short scientific report to the host institution (for information) and MC Chair (or to the STSM coordinator) for approval within 30 days after the end date of the STSM containing:

- Purpose of the STSM;
- Description of the work carried out during the STSM;
- Description of the main results obtained;
- Future collaboration with the host institution (if applicable);
- Foreseen publications/articles resulting from the STSM (if applicable);
- Confirmation by the host institution of the successful execution of the STSM;
- Other comments (if any).

The failure to submit the scientific report within 30 days will effectively cancel the grant;

The MC Chair (or the STSM coordinator) is responsible for approving the scientific report and informing the Grant Holder that the STSM has been successfully accomplished;

After receipt of the approval by email, the Grant Holder will execute the payment of the grant.

6.4 Reciprocal STSM (RSTSM) – rules

The aim of the RSTSM is to enhance the potential impact of global networking and foster knowledge creation and exchange between scientists in COST Actions with host institutions in IPC that benefiting from a reciprocal agreement with COST (Argentina, Australia, New Zealand, South Africa). The reciprocal agreement (COST 4115/13) is based on the ascertained mutual benefit to network (in

particular to the benefit of ESRs). Each institution, with the signature of a reciprocal agreement with the COST Office, has allocated dedicated funds to support the participation of researchers from their countries in COST Actions.

For Actions with an approved IPC Institution in a country benefiting from a reciprocal agreement, the following scenarios are possible:

Home Institution	Host Institution	Financial Support
From a Participating COST Country	To an approved IPC Institution in country benefiting from a reciprocal agreement	Supported by the COST Office directly
From an approved IPC Institution in a country benefiting from a reciprocal agreement	To an institution in a Participating COST country	Supported by the implementing agent in the IPC benefiting from a reciprocal agreement

RSTSM are implemented by the COST Office as a special kind of STSM funded in addition to the Action's Budget and managed centrally by the COST Office.

6.5 RSTSM - financial support

A RSTSM grant is a fixed contribution based on the budget requested by the Applicant and on the evaluation of the application by the COST Office. This grant will not necessarily cover all expenses and only contribute towards travel and subsistence.

Financial contributions calculation rules for RSTSM in Australia and New Zealand:

- The reimbursement rate per day is EUR 160 maximum;
- Up to EUR 1 900 may be attributed for the travel expenses;
- A Maximum EUR 3 000 can be afforded to the grantee.

Financial contributions calculation rules for RSTSM in South Africa:

- The reimbursement rate per day is EUR 160 maximum;
- Up to EUR 1 400 may be attributed for the travel expenses;
- Maximum EUR 2 500 can be afforded to the grantee.

Financial contributions calculation rules for RSTSM in Argentina:

- The reimbursement rate per day is EUR 160 maximum;
- Up to EUR 1 000 may be attributed for the travel expenses;
- Maximum EUR 2 500 can be afforded to the grantee.

6.6 RSTSM - process

The application process for the applicant from a Participating COST Country is as follow:

1. Before the RSTSM

- Obtain written agreement from the host institution, before submitting an application;
- Complete the online application form (see <https://e-services.cost.eu/stsm>);
- Send the completed file as e-mail attachment together with the necessary supporting documents (CV, full work plan, list of publications, motivation letter, letter of support from the home institution etc.) to the MC Chair;
- The MC Chair (or the MC Vice Chair in case the application is made by the MC Chair) must forward the application and the supporting document to the COST SO along with a statement of support indicating the benefit to the Action;
- Once approved by the COST SO, the applicant will received a Grant Letter specifying the amount granted for the RSTSM;

2. After the RSTSM

The grantee is required to submit a short scientific report to the host institution, to MC Chair and to the COST Office SO within 30 days after the end date of the RSTSM containing:

- Purpose of the RSTSM;
- Description of the work carried out during the RSTSM;
- Description of the main results obtained;
- Future collaboration with the host institution (if applicable);
- Foreseen publications/articles resulting from the RSTSM (if applicable);
- Confirmation by the host institution of the successful execution of the RSTSM;
- Other comments (if any).

The failure to submit or a submission exceeding 30 days will effectively cancel the grant.

The MC Chair is responsible for approving the scientific report. MC Chair approval and the scientific report must be sent by the MC Chair to the COST Office SO.

After reception of the approval by email, the COST Office will execute the payment of the grant.

7. Training Schools

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7.1 Training schools – rules

Training Schools aim at widening, broadening and sharing knowledge relevant to the Action's objectives through the delivery of intensive training on a new and emerging subject. They can offer familiarisation with unique equipment or expertise that are typically to the benefit of ESR, although not exclusively. They are not intended to provide general training or education.

COST support covers the organisation costs of the Training School (see section 5), as well as the participation of trainees and trainers (travel, accommodation and meal expenses only). Lecture fees can never be paid to Training Schools Trainers using COST funds. The following general provisions apply when organising a Training School:

1. A ratio of at least 3 trainees to 1 trainer should be respected unless justified;
2. Training Schools should last between a minimum of 3 days and a maximum of 15 days;
3. Training School must be held in a Participating COST country or in NNC institutions;
4. No lecture fees can be paid to trainers;
5. A reasonable country balance should be respected concerning the trainees;
6. The MC members define amongst the eligible participants (trainers and trainees) those who are entitled to be reimbursed

Trainers eligible for reimbursement:

1. Trainers from Participating COST countries;
2. Trainers from approved NNC institutions;
3. Trainers from approved IPC institutions;
4. Trainers from approved European RTD Organisation;
5. Maximum 4 Invited Speakers.

Trainers not eligible for reimbursement:

1. Trainers from approved International Organisation and European Commission;
2. Any other trainers not specifically mentioned as being eligible.

Trainees eligible for reimbursement:

1. Trainees from COST countries;
2. Trainees from approved NNC institutions;
3. Trainees from approved European RTD Organisations.

Trainees not eligible for reimbursement:

1. Trainees from approved IPC institutions;
2. Trainees from approved International Organisation and European Commission;
3. Any other trainees not specifically mentioned as being eligible.

7.2 Training schools Trainers – financial support

Trainers entitled to reimbursement are reimbursed according to the rules applicable to Meetings participants (see section 4). Other forms of reimbursement are considered ineligible.

7.3 Training schools Trainees – financial support

The MC of the Action decides the financial contribution for Trainees attending a Training School. This decision must be based on the following rules:

- The reimbursement rate per day is EUR 160 maximum;
- Up to EUR 300 may be attributed for the travel expenses;
- A maximum grant of EUR 1 500 can be awarded;
- Grant for Trainees can vary depending on the country of the Trainees (e.g. Domestic, near countries, far countries);
- Prior the Training School, the trainees must register on e-COST: <https://e-services.cost.eu>.

Before the respective Training School takes place, each trainee entitled to reimbursement must receive a Grant Letter, mentioning the dates and the place of the event and the fixed amount of the Grant.

After the Training School, a 'Payment Request Form' mentioning the dates and the place of the event, the fixed amount of the Grant, and the banking information of the trainees must be signed by the trainees, in order for the payment to be processed.

8. Dissemination and Publications

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Disseminating and transferring knowledge is a key value to COST, and the use of results by policy-makers, industry and society is vital. COST Actions are therefore encouraged to use all means to communicate their findings to the European research community and to society at large.

COST provides financial support for the production of dissemination tools and publications such as books (hard copy or electronic), reports, journal articles, brochures, flyers and other types of publication, including in electronic format e.g. DVDs and CD-ROMs, as well as other outreach and dissemination activities in line with the COST Rules for Participation in and Implementation of COST Activities (COST document COST 4112/13) and COST Communication Plan (COST document 4115/12). In order to be eligible for funding, publications must be authored by at least by 2 participants from 2 different Participating COST Countries. Publications and dissemination activities must also reflect the MoU and must be in line with the Action's objectives.

Wherever possible, and compatibly with applicable intellectual property regulations, publications financed by COST should be produced and disseminated under Open Access principles, as specified in the COST Implementation Rules (COST 4112/13). Guidance on how to achieve this in practice and on the support available from COST in this sense can be obtained by contacting the COST Communication and Conference Unit (publications@cost.eu).

COST strongly recommends e-publications or the use of environmentally friendly materials such as chemical free, non-chlorine paper or e-books and print-on-demand solutions.

The publications and dissemination tools usually normally produced by Actions fall into two categories:

1. Dissemination and publications produced during an Action's lifetime: these are funded directly by the COST Action budget and are paid by the Grant Holder; guidelines and procedures are described in section 8.1;
2. Final Action Publication: this is produced at the end of an Action's lifetime; it is funded directly by the COST Office through a dedicated budget line and it is paid centrally by the COST Office; guidelines and procedures for this type of publication are described in section 8.2.

Please note: when it comes to publication and dissemination tools, the first point of contact for the Action is always the relevant COST Office SO, who remains the contact person throughout the process.

8.1 Action Publication and Dissemination Activities

The selection of an Action's publication and dissemination activities is the responsibility of the MC. Publication and dissemination activities must be approved by the MC and must be in line with the Action's objectives.

Publication and dissemination activities undertaken by Actions during their lifetime do not require the active involvement of the COST Office. The relevant COST Office SO must however be informed of such activities and should receive two copies of every printed or other hard copy publication, and/or information about other forms of dissemination work (for example a publication file in case of a digital-only publication, or a link to an online digital resource). Hard or digital copies of publications will be used by the COST Office to disseminate the publication further via relevant dissemination channels managed by COST.

8.1.1 Eligible costs

COST funding can cover expenses for the production and distribution of a publication by a printing house or for the creation and/or distribution of alternative dissemination tools.

With regard to the latter, the following expenses can be considered as eligible (excl. VAT):

1. The purchase and distribution of a fixed number of copies of high-quality publications produced by a renowned publisher (usually books or journals);
2. Proofreading, editing, production and distribution costs relating to the production of publications and dissemination tools;

3. Multimedia material production costs (e.g. CD-ROMs, DVDs and video products);
4. The production of proceedings from scientific conferences and meetings;
5. The production of dissemination materials other than publications (e.g. flyers, posters, postcards);
6. Website development (see below for special provisions).

Please note that some costs relating to the production of the above materials, such as graphic design and translation, are not eligible costs.

Publication and dissemination activities are subject to the following general provisions:

1. A dissemination strategy must be included in the annual W&BP (refer to section 2.4) of every grant period;
2. Any financial commitments for publication and dissemination activities must only be made for activities taking place/being delivered in the current grant period.

Special Provisions for Website Development

Websites may vary considerably in scope and content and allocation of funds must be clearly justified with respect to Action objectives. Generally, costs relating to Action websites should be lower than EUR 4500 for the first year of the Action and lower than EUR 1500 for the following years. Derogation from this guideline should be justified in writing to the relevant COST SO, who will consult with the COST Communications Office regarding the appropriateness of the expense.

COST Action websites must also display the following items:

1. The COST logo, ESF logo and EU logo, appearing prominently on the Action website homepage and in the footer or header of every page (see also section 8.3 - Checklist for publications);
2. A link to the relevant COST Office website page describing the Action ;
3. A downloadable version of the Action's MoU;
4. A link to relevant COST guidelines as published on the COST website (please do not post any official documents/templates/guidelines directly on the Action website; links should point to official versions hosted on the COST website as such documents are sometimes subject to change);
5. Names and contact information for the MC Chair and Vice Chair, and the COST Science Officer in charge of the Action. These must be kept up to date. For updated versions please refer to the relevant Action page on the COST website;
6. There must be only one website per Action, and one single URL and domain registered it (i.e. no multiple domain registrations)².

8.1.2 Step by step guide

Step 1 - MC Decision

The selection of an Action's dissemination tools and publications is the responsibility of the Management Committee. An Action's publication and dissemination strategy must be reflected in the Work and Budget plan for every Grant Period. Pre-approval by the MC must also be sent to the Grant Holder.

Step 2 - Choice of Publisher

The MC Chair needs to provide an offer for production and distribution. The offer must be addressed to the Grant Holder, which will be responsible for the payment at the end of the process. If the total price exceeds EUR 3000 excluding VAT, the MC must collect 2 offers from 2 different suppliers, preferably located in COST Countries. The MC decides on which offer to choose. If applicable (i.e. expense over EUR 3000), the 2 offers received must be archived together with the MC decision by the Grant Holder.

Step 3 - Print Release

Before an authorisation to publish is issued to the publisher, the MC needs to provide the Grant Holder with the following:

1. A final, detailed distribution list;

² All newly-approved Actions must conform to these requirements. Actions that are already running and already have a website should make every effort to comply with these guidelines, and are advised to contact the COST Communications Office if they need support.

2. If a printed publication, an electronic final print proof of the publication with proof of the elements described in section 8.3, 'COST Checklist for Publications'; if in other format, a sample of the final product depending on the format, also featuring the items in section 9.3, 'COST Checklist for Publications' where applicable.

The Grant Holder should also check that a signed Author's Declaration (example available in section 8.3.1) is provided. If all elements are in place, the Grant Holder authorises the production of the publication or dissemination tool.

Step 4 - Distribution and Payment

Once the printed publication or alternative dissemination product has been delivered, the publisher sends the invoice to the Grant Holder for payment. Before paying, the Grant Holder must receive from the MC an approval statement confirming that the payment should be processed, i.e. that the product has been delivered in a satisfactory manner. Once this is received and payment has been issued, the relevant e-COST claim can be finalised and recorded.

8.2 Final Action Publication

8.2.1 General principle

Final Action Publications (FAP) are limited to one publication per Action and maximum of EUR 10000 in total (excl. VAT). They are ordered and paid directly by the COST Office. Requests for financial contribution to FAP need to be received by the COST Office at the latest 6 months before the official end date of the Action. The MC Chair ensures that the invoice for the FAP will reach the COST Office no later than 12 months after the official end date of the Action. Please note that payment of the invoice by the COST Office is only guaranteed once the COST Office has issued a purchase order to the publisher.

The first point of contact for a FAP is always the relevant COST SO. He or she remains the contact person throughout the process. Note however that due to the direct involvement of the COST Publications Office in their production, all communications relating to FAPs should also be copied to publications@cost.eu.

8.2.2 Step by step guide

Step 1 – MC Decision

The selection of a particular format and type of FAP is the responsibility of the MC of the Action. Once the format and type of FAP the Action wishes to produce has been agreed, the MC Chair sends an official request to the relevant SO, with copy to the COST Publications Office (publications@cost.eu). The request must be made no later than 6 months before the end of the Action³, and must include the following items:

- MC Chair title, name, work place, postal address, email address, telephone and fax numbers;
- A statement referring to the MC decision (minutes) on the realisation of publication or dissemination item, including date and location of the meeting and budget allocated;
- Abstract (max 500 characters) of the publication - or description of the final product in case of items other than printed publications;
- Production details regarding the publication or dissemination tool (if hard copy/paper: exact title, expected delivery date, number of pages including cover pages, number of copies to be printed; if in an alternative format: description of contents, technical specifications, format, copies to be printed if applicable, expected dissemination channels/outlets);
- If applicable (usually for physical items), a detailed distribution list;
- An Author's Declaration (example available in section 8.3.1).

³ It follows that an MC decision on the matter needs to be taken well in advance of this deadline.

Step 2 – Recommendation from the COST Office SO

Based on the information received, the Science Officer sends a request for approval of the production of the publication or dissemination tool to the Head of Communication and Conferences.

Step 3 – Validation by the COST Office

If the request conforms to the guidelines for FAPs, the Head of Communications and Conferences (HCC) approves the request, providing feedback on the modality of production of the publication if applicable. Following the HCC's approval, the COST Office issues a reference number to validate the request. This 'COST reference number' (starting with PUB XXXX) must be referred to throughout the whole process.

Step 4 – Offer from Publisher

The MC Chair, with the support of the MC, is responsible for providing an offer for production and distribution and for forwarding it to the COST Communications and Conferences Unit.

If the total price exceeds EUR 3 000 (excluding VAT)⁴, the MC chair, on behalf of the MC, needs to provide offers from 2 different suppliers (preferably European or from a COST Country or Cooperating State), or a justification why only one supplier is possible, and forwards these to the COST Communications and Conferences Unit for approval. Please note that the maximum expenditure for a FAP is EUR 10000.

In the case of printed publications or other types of hard copy publication, the offers should be based on the required number of copies and should include distribution costs and the following information:

- Name of the Publisher, with national reference number
- Title "Offer" (not invoice)
- COST reference number
- Date of the offer
- Title of the publication, ISBN or ISSN Nr, publication year, number of pages
- Number of items to be delivered
- Price per copy
- Expenses for delivery based on the COST distribution list
- Delivery date
- Total price in EUR (excl. VAT For suppliers located outside Belgium; for Belgium, the VAT rate should be indicated separately).

As part of the offer, the publisher should also agree to make a digital version of a part of the publication available free of charge (e.g. Table of Contents, or Introduction chapter), either via the publisher's own website or as a file that can be uploaded on the COST website. A statement to this effect should be included in the offer.

Offers for publications or dissemination tools other than hard copy publications should include detailed technical specifications, information on access conditions and a breakdown of the production costs.

Please note that for practical reasons, offers should be in English. Offers in French and Dutch may also be acceptable in exceptional cases. All offers must be written on the supplier's letterhead with the name and signature of an individual responsible for the offer.

Step 5 – Purchase Order

Based on the decision of the MC and provided that the requested budget is available and approved by the COST Office, the most suitable offer is approved and a purchase order is raised by the COST Office. The purchase order contains detailed invoice requirements which must be followed to guarantee payment. The COST Communications and Conferences Unit sends the purchase order directly to the publisher with the MC Chair and COST Office SO in copy.

Step 6 – Print Release

Before a final authorisation to produce the publication or dissemination tool is provided to the publisher ('print release'), the COST Communications and Conferences Unit must receive a final proof or sample of the product in electronic format, with proof that it contains the elements

⁴ VAT is not eligible for reimbursement.

described in section 9.3, COST Checklist for Publications, together with an Author's Declaration as described in section 9.3.1. If these elements are present, the COST Communications and Conferences Unit issues a 'print release' instruction directly to the publisher.

Step 7 – Delivery and Payment

Payment is generally issued upon delivery. In order for payment to be issued:

- The COST Office must receive at least five copies of the publication (in the case of hard copy publications), or a digital version or link to an online resource in case of digital-only publications/dissemination tools, together with an invoice directly addressed to the COST Communications and Conferences Unit that complies with the invoice requirements stated in the purchase order. If a printed publication, a digital extract of part of the publication or a link to a freely accessible version of part of the publication (e.g. Table of Contents, or Introduction chapter) should also be provided, as specified in Step 4. Please note that the COST Office can only accept payments for services confirmed with a COST purchase order;
- The MC must provide an approval statement to the COST Communications and Conferences Unit confirming that the payment should be processed (i.e. that the services in question - including distribution - have been delivered in a satisfactory manner).

8.3 COST Checklist for Publications

All publications and dissemination tools funded by COST must comply with the COST Checklist for Publications as described below:

1 - COST Logo

The COST logo must be displayed on the front cover page (or in an equally prominent position in the case of non-traditional publications e.g. websites, DVDs, CD-ROMs, videoclips etc.);



Please note: The COST logo is available from the COST Office (resolution 300 dpi, .jpeg format) by emailing publications@cost.eu. The logo should never be distorted nor tiled; with the exception of book/folder spines, the logo should only be used in a horizontal configuration; in case of co-branding the COST logo should be equal in size or larger than other logos. Equally, COST should have the same amount of exposure as other institutions/organisations co-funding the publication.

2 - EU and ESF Logos

The EU and ESF Logo must be included in the publication's cover matter (e.g. on the back cover or inner pages for hard copy publications), or in an equally prominent position (e.g. page footer on online applications), with the following compulsory sentence next to it:



ESF Provides the COST Office through an EC contract



COST is supported by the EU RTD Framework Programme

Please note: The ESF logo is available from the COST Office (resolution 300 dpi, .jpeg format) by emailing publications@cost.eu.

Instructions on the use of the EU emblem are available on:
http://europa.eu/abc/symbols/emblem/graphics1_en.htm

3 - COST Description

The publication should include a page or section featuring the following text:

COST - European Cooperation in Science and Technology is an intergovernmental framework aimed at facilitating the collaboration and networking of scientists and researchers at European level. It was established in 1971 by 19 member countries and currently includes 35 member countries across Europe, and Israel as a cooperating state.

COST funds pan-European, bottom-up networks of scientists and researchers across all science and technology fields. These networks, called 'COST Actions', promote international coordination of nationally-funded research.

By fostering the networking of researchers at an international level, COST enables break-through scientific developments leading to new concepts and products, thereby contributing to strengthening Europe's research and innovation capacities.

COST's mission focuses in particular on:

- *Building capacity by connecting high quality scientific communities throughout Europe and worldwide;*
- *Providing networking opportunities for early career investigators;*
- *Increasing the impact of research on policy makers, regulatory bodies and national decision makers as well as the private sector.*

Through its inclusiveness, COST supports the integration of research communities, leverages national research investments and addresses issues of global relevance.

Every year thousands of European scientists benefit from being involved in COST Actions, allowing the pooling of national research funding to achieve common goals.

As a precursor of advanced multidisciplinary research, COST anticipates and complements the activities of EU Framework Programmes, constituting a "bridge" towards the scientific communities of emerging countries. In particular, COST Actions are also open to participation by non-European scientists coming from neighbour countries (for example Albania, Algeria, Armenia, Azerbaijan, Belarus, Egypt, Georgia, Jordan, Lebanon, Libya, Moldova, Montenegro, Morocco, the Palestinian Authority, Russia, Syria, Tunisia and Ukraine) and from a number of international partner countries.

COST's budget for networking activities has traditionally been provided by successive EU RTD Framework Programmes. COST is currently executed by the European Science Foundation (ESF) through the COST Office on a mandate by the European Commission, and the framework is governed by a Committee of Senior Officials (CSO) representing all its 35 member countries.

More information about COST is available at www.cost.eu.

4 – Mention of COST Support

COST support should be mentioned in the introduction (or in an equally prominent position in the case of non-traditional publications) as follows:

‘This publication is supported by COST’

5 – Cataloguing Data

The following cataloguing data should appear on the last recto page of the publication:

- Formal publisher;
- Book title;
- Year of publication;
- ISBN or ISSN;
- Sales price (if applicable);

6 – Copyright Notice and Citation Indication

If the publication is produced by a printing house or is otherwise not covered by third party copyright, and copyright stays with COST, the following copyright notice should be included (substitute the text in square brackets with applicable data):

‘© COST Office, [YEAR]

No permission to reproduce or utilise the contents of this [type of publication] by any means is necessary, other than in the case of images, diagrams or other material from other copyright holders. In such cases, permission of the copyright holders is required.’

A short citation indication should also be included where applicable, as follows:

*‘This [type of publication, e.g. book] may be cited as:
COST Action [number] – [Title of publication]’*

Please note: exceptions to the above must be justified in writing by the MC Chair.

7 – COST Office Legal Notice

‘Neither the COST Office nor any person acting on its behalf is responsible for the use which might be made of the information contained in this publication. The COST Office is not responsible for the external websites referred to in this publication.’

8 – Author Data

Importantly, each publication or dissemination tool must mention all the authors involved in its production.

8.3.1 Author’s Declaration

[Title of Publication]

[COST internal reference number]

I, the author and/or owner of copyright of this Publication, wishing to have the Publication published and distributed by COST, make the following representations and warranties:

1. *I have made all necessary inquiries, and have obtained all necessary copyright licenses and authorisations to include material in the Publication for which other persons own copyright.*
2. *I have made all necessary inquiries, and have identified all authors and owners of copyright in the Publication.*
3. *I have made all necessary inquiries, and the Publication does not libel or violate the privacy rights of any third party.*
4. *I have informed all copyright owners in the Publication of this Author Declaration, and I have obtained authorisation from all copyright owners to execute this declaration on behalf of all copyright owners in the Publication.*
5. *I will indemnify COST and/or its legal entity ESF, from any and all claims arising from publication of the Publication, including but not limited to libel and copyright or moral rights infringement.*
6. *I represent and warrant that the Publication has not been published previously and is not under consideration for publication elsewhere.*
7. *I agree to the publication and use of my name and the e-mail address filled in below for promotional purposes and grant COST and/or its legal entity ESF the permission to publish extracts of the publication as necessary to fulfil this purpose.*

9. General principles

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9.1 Access to archived documents, Controls & Audits

The Grant Holder and the COST Office reserve the right to request at any time, additional documents for the purpose of financial verification from meetings participants, STSM grantees, Training School trainers and trainees or from any other participants or any other expenses claimed whilst implementing COST Activities. All relevant financial information and supporting documents must be kept for 5 years after the end of the Seventh Framework Programme (until 31 May 2019) for audit purposes.

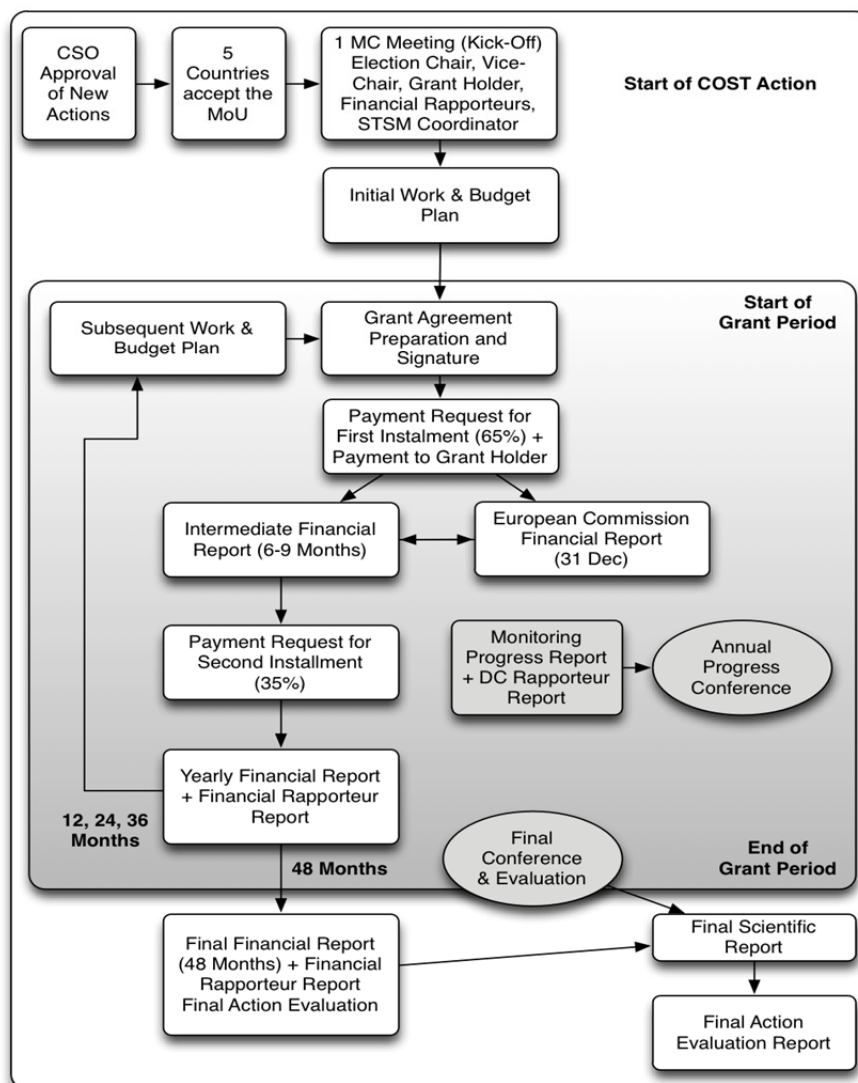
9.2 Derogations

Any derogation from the rules stated in this document requires the explicit written agreement from the COST Office prior to any commitments or payments being incurred by the Grant Holder.

Derogation can only be granted only if:

1. It is justified because of reasons that go beyond the control of the Grant Holder or the Action's participants. (e.g. 'force majeure', natural disasters, travels delays etc.);
2. The COST Office may specifically approve any other duly justified exception which does not violate any other legal or financially binding provisions that are in place.

Annex I



Annex II

Near Neighbour Countries (NNC)

Near Neighbour countries are countries approved by the CSO which are to benefit from dedicated support for the integration of their scientists in COST activities. These countries are:

Albania, Algeria, Armenia, Azerbaijan, Belarus, Egypt, Georgia, Jordan, Lebanon, Libya, Moldova, Montenegro, Morocco, Palestinian Authority, Russia, Syria, Tunisia and Ukraine.

Researchers affiliated to institutions in NNC can participate in a COST Action on the basis of mutual benefit. In case where a researcher from NNC is a COST Action Participant in the initial proposal, thus his/her participation is approved *de facto* when the Action is approved by the CSO. This is, however, subject to the consent of the MC once the MC is established. In cases where a researcher from NNC is not in the initial proposal, it is still possible to become an Action Participant (MC Observer). This participation requires the approval by the MC, the DC and the JAF. In the final year of a COST Action, no requests from researchers from NNC to join an Action shall be possible.

The procedure for Researchers from NNC to become an Action Participant is as follow:

1. Applicant contacts the MC Chair to inform about the interest in joining the COST Action
2. Applicant writes an official letter (which can be scan and send by email) to the MC Chair showing the mutual benefit involved. The letter should be on official headed paper of affiliated institution;
3. MC Chair launches the application procedure in e-COST and uploads the letter addressed to him by the Applicant showing the mutual benefit;
4. Applicant will receive an email to fill in practical information;
5. COST Office SO will check if all the practical information is filled in correctly and if the official letter to the MC Chair has been uploaded and validate the application;
6. After the COST Office approval, the accelerated written procedure is automatically launched.
 - The MC has 5 days to analyse and approve the request. Tacit approval applies if there is not a specific rejection after 5 days;
 - Following MC approval, the DC has 5 days to analyse and approve the request. Tacit approval applies if there is not a specific rejection after 5 days;
 - Following DC approval, the JAF has 5 days to analyse and approve the request. Tacit approval applies if there is not a specific rejection after 5 days.

Once approved as COST Action Participants:

1. These Action Participants are eligible for reimbursement as defined in the Vademecum;
2. A top-up to the COST Action budget of up to 10% could be granted, subject to the effective participation (and related reimbursement) of researchers from NNC to the related Action activities, after evaluation of the COST Science Officer in charge of the Action.

International Partners Countries (IPC)

International Partners Countries are all those countries that are neither COST Member Countries, nor Cooperating State nor Near Neighbour Countries. The Reciprocal Agreement countries (Argentina, Australia, New Zealand and South Africa) are considered as IPC.

Researchers affiliated to institutions in IPC can participate in COST Action on the basis of mutual benefit. In case where a researcher from IPC is a COST Action Participant in the initial proposal, thus his/her participation is approved *de facto* when the Action is approved by the CSO but is subject to the consent of the MC once established. In cases where a researcher from IPC is not in the initial proposal, it is possible to become an Action Participant (MC Observer). This participation requires approval by MC, DC and JAF. In the final year of a COST Action, no requests from researchers from IPC to join an Action shall be possible.

The procedure for Researchers from IPC to become an Action Participant is as follow:

1. Applicant contacts the MC Chair to inform about the interest in joining the COST Action
2. Applicant writes an official letter (which can be scan and send by email) to the MC Chair showing the mutual benefit involved. The letter should be on official headed paper of affiliated institution;
3. MC Chair launches the application procedure in e-COST and uploads the letter addressed to him by the Applicant showing the mutual benefit;
4. Applicant will receive an email to fill in practical information;
5. COST Office SO will check if all the practical information is filled in correctly and if the official letter to the MC Chair has been uploaded and validate the application;
6. The MC analyses and approves the request;
7. Following MC approval, the DC analyses and approves the request;
8. Following DC approval, the JAF analyses and approves the request by written procedure (the written procedure of JAF is launched 4 times a year: last Fridays of February, May, August and November. Please note that the written procedures last 2 weeks, so the request will be approved only two weeks after the launch of the procedure – e.g. mid-March, mid-June, mid-September and mid-December);

These Action Participants are never eligible for reimbursement.

Specific Organisations

EU Agencies: mean any official body governed by European public law, with its own legal personality, 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 but distinct from the EU institutions. The list of EU Agencies can be found on:

http://europa.eu/agencies/regulatory_agencies_bodies/policy_agencies/index_en.htm

The EC and EU Agencies can propose new Actions if associated with at least 5 COST Member Countries or Cooperating State. The EC and EU Agencies can be an Action Participant (MC Observers) in the initial proposal, thus their participation is approved *de facto*. After 12 months of the start of the Action, participation from the EC and EU Agencies is subject to the MC approval. Action Participants from EC and EU Agencies are not eligible for reimbursement, unless there are special provisions decided by the CSO.

European RTD Organisation: means any intergovernmental scientific research organisation that is responsible for infrastructures and laboratories whose members are countries, and the majority of which are COST Member Countries or Cooperating State.

It concerns 8 organisations: CERN - European Organisation 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, ILL - Institut Laue-Langevin

European RTD Organisations can propose new Actions if associated with at least 5 COST Member Countries or Cooperating State. European RTD Organisations can become Action Participant (MC Observers). They can be an Action Participant in the initial proposal, thus their participation is approved *de facto*. After 12 months of the start of the Action, participation from European RTD Organisations is subject to the MC. Action Participants from European RTD Organisations are eligible for reimbursement, unless there are special provisions decided by the CSO.

International Organisation: means an intergovernmental organisation, other than the European Communities, which has legal personality under international public law, as well as any specialised agency set up by such an international organisation.

International Organisations can become Action Participant (MC Observers). They can be an Action Participant in the initial proposal, thus their participation is approved *de facto*. After 12 months of the start of the Action, participation requires approval by MC, DC and JAF. Action Participants from

International Organisations are not eligible for reimbursement, unless there are special provisions decided by the CSO.