EUROPEAN COOPERATION
IN SCIENCE AND TECHNOLOGY

COST Vademecum

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Scope of this document

COST (European Cooperation in Science and Technology – see www.cost.eu) is a unique platform where European researchers can jointly develop their ideas and initiatives across all scientific disciplines through trans-European networking of nationally funded research. Based on a European intergovernmental framework for CO-operation in Science and Technology with 36 Member Countries and one Co-operating 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 contributing to building 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) Horizon 2020 Programme whereby the European Commission (EC) entered into a Framework Partnership Agreement with the COST Association which operates under direct instruction from the COST Committee of Senior Officials (CSO).

COST activities are largely arranged as COST Actions. Actions are selected through a bottom-up, science and technology driven approach. Actions provide the operational basis for structuring pan-European networks facilitating researchers from COST Countries and beyond to jointly develop ideas and new initiatives in any field of science and technology.

The rules and principles governing all COST activities are established in a series of documents approved by the CSO under the collective heading of "COST Implementation Rules". The set of COST Implementation Rules are divided into different levels:

The first level of rules is the "COST Rules for Participation in and Implementation of COST Activities". They take precedence over all other sets of rules and guidelines. They define the main principles governing participation in COST activities and establish the main channels of articulation between the different set of COST Implementation Rules. These rules strictly capture and adhere to CSO decisions.

The second level of rules further develop the principles and rules contained in the COST Implementation Rules concerning the implementation of COST Activities. They also include the rules on the submission, evaluation, selection and approval of proposals for COST Actions; the rules related to the management, monitoring and final assessment of COST Actions; the rules on COST international cooperation; the rules dealing with the implementation of communication activities and the rules governing COST strategic initiatives.

The third level of the rules is comprised of rules contained within this document: the COST Vademecum which explain in user friendly language the second level of the rules. This level of rules aim to inform and facilitate the implementation of COST activities for the understanding of a broader range of COST actors. The "COST Rules for Participation in and Implementation of COST Activities" mentioned above takes precedence over all other COST implementation rules that are general or specific in nature.

The administrative provisions detailed in this document: COST Vademecum are aligned to the rules and the principles detailed in the above mentioned "COST Implementation Rules". This current version of this document can be found on the COST website at http://www.cost.eu/participate/networking.

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Explanation of the terms used throughout this document

COST Member Country

Any country that was a founding member of the COST Intergovernmental Framework or joined COST as a full member following the approval of the Statutes of the COST Association. 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, Montenegro, The Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom and the former Yugoslav Republic of Macedonia.

These countries govern COST via their representatives in the COST Committee of Senior Officials (CSO) - the General Assembly of the COST Association.

COST Cooperating State

Any country that has been approved by the CSO to participate in COST and its governance but has no voting rights within the CSO. The COST Cooperating State is: Israel.

COST Country / COST Countries

Are consolidated terms used interchangeably in this document for the purpose of enabling the country categories of COST Member Country and COST Cooperating State to be used collectively.

Action Memorandum of Understanding (MoU)

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 accepted by any additional COST Member Country and / or Cooperating State joining the Action. The MoU has, as a technical annex, core elements of the proposal submitted in the frame of the Open Call.

Participating COST Countries

COST Member Countries and / or Cooperating State that have accepted the Action's MoU.

COST Near Neighbour Countries (NNC)

Countries approved by the CSO to benefit from dedicated support for the integration of their researchers in COST activities.

Approved NNC institution

An institution located in a NNC whose participation in an Action has been approved in accordance with the relevant COST rules.

EU Agencies

Any organisation 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.

European RTD Organisation

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.

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International Organisation

Any organisation with a European or international membership, scope or presence, with its own legal personality, governed by international public law or recognised to have value in promoting scientific and technological cooperation, which should contribute to the fulfilment of the COST Mission.

International Partner Countries (IPC)

All those countries that are neither COST Member Countries / Cooperating State nor are they COST NNC.

Approved IPC institution

An institution located in an IPC whose participation in an Action has been approved in accordance with the COST rules governing International Cooperation.

Early Career Investigator (ECI)

A researcher within a time span of up to 8 years from the date they obtained their PhD/doctorate (full-time equivalent).

Action Participants

Researchers, engineers or scholars who actively participate in a COST Action (MC Members, Working Group members etc.) including researchers from Participating COST Countries, approved NNC institutions, approved IPC institutions as well as those approved European Commission / EU agencies, European RTD Organisations and International Organisations.

Action Management Committee (MC) Members

A group of researchers, engineers or scholars nominated by the COST National Coordinators (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 funds with a view to achieving the Action's scientific and technological objectives.

Management Committee (MC)

A group of researchers, engineers or scholars representing COST Member Countries and / or the COST Cooperating State that have accepted the MoU. They are 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 achieving the Action's scientific and technological objectives. They are nominated by the COST National Coordinators.

Action Chair and Action Vice Chair

Elected by written procedure or during a MC Meeting from amongst the Action's MC Members. The Action Chair is responsible for the coordination and implementation of the Action. The Action Vice Chair assists in these activities where requested to do so by the Action Chair and can substitute for the Action Chair when required or mandated to do so.

MC Observers

A researcher, engineer or scholar observing a COST Action’s coordination and decision-making process and activities on behalf of his/her institution of affiliation (approved NNC institutions, approved EU agencies, approved European RTD, approved International Organisation or approved IPC institutions).

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Action Participant

Any researcher, engineer or scholar who actively participates in a COST Action.

Invited Speakers

Specialists who are not Action Participants but can partake in one COST Action meeting and one Training School throughout the lifetime of the Action.

The Committee of Senior Officials (CSO)

The main decision-making body of COST, responsible for the strategic development of COST. It formally approves new Actions following the conclusion of each Open Call procedure. Each COST Member Country can appoint up to two representatives to the CSO.

The Executive Board (EB) of the CSO

Prepares for the CSO meetings and can make decisions on behalf of the CSO. The EB consists of the President and the Vice President of the CSO and at least five other delegates from the CSO.

COST National Coordinators (CNC)

The individuals appointed by each COST Member Country and Cooperating State to coordinate and oversee the acceptance of Action Memorandum of Understandings. They are also in charge of the nomination process for their Management Committee Members as well as providing guidance, information and support to their national research communities.

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1. COST Actions

1.1. COST Action Overview

A COST Action is a science and technology network funded over a four-year duration requiring the participation of at least five COST Countries. An Action is organised through a range of networking tools aimed at supporting and ultimately achieving the scientific objectives set out in the Action's Memorandum of Understanding.

1.1.1. First Management Committee (MC) Meeting

The date of the first MC Meeting of an Action marks the official start date of the Action. The First MC Meeting is always organised, administered and funded centrally by the COST Association administration and is usually held at the COST Association premises. Activities funded centrally by the COST Association are funded under what is known as the COST Centralised Management Funding Scheme (formerly titled: PAYG). The First MC Meeting must take place within the six month period following the approval of the Action by the CSO.

1.1.2. COST Grant System (CGS)

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

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

The COST Grant can only be used to support approved activities necessary for and dedicated to achieving the Action's objectives and / or supporting policies subjugated by the CSO. Action funds cannot be directly used for submitting research proposals for the purpose of acquiring funding for national, European or internationally sourced research grants.

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

1.2. COST Action Participation

1.2.1. COST Country Participation

Action Participants whose primary affiliation is in an institution located in a COST Country can participate in a COST Action once their respective country has accepted the MoU of the respective Action.

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

When the period of 12 months has elapsed from the date the CSO approved an Action, the participation of additional COST Countries beyond this period is subject to formal approval of the MC of the Action.

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1.2.2. Near Neighbour Countries (NNC) Participation

Action Participants affiliated to universities, research centres, companies or other relevant legal entities located in Near Neighbour Countries (NNC) may participate in a COST Action on the basis of the ascertained mutual benefit. The full list of NNC and the respective application and approval procedure is detailed in COST 132/14 (List) and 135/14 (Application and approval procedure). Participants affiliated to institutions formally approved onto the Action may be invited by the MC as an MC Observer (having no voting rights within the MC). MC Observers from NNC cannot be elected as an Action Chair / Vice Chair or as a Working Group Leader. The rules governing the eligibility for the reimbursement of participants from approved institutions located in NNC are detailed in Section 3, 4, 5 and 7 of this document.

1.2.3. International Partner Countries (IPC) Participation

Action Participants affiliated to universities, research centres, companies or other relevant legal entities located in International Partner Countries (IPC) may participate in a COST Action on the basis of ascertained mutual benefit. Researchers in approved institutions in IPC may be invited by the Action MC as an MC Observers (having no voting rights within the MC). MC Observers located in IPC cannot be elected as an Action Chair / Vice Chair or as a Working Group Leader. Additional information about IPC (definitions and the application / approval procedure) is detailed in COST 135/14. The rules governing the eligibility for the reimbursement of participants from approved institutions located in IPC are detailed in Section 3, 4, 5 and 7 of this document.

1.2.4. European Commission (EC) and EU Agencies

The European Commission and EU Agencies can nominate representatives to participate as MC Observers (having no voting rights within the MC). MC Observers from EC and from EU Agencies cannot be elected as an Action Chair / Vice Chair or as a Working Group Leader and cannot be reimbursed using COST funds unless there are special provisions introduced by the CSO. Additional information (definitions and the application / approval procedure) is detailed in COST 135/14.

1.2.5. European RTD Organisation

A European RTD Organisation may participate in a COST Action and can nominate representatives to participate as MC Observers (having no voting rights within the MC). MC Observers from European RTD Organisation cannot be elected as an Action Chair / Vice Chair or as a Working Group Leader. Action Participants from European RTD Organisations are eligible for reimbursement, unless there are special provisions decided by the CSO. Additional information (definitions and the application / approval procedure) is detailed in COST 135/14.

1.2.6. International Organisation

An International Organisation (IO) may participate in a COST Action and can nominate representatives to participate as MC Observers (having no voting rights within the MC). MC Observers from an IO cannot be elected as an Action Chair / Vice Chair or as a Working Group Leader. MC Observers from an approved IO cannot be reimbursed using COST funds unless there are special provisions introduced by the CSO.

1.3. COST Action Scientific Reporting

1.3.1. Action Monitoring and Final Assessment

The scientific progress of each COST Action will be assessed based on what is reported and substantiated in three distinct reports submitted by the Action:

- Progress Report 1 due at month 18 of the COST Action, the outcome of which will be taken into account when setting the budget and the Work and Budget Plan for the following Grant Period.
- Progress Report 2 due at month 36 of the COST Action, the outcome of which will be taken into account when setting the budget and the Work and Budget Plan for the final Grant Period.
- Final Achievement Report at the end of the Action.

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Action Rapporteur

An independent Action Rapporteur will be appointed by the COST Association and will prepare a Monitoring Report, after receipt of the Action's Progress Reports, and a Final Assessment Report, after receipt of the Action's Final Achievement Report.

The Action Rapporteur will perform progress reviews and the final assessment remotely. In cases, where progress reviews identify that an Action is at risk of not achieving the objectives detailed in its MoU then a meeting will be convened between the Action Chair, Vice Chair / Working Group leaders, the Action Rapporteur, the Action Administrative Officer and the Action Science Officer.

Reporting templates

The templates for the Progress Reports / Final Achievement Report can be found at the COST Action Template Centre on the COST website - see http://www.cost.eu/participate/networking.

Reporting deadlines

The Science Officer of each Action will contact each Action Chair to inform them of the deadlines for submitting their scientific reports. Any question regarding Action monitoring and the final assessment should be directed to the respective Action Science Officer.

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2. COST Action Management

2.1. First Management Committee (MC) Meeting

The date of the first MC Meeting of an Action marks the official start date of a COST Action. The First MC Meeting is always organised, administered and funded centrally by the COST Association and is usually held at the COST Association premises.

2.1.1. Election of the Action Chair / Action Vice Chair / Election of the Grant Holder

During the first MC Meeting of the Action, the MC elects an Action Chair and Vice Chair from amongst its members by means of a simple majority vote. The Action Chair and Vice Chair must represent two different Participating COST Countries.

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

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

2.2. COST Grant System (CGS)

Once the first Management Committee Meeting has been concluded, the COST Action is then funded and implemented under the tenets of the COST Grant System (CGS).

2.2.1. Selection of the Grant Holder

The CGS requires that an established legal entity, of which one of the MC Members must be affiliated to, is elected by the MC to oversee the financial management and the various coordination tasks required to successfully support the implementation of approved COST activities. The decision to elect the chosen Grant

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Holder must be recorded in the minutes of the respective MC Meeting or must be secured by written procedure (which is also known as an e-vote). This legal entity becomes known as the Grant Holder. The Grant Holder must be a legal entity under national, international, public or private law. It cannot be an individual. The Grant Holder must ensure that all approved activities are implemented in line with MC decisions. Decisions must be made in accordance with the relevant set of COST Implementation Rules, the rules detailed in the COST Vademecum and the terms and conditions contained within the COST Action Grant Agreement.

When electing the Grant Holder, the MC must take into consideration the following criteria:

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

The COST Association will assess the appropriateness and viability of each proposed Grant Holder institution and can request the official statutes and / or a statement of accounts of the given institution prior to the transference of the Grant. Any subsequent evaluation of the Grant Holder's performance by the COST Association may determine that the replacement of a specific Grant Holder is necessary. A change of Grant Holder requires formal approval by both the COST Association and the Action MC.

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

1. **Scientific Representative**: is the MC Member affiliated to the Grant Holder Institution. The Scientific Representative should attend MC Meetings and must be readily available to support the MC in monitoring the progress of the Action.

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

   - The COST National Coordinator can nominate another researcher who is affiliated to the Grant Holder Institution to become a MC Member. In this case, the newly nominated researcher will become de facto the Scientific Representative.

   Or

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

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

3. **Financial Representative**: is the person from the Grant Holder Institution who has the legal authority to financially commit the institution in question and to validate the expenses listed in financial reports.

4. **Grant Manager**: is the person working or affiliated to the Grant Holder Institution who is responsible for overseeing the administrative management of the COST Action and is the primary user of the e-COST Action management tool.

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2.2.2. Grant Holder tasks and responsibilities

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

1. Scientific Coordination Tasks of the Grant Holder

The Grant Holder must support the MC in the production of the required scientific reports for the proper implementation and evaluation of the Action (see Section 1.3).

2. Administrative Tasks of the Grant Holder (Non-Exhaustive List)

- Preparation of documentation for meetings under the guidance of the Action Chair / Vice Chair (e.g. overseeing MC approvals, distributing agendas, issuing invitations, drafting minutes and ensuring that all eligible participants sign the relevant attendance lists etc.).
- Coordinating Action meetings funded under the CGS - Please note that if the Grant Manager's participation in the approved activity is purely administrative (meaning that they are not a MC Member, MC Substitute, WG Member, STSM Grantee or Trainer / Trainee) then the associated expenses must be sourced from the FSAC and not from the scientific expenditure budget lines, unless the Grant Manager is explicitly working directly on research related activities.
- Collecting and archiving supporting documents related to processing reimbursement claims and the associated payments.
- Archiving all necessary MC decisions relating to the Action.

3. Financial Tasks of the Grant Holder (Non-Exhaustive List)

- Ensure that all payments linked to approved COST Action activities are paid in line with MC approvals and eligibility criteria stipulated in the COST Vademecum. With respect to reimbursing Action Participants, the Grant Holder must process reimbursements within 30 calendar days after receiving the claimant's complete claim. In cases where advance payments are requested by participants and / or grantees, the Grant Holder assumes the financial risk associated with doing so. All payments related to COST activities must be finalised and recorded in e-COST only after all the administrative requirements have been satisfied.
- Ensure the preparation and delivery of financial reports within the deadlines stipulated in the Action Grant Agreement.

The following financial reports must be submitted by the Grant holder:

- Intermediate Financial Report (IFR): the IFR is to be submitted when requesting the second (or third) payment. The IFR must be signed by hand in blue ink by the financial or legal representative of the Grant Holder. A scanned PDF document of the signed IFR can be submitted to the COST Association.

- Yearly Financial Report (YFR): the YFR is due within 60 calendar days from the end of each Grant Period. The expenses reported in the YFR must contain only finalised and paid claims. The YFR must be signed by hand in blue ink by the Financial or Legal Representative of the Grant Holder, and by the Action Chair (or Vice Chair if the Action Chair is affiliated to the Grant Holder Institution). The original signed YFR must be sent by post to the COST Association – scanned PDFs of the signed YFR will not suffice.

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

4. Dissemination and Publications tasks of the Grant Holder

The Grant Holder must support the Action with the production of its publications and in monitoring the implementation and maintenance of the Action website.

2.2.3. Financial Scientific and Administrative Coordination (FSAC)

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

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

2.3. COST Action Grant Agreement and Work and Budget Plan

For each approved COST Action, the COST Association and the Grant Holder must sign, in covenant, an Action Grant Agreement governing Grant Period's typically lasting 12 months.

For each Grant Period, the MC is required to plan, define and approve, in the guise of a Work and Budget Plan, the Action's scientific activities. Each Action has a designated budget amount, which signifies the maximum financial contribution that will be provided by the COST Association for the given Grant Period. A COST Grant funds scientific activities under the following budget lines:

1. Meetings.
2. Training Schools.
3. Short Term Scientific Missions (STSM).
4. Dissemination activities and Publications.
5. Other Expenses Related to Scientific Activities (OERSA).
   Budget lines 1-5 come under the collective heading: 'science expenditure'. The MC can rearrange the budget allocation for approved activities listed under 'science expenditure'.
6. Financial Scientific and Administrative Coordination tasks ((FSAC) - See Section 2.2.3.).
   Budget line 6 is a fixed percentage contribution afforded to support the Grant Holder's in administering and coordinating the approved scientific activities.

The scientific activities that can be performed throughout each Grant Period are captured in a Work and Budget Plan that must be approved by the Action Science Officer and by the MC before any scientific activities can commence. The Action's Science Officer must be promptly informed by the Action Chair when an approved activity has been cancelled. In addition, Science Officer approval is required to sanction the inclusion of additional activities that were not originally foreseen in the approved Work and Budget Plan. The approved Work and Budget Plan forms the Annex A to the Action Grant Agreement.

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2.3.1. COST Action Grant Agreement Amendment

An amendment to the Action Grant Agreement is mandatory when:

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

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

2.4. Payment Modalities

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

Grant payments are processed by instalments in EUR and can only be paid into the Grant Holder's institutional bank account. Grant payments cannot be paid into an individual's private bank account. Bank and / or currency related charges linked to receiving Grant payments described in this section are to be borne by each respective Grant Holder.

1. For the Action's first Grant Period, a first instalment of 65% of the allocated Grant amount is transferred to the Grant Holder only after the Grant Agreement has been signed by both parties (the first payment for TDP Pilot Actions is typically 33% of the allocated Grant). The payment of first instalments for all subsequent Grant Period's requires that Yearly Financial Reports (YFR) detailing eligible expenses for the preceding Grant Period must be validated by the COST Association before the associated transfer of funds can be made. If the entire Grant amount has been paid to a Grant Holder in any given Grant Period, then any underspend will be automatically deducted from the amount paid to the Grant Holder for the first instalment of the subsequent Grant Period.

2. For all Grant Periods, a second instalment concerning the allocated Grant amount can be made with the following considerations:
   - the amount to be paid must be coherent with the amounts stated on the Intermediate Financial Report (IFR) – typically, an amount of up to 35% of the allocated Grant amount (and up to 33% of the allocated Grant amount for TDP Pilot Actions) can be requested;
   - the request for payment is to be submitted between month 6 and 8 of the relevant Grant Period.

3. For TDP Pilot Actions only, a third instalment of up 34% of the allocated Grant amount is typically requested with the following consideration:
   - the amount paid is coherent with the amounts stated on the validated Intermediate Financial Report (IFR).

Each Grant Holder can request less than the maximum permissible amount when requesting their second instalment. This may give rise for the need for a third instalment concerning a balance payment. A third instalment can only be processed after the submission and validation of an IFR or a YFR. This third payment option is subject to COST Association approval.

2.4.1. Returning unspent funds

The COST Association reserves the right to reclaim funds from the Grant Holder when:
1. There is an under spend at the end of the last Grant Period of the Action.
2. There is an under spend at the end of a Grant Period where a change of Grant Holder is required.
3. The non-fulfilment of the Grant Holder's contractual obligations and / or the non-performance of their tasks and responsibilities are discernible.

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In any of the aforementioned scenarios, the Grant Holder has to provide the COST Association with a finalised Yearly Financial Report (YFR) in order to bring the respective Grant Period to an end. When the YFR has been validated by the COST Association and an underspend is evident, the COST Association will request the repayment of the unspent funds.

2.5. Non-Fulfilment of Contractual Obligations or Mismanagement of Funds

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

1. The suspension of all pending and / or future payments and the recovery of the amounts already paid.
2. The suspension or cancellation of the Action Grant Agreement.
3. A replacement of the Grant Holder.
4. Financial penalties may be incurred as specified in the relevant section of the signed Grant Agreement.

2.6. e-COST and Strong Authentication

It is compulsory that all Grant Holders use the online Action management tool: **e-COST**.

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

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

Grant Holders can opt to activate the Strong Authentication feature by making a formal request to the COST Association at the following email address: www.helpdesk@cost.eu. Each Grant Holder must first, however, check that the requirements linked to the feature do not contravene their institutions fiscal obligations with respect to archiving documentation.

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

For Grant Holders opting to use the Strong Authentication feature, the original signed and dated OTRR form and the associated invoices/receipts must be kept by each claimant up to the end date of the audit timeframe specified in the Grant Agreement signed between COST and the Grant Holder (the end date of the audit timeframe is also specified on the reimbursement rules attached to the downloadable reimbursement form generated by each participant).

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

Grant Holder choosing not to opt for the Strong Authentication feature must archive original (signed by hand) OTRR forms submitted by all participants along with legible copies (electronic copies will suffice) of all

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supporting documentation (including MC approvals) related to Meetings up to the end date of the audit timeframe that is specified in the Action Grant Agreement signed between COST and the Grant Holder.

2.7. Other Expenses Related to Scientific Activities

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

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

2.8. General Non-Eligible Expenses under the COST Grant System (CGS)

1. Identifiable indirect and direct taxes and duties, including Value Added Tax (V.A.T.)

Airport taxes are not “real” taxes in the sense of tax law but are fees and charges levied on the services provided by an airline and / or by a public or semi-public body providing any such service (for example, the services provided by the airport itself). When airport taxes are levied by airlines, airport authorities or one of the abovementioned bodies, such charges may be considered as being a fee and not a tax and can therefore be considered as being an eligible expense.

V.A.T. is not a fee and is a non-eligible expense under the CGS, irrespective of whether the Grant Holder institution is subject to pay V.A.T. or not. V.A.T. cannot be claimed or be reimbursed and must be paid using sources other than COST funds.

Taxes normally applicable according to national law on the reimbursement of flat rates or fixed grants are not to be considered under the CGS due to the nature of COST funds. COST is exclusively funded by European public money and travel, accommodation and meal reimbursements paid to eligible COST Action participants are not taxable and cannot be deducted from amounts due.

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 with respect of another project.
7. Exchange rate losses and expenses related to a return on capital.
8. Expenses linked to activities that do not have a clear and recognisable association with supporting COST activities.

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

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3. Meeting Types and Eligibility

COST supports different categories of meeting as part of its "Meetings" networking tool. The following considerations must be respected in all cases:

1. All activities must be approved by the MC and by the Action Science Officer. The Action Chair must acquire approval of the MC and the Action Science Officer for changes to the approved Work and Budget Plan such as the cancellation of activities and / or the inclusion of new additional activities not originally included in the approved Work and Budget Plan.
2. COST meetings, workshops and conferences must be held for the sole purpose of supporting the Action's scientific and networking activities in line with the objectives specified in both the Action's MoU and the approved Work and Budget Plans. In its role as organiser or co-organiser, the COST Action must be fully integrated into the scientific programme of the respective event / activity and must have direct involvement in the general organisation of the event. COST must be visible as an organiser or co-organiser on the event's specific website and its promotional materials.
3. For co-located meetings (co-located being multiple COST meetings being held over the same time period in the same venue / city), a limit of four Invited Speakers applies to the combined series of meetings. Only one Local Organiser Support claim can be afforded to support the entire series of co-located meetings with the COST contribution never exceeding EUR 10 000.
4. The MC must determine from amongst eligible participants those who are entitled to be reimbursed. The Action Chair (or Vice Chair if the Action Chair is affiliated to the Grant Holder Institution) can assume this responsibility if the MC formally gives them the mandate to act on their behalf.
5. All categories of Meetings (except Dissemination Meetings – see point 6 below / Section 3.3) must be held in a Participating COST Country.
6. Dissemination Meetings are high profile events / conferences not organised by the COST Action where MC Members or their Substitutes can attend for the purpose of disseminating their Action's activities. This meeting type must be formally approved by both the MC and by the Action's Science Officer unless the dissemination meeting in question has been originally foreseen in the approved Work and Budget Plan. Attendance at European conferences are preferred. Conferences held elsewhere can also be considered.

3.1. Management Committee (MC) Meetings

The Management Committee is comprised of up to two MC Members per Participating COST Country. MC Members are nominated by their respective COST National Coordinator (CNC). The CNC can also nominate MC Substitutes or another country representative to replace MC Members at MC Meetings. A MC Member should always inform their Action Chair and the Action Grant Holder that their officially nominated MC Substitute will be replacing them at a relevant MC Meeting.

3.1.1. Role of the MC within the Action

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

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

1. Simple majority vote at a MC Meeting - decisions taken at MC Meetings by majority vote can only take effect if at least two-thirds of the Participating COST Countries are present and have their vote recorded - each Participating COST Country has one vote.

   Decisions taken by majority vote at MC meetings must be recorded in the minutes of the given meeting. The minutes recording the decisions must be filed with the documents that are relevant to why the MC approval was originally sought. Minutes of MC meetings must be communicated to the MC, the COST Association and uploaded onto the e-COST platform.

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Or

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

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

3.1.2. Participants eligible to be reimbursed for their attendance at MC Meetings

1. Up to two MC Members (or their Substitutes) from Participating COST Countries are eligible to be reimbursed for their attendance at MC Meetings. Each MC member can only be replaced by an officially nominated Substitute
2. MC Observers from approved Near Neighbour Country (NNC) Institutions – limited to one representative from each approved institution and up to a maximum of two representatives from each NNC
3. MC Observers from approved European RTD Organisations limited to one representative from each approved Organisation
4. Working Group leaders from Participating COST Countries in the exceptional cases where Working Group leaders are not MC Members

3.1.3. Participants not eligible to be reimbursed for their attendance at MC Meetings

1. MC Observers from approved IPC Institutions, approved IO, the EC and EU Agencies
2. Invited Speakers
3. Any other participant not specifically mentioned as being eligible

3.2. All other Categories of Meetings (Excluding Dissemination Meetings)

All other types of approved meetings, excluding Dissemination Meetings, focus their work on achieving the scientific and / or technological objectives of an Action in line with those objectives set out in the Action's MoU.

3.2.1. Participants eligible to be reimbursed for other types of Meetings

1. Any Action Participant from Participating COST Countries
2. Any Action Participant from approved NNC Institutions
3. Any Action Participant from approved European RTD Organisations
4. Invited Speakers from Participating COST Countries
5. Up to four Invited Speakers from: those researchers whose primary affiliation is with an institution located in a non-Participating COST Country (which includes those researchers in COST Countries listed as being under intention or researchers in COST Countries who have not yet obtained MC approval to participate in the Action), researchers in non-approved NNC institutions and researchers in any non-approved IPC institution

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

3.2.2. Participants not eligible to be reimbursed for other types of Meetings

1. MC Observers from approved IPC Institutions, approved IO, the EC and EU Agencies
2. Any other participant not specifically mentioned as being eligible

3.3. Dissemination Meetings

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

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

3.3.1. Participants eligible to be reimbursed

1. Action Participants from Participating COST Countries

3.3.2. Participants not eligible to be reimbursed

1. Researchers located in a non-Participating COST Country (which includes those researchers in COST Countries listed as being under intention or those researchers in COST Countries who have not yet obtained MC approval to participate in the Action)
2. MC Observers from approved IPC Institutions, approved IO, the EC and EU Agencies and approved European RTD Organisations
3. Any other participant not specifically mentioned as being eligible

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4. Meetings – Financial Support

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

Participants eligible to be reimbursed should:

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

In order for eligible participants to be reimbursed they must:

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

When using Strong Authentication:

- the original signed and dated OTRR form and the associated invoices / receipts must be kept by each claimant up to the end date of the audit timeframe specified in the Grant Agreement signed between COST and the Grant Holder (the end date of the audit timeframe is also specified on the reimbursement rules attached to the downloadable reimbursement form generated by each participant);

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

When not using Strong Authentication:

- Grant Holders must archive original (signed by hand) OTRR forms along with legible copies of all supporting documentation (electronic copies will also suffice) including MC approvals related to Meetings up to the end date of the audit timeframe that is specified in the Action Grant Agreement signed between COST and the Grant Holder.

All payments made to eligible participants are in Euro at an exchange rate automatically calculated by e-COST which uses the conversion rate applicable at the end date of the meeting in question. Fees incurred by a Grant Holder in relation to returned or rejected payments due to incorrect bank account details being provided by any beneficiary of COST funds can be subtracted from the payable amounts.

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4.1. Eligible Expense

4.1.1. Accommodation (which includes breakfast expenses)

1. The reimbursement of accommodation expenses is based on flat rates only for an amount of up to a maximum of EUR 120 per person per night which, within this agreed flat rate amount, includes a provision for breakfast expenses. No invoices from accommodation providers are required.
2. The maximum number of nights that can be reimbursed equals the number of meeting days attended by the eligible participant (as confirmed by the eligible participant signing the daily attendance list) plus the night prior to the meeting start date. This enables the participant to arrive in the vicinity of the meeting venue on the day before the approved activity starts.
3. Accommodation expenses must be paid by each individual participant.
4. When an eligible participant shares their hotel room with another eligible participant, then only one participant can submit a claim for their accommodation expenses.
5. An eligible participant residing in the same city as where the approved activity is being held should not claim for accommodation expenses.
6. Requests for extra night's accommodation must be approved by the COST Association prior to any related expense being paid to a participant.

The MC may decide to apply a reduced ceiling on the applied flat rate for accommodation expenses. In such cases, all participants must be notified of the revised flat rates before receiving their formal invitations via e-COST. The same accommodation flat rate amount must be afforded to all participants.

4.1.2. Meals

1. Meals are reimbursed against flat rates only (at a maximum of EUR 20 per meal). No invoices or receipts from the meal providers are required.
2. A maximum of up to two meals per day are eligible (two meals strictly concern lunch and dinner provisions - breakfast expenses are not an eligible expense).
3. Meals provided from other sources including the Local Organiser must be deducted from the number of eligible meals that can be afforded to a participant.
4. Requests for extra meals must be approved by the COST Association prior to any related expense being paid to a participant.

   The MC may decide to apply a reduced ceiling on the applied flat rate for meal expenses. In such cases, all participants must be notified of the revised flat rates before receiving their formal invitations via e-COST. The same meal flat rate amount must be afforded to all participants.

4.1.3. Long distance travel expenses

An eligible participant can claim for permissible long distance travel expenses incurred whilst travelling across national borders from the country where he / she is residing (as registered on their e-COST profile) to where the approved COST meeting is being held and back to the country where they reside irrespective of the dates of travel.

Travel Derogations:
Travelling to and from countries other than that where the approved meeting is being held and the country where the eligible researcher is residing (as registered on their e-COST profile) must be explained and detailed by the participant on the relevant claims section on e-COST and on the remarks section on their submitted OTRR form. Their OTRR and justification must be accompanied with the following:

- The full travel itinerary and the invoice for the actual ticket that was purchased along with all of their other supporting documents.
- Comparative quotes sourced from a print-out from a reputable online travel search engine (Skyscanner, Expedia, Opodo etc.) listing the most economical means of travel close to the dates of the meeting for the expectant journey (the expectant journey being as if the participant travelled from

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the country where they are residing (as registered on their e-COST profile)) to the country where the approved activity is being held. The participant can never be reimbursed for more than the cheapest means of travel substantiated on the provided comparative quote and never more than the amount that was actually paid for the travel ticket in question. The lower of the two amounts determines the maximum sum that can be reimbursed to the claimant.

The following conditions apply to the different modes of permissible transportation:

1. Air travel
   - air travel is always classified as long distance travel;
   - the supporting documents provided by the eligible participant must clearly demonstrate the mode of transport taken, the ticket price, the name of the passenger, the dates of travel, departure and arrival times and the booking class (an invoice only showing the amount will not suffice);
   - only economy class tickets are eligible to be reimbursed;
   - air fares exceeding EUR 1 200 require explicit approval from the COST Association before the ticket is purchased by the eligible participant;
   - seat reservations and luggage transportation expenses are eligible to be reimbursed;
   - administrative fees charged by travel agencies are eligible to be reimbursed.

2. Train or Bus

An eligible participant travelling by train or bus crossing national borders from the country where he / she is residing (as registered on their e-COST profile) to the country where the approved COST meeting is being held and back again must respect the following criteria:
   - the supporting documents provided by eligible participants must clearly demonstrate the mode of the transport taken, the travel dates and the full price of the ticket;
   - First, Second and Business class tickets are eligible to be reimbursed;
   - supplements for fast trains and sleepers are eligible to be reimbursed.

3. Car travel

An eligible participant travelling by car crossing national borders from the country where he / she is residing (as registered on their e-COST profile) to the country where the approved COST meeting is being held and back again must respect the following criteria:
   - car travel is limited to a maximum distance of 2 000 km for the entire journey;
   - car travel can be reimbursed at EUR 0.20 per km, when one eligible participant is travelling;
   - car travel can be reimbursed at EUR 0.30 per km, when additional participants who are also eligible to be reimbursed are travelling in the same vehicle. Only the driver can be reimbursed. The names of the other eligible passengers must be mentioned on the remarks section of the OTRR submitted by the driver;
   - submission a proof of distance travelled by means of a print out from Google maps or another reputable online route planner showing the route taken and the kilometres travelled;
   - parking expenses are eligible to be reimbursed based on the submission of receipts / invoices and can only cover the time period relevant to the approved activity (parking expenses can be claimed under Local Transport expenses);
   - additional accommodation expenses, fuel costs, tolls charges and car rental expenses are not eligible to be reimbursed.

4. Ferry expenses

An eligible participant travelling by ferry from the country where he / she is residing (as registered on their e-COST profile) to the country where the approved COST meeting is being held and back again can be reimbursed. Supporting documents provided by eligible participants must clearly demonstrate the mode of the transport taken, the date travelled and the ticket price.

4.1.4. Local transport expenses

1. Public transport expenses

Public transport expenses are bus, train, metro and tram expenses incurred travelling between the following points:

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- home to airport / train station;
- airport / train station in the country where the meeting is being held to meeting venue / hotel;
- hotel to meeting venue or meeting venue to hotel;
- meeting venue and / or hotel to airport / train station;
- airport / train station back to home.

The reimbursement rules for public transport are as follows:

- if the amount claimed for the entire trip is equal or less than EUR 25, then no supporting documents are required. In any case, the details of the relevant journey(s) must be indicated on the OTRR (for both the outbound and inbound journeys);
- if the amount claimed for the entire trip is more than EUR 25, then supporting documents justifying the total amount claimed must be provided by the participant. All receipts must display the amount and the date that the expenses were incurred. All segments of the journey must be detailed on the claimants OTRR.

2. Taxi expenses
   Eligible participants are permitted to claim taxi expenses in the following instances:
   - when public transport is not available; or
   - if taxis are taken before 7 am for an early travel departure and / or after 10 pm due to a late arrival.

Taxi Expenses up to a maximum of EUR 80 for the entire trip can be claimed by eligible participants if either of the above criteria have been respected. Taxi receipts showing the time and date of travel are always required.

3. Car travel

An eligible participant travelling by car between the points listed below can be reimbursed in line with the criteria detailed in Section 4.1.3:

- home to airport / train station;
- airport / train station in the country where the meeting is being held to meeting venue / hotel;
- hotel to meeting venue;
- meeting venue to hotel;
- meeting venue and / or hotel to airport / train station;
- airport / train station back to home.

4. Parking expenses
   Parking expenses are eligible to be reimbursed based on the submission of receipts / invoices and can only
   cover the timeframe relevant to the approved activity.

5. Ferry expenses

Expenses for ferry journeys are eligible between the points listed below:

- home to airport / train station;
- airport / train station in the country where the meeting is being held to meeting venue / hotel;
- hotel to meeting venue;
- meeting venue to hotel;
- meeting venue and / or hotel to airport / train station;
- airport / train station back to home.

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

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4.1.5. Other travel expenses

1. Visa expenses

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

2. Expenses claimed specifically due to medical illness and cases of Force Majeure

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

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

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

4.2. Meetings: Non-Eligible Expenses

1. Registration fees, lecture fees, honoraria.
2. Transportation expenses / postage associated with obtaining visas.
3. Health related expenses; life and medical insurance.
4. Travel cancellation and luggage insurance.
5. Additional accommodation expenses, fuel costs, toll charges and car rental expenses linked to car travel.
6. Wi-Fi, telephone, internet and mini-bar consumption expenses.
7. Printing and postage expenses.
8. Regional and / or national taxation fees; stamp duty expenses.

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5. Training Schools

5.1. Training Schools – Eligibility Rules

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

1. Trainers can be reimbursed for their travel, accommodation and meal expenses as specified in Section 4. Lecture fees for Trainers are not eligible to be reimbursed.
2. Trainees are entitled to receive a fixed Grant in line with the considerations specified in Section 5.3.

The organisational expenses linked to hosting a Training School can be claimed under the Local Organiser Support mechanism - see Section 6: Local Organiser Support. An Action may decide to host multiple meetings in conjunction with a Training School over the same time period in the same venue / city. In such cases, one LOS claim can be afforded to support the entire series of meetings and a separate LOS claim can be afforded to support the Training School. For each individual LOS claim, the COST contribution can never exceed EUR 10 000.

The following considerations must be respected when organising a Training School:
1. The MC must define from amongst eligible participants those Trainers who are to be reimbursed. The MC must also define the financial contribution (in the form of a Trainee Grant) for each eligible Trainee who will be attending the approved Training School. The MC can delegate the pre-mentioned tasks to the Action Chair (or Vice Chair if the Action Chair is affiliated to the Grant Holder Institution).
2. A Training School must have COST Action objectives as its main focus. The COST Action also has to be one of the primary organisers of the Training School and must be clearly promoted on all dissemination channels, namely the official website of the Action / event, brochures and all training material.
3. A Training School must be held in a Participating COST Country or in an approved NNC institution.
4. A reasonable country balance should be respected concerning Trainee participation.

All attendees at approved Training Schools must sign the meeting attendance list on each day that they attend the event. All attendees must also register for an e-COST profile at https://e-services.cost.eu - each participant must add their bank details to their e-COST profile prior to receiving their e-COST invitation.

Trainers eligible to be reimbursed:
1. Trainers from Participating COST Countries
2. Trainers from approved NNC institutions
3. Trainers from approved IPC institutions
4. Trainers from approved European RTD Organisations
5. Up to four Invited Speakers from: those researchers whose primary affiliation is with an institution located in a non-Participating COST Country (which includes those researchers in COST Countries listed as being under intention or researchers in COST Countries who have not yet obtained MC approval to participate in the Action), researchers in non-approved NNC institutions and researchers in any non-approved IPC institution

Invited Speakers are specialists who are not Action Participants but can partake in one Training School throughout the lifetime of the Action. Repeated participation of the same Invited Speakers cannot be funded under the COST Grant. Invited Speakers must appear as a speaker on the agenda of the Training School.

Trainers not eligible to be reimbursed:
1. Trainers from approved IO, the EC and EU Agencies
2. Any other Trainers not specifically mentioned as being eligible

Trainees eligible to be reimbursed:
1. Trainees from all COST Countries
2. Trainees from approved NNC institutions
3. Trainees from approved European RTD Organisations

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Trainees not eligible to be reimbursed:

1. Trainees from approved IPC institutions
2. Trainees from approved IO, the EC and EU Agencies
3. Any other Trainees not specifically mentioned as being eligible

5.2. Training School Trainers – Financial Support

Trainers can be reimbursed in line with the eligible travel, accommodation and meal expenses detailed in Section 4. Lecture fees and honoraria for Trainers are not eligible to be reimbursed.

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

5.3. Training School Trainees – Financial Support

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

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

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

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6. Local Organiser Support (LOS)

6.1. Local Organiser Support (LOS) Rules

The LOS is a contribution to the overall expenses related to organising approved Meetings (excluding Dissemination Meetings), series of co-located Meetings, Conferences, Workshops and / or Training Schools. The Local Organiser can, in agreement with the Action Chair (or Vice Chair if the Action Chair is affiliated to the Grant Holder Institution), choose between 2 reimbursement modalities which determine the basis for calculating the LOS amount that can be claimed.

LOS can only be paid into an institutional bank account and never into a personal bank account.

6.1.1. LOS financial support / reimbursement modalities

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

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

- A maximum of EUR 5 000 can be claimed.
- A participant's signature can be counted towards the eligible lump sum amount that can be claimed regardless of the eligibility status of each signee.
- Attendance must be evidenced by each participant signing the attendance list for each day they attended the approved activity.
- The Local Organiser must upload, onto the e-COST platform, the meeting / Training school attendance list(s) for each day of the approved activity.

Invoices do not need to be submitted by the Local Organiser for the first reimbursement modality.

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

Or

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

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

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

6.1.2. LOS for co-located Action activities

An Action may decide to host multiple meetings and / or a Training School over the same time period in the same venue. In such cases, the series of meetings and the Training School are considered to be two separate

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activities. Therefore, one LOS contribution can be afforded to support the entire series of co-located meeting activities and a second separate LOS contribution can be afforded to support the Training School.

6.1.3. LOS when co-organising activities with another COST Action

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

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

6.1.4. LOS when co-organising COST activities with an external conference

A COST Action may wish to co-organise a COST activity with an external event. In such cases:

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

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

6.2. LOS Eligible Expenses

The following expenses are eligible to be claimed under LOS:

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

6.3. LOS Non Eligible Expenses

The following expenses cannot be claimed under LOS:

1. V.A.T. and any other indirect taxes.
2. Any meal exceeding the one single networking dinner limit.
3. Hotel group reservations.

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

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7. Short Term Scientific Missions (STSM)

7.1. Short Term Scientific Missions (STSM) - Eligibility Rules

Short Term Scientific Missions (STSM) are exchange visits aimed at supporting individual mobility, strengthening existing networks and fostering collaboration between researchers. A STSM should specifically contribute to the scientific objectives of the COST Action, whilst at the same time allowing those partaking in the missions to learn new techniques, gain access to specific data, instruments and / or methods not available in their own institutions / organisations.

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

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

Home Institution	Host Institution
From a Participating COST Country	To another Participating COST Country
	To an approved NNC institution
	To an approved IPC institution
	To an approved EC / EU Agency / an approved European RTD Organisation or an approved International Organisation
From an approved NNC institution	To a Participating COST Country
From an approved European RTD Organisation	To a Participating COST Country

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

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

STSM must respect the following criteria:

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

Specific additional provisions have been adopted by the CSO to encourage the participation of Early Career Investigators (ECI) in STSM.

To qualify for these specific provisions, the following conditions apply:

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

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

7.2. STSM Financial Support

An STSM grant is a fixed financial contribution which takes into consideration the budget request of the applicant and the outcome of the evaluation of the STSM application as determined by the Action Chair (or Vice Chair if the Action Chair is affiliated to the Grant Holder Institution) and / or the STSM Coordinator / Committee. STSM Grants do not necessarily cover all expenses related to performing a given mission. The Grant is a contribution to the overall travel, accommodation and meal expenses of the Grantee.

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

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

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

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

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

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8. COST Action Dissemination

COST provides financial support for the production of dissemination material (see below Section 8.1). In order to be eligible for funding, this material must be a direct result of work performed by the Action and must be authored by different participants from 3 (three) different Participating COST Countries. Dissemination material must reflect the Action's objectives, detailed in the Action's MoU. Wherever possible, material should be made available under an Open Access licence to ensure that the content is made available to a large scientific audience.

Dissemination material generated from work performed by the COST Action fall under two categories:

1. Material produced during an Action's lifetime funded under the COST Grant and paid directly by the Action's Grant Holder - see also Section 8.1.
2. Final Action Dissemination material produced at the end of an Action's lifetime, funded by a specific, additional grant and also managed directly by the Action's Grant Holder - see also Section 8.2.

COST Actions must take care of integrating the COST logo in any material presented at conferences, workshops and events. The objective is to clearly assign the content not only to a COST Action but to COST as a framework. Consequently, whenever COST Actions participate in conferences and events, the Action representative(s) must clearly stipulate that the work has been supported by COST and include the COST logo in their displayed material, in addition to the COST Action logo which certain COST Actions might want to develop.

As the COST Action representatives solely represent themselves or the COST Action, they are not allowed to use the corporate COST PowerPoint template or COST stationery such as Word templates (e.g. for documents or correspondence). Exceptions are dedicated COST Sessions and COST workshops/meetings.

Whenever COST Actions organise (or co-organise) an event, open to external attendance, the COST Action needs to be clearly referenced in the event dissemination materials, including the COST logo, Action number and title. However, COST Actions cannot sponsor events.

8.1. Dissemination Material

The Action's dissemination strategy is detailed in the Memorandum of Understanding (MoU). All dissemination activities and material produced must be in line with the dissemination strategy and the purpose of the COST Action. Dissemination material must be described in the Work and Budget Plan approved by the COST Association and the Management Committee (MC).

COST visual identity and acknowledgements

In order to ensure the material produced complies with the COST corporate identity and properly acknowledges COST funding, please refer to the branding section in the Guidelines for Dissemination, soon available on the COST website. **Please contact Communications Officer Silvia Alexe for assistance in the meantime.**

Dissemination material must be available for audit purposes and copies will be provided to the COST Association upon request.

8.1.1. Eligible expenses

The COST Grant can support expenses related to the production of the following dissemination material:

- Website
- Material for display or distribution (flyers, posters etc.)
- Multimedia content
- Publications (peer reviewed journal papers, book of abstracts, handbooks, guidelines etc.)

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The following expenses can be considered as eligible (excl. V.A.T.):

1. Open Access licenses or 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, layouting, production and distribution costs

COST does not offer sponsorship for COST Action booths at conferences or other events. COST Actions must plan event participation as part of their Work and Budget plan.

COST does not cover expenses for the creation of databases meant for dissemination purposes.

V.A.T is not eligible for reimbursement.

Special provisions for developing and maintaining Action websites

Action websites may vary considerably in scope and content. The allocation of funds supporting website development must be clearly linked to supporting the Action's objectives. Expenses related to Action websites must not exceed EUR 4 500 for the first Grant Period of the Action and EUR 1 500 for the subsequent Grant Periods. Throughout the lifetime of the Action, website expenses cannot exceed a total amount of EUR 9 000. An Action can only have a single website.

The Action website must also display the following items:

1. The COST Association logo and the EU logo (see www.cost.eu/logos)
2. A link to the Action page on the COST website (www.cost.eu/actions/ZZXXXX)
3. A link to the Action's MoU on the COST website
4. A link to the relevant COST rules and guidelines on the COST website (do not post any official documents/templates/guidelines directly on the Action website as such documents are subject to change). Live links should be used pointing readers to official versions of COST documents always hosted on the COST website at www.cost.eu.
5. Links to the names and contact information of the Action Chair, Vice Chair and Science Officer on the Action page on the COST website

8.2. Final Action Dissemination (FAD)

8.2.1. General principles

Final Action Dissemination refers to material produced after the four-year period of the Action in order to share the COST Action results with the wider research community. The material covers examples mentioned in Section 8.1.

Final Action Dissemination material (FAD) must be ordered and paid directly by the COST Action Grant Holder. The COST Association will provide an additional grant of up to a maximum of EUR 10 000 in total (V.A.T. is not eligible) to the COST Action Grant Holder.

Requests for this additional grant need to be sent to the COST Association at the latest 6 months before the official end date of the COST Action, using the template available for download here. The template is also available in the Action Template Centre on the COST Participate page: http://www.cost.eu/participate.

The request must be approved by the MC and the COST Association, who will issue a Grant letter to the COST Action Grant Holder.

The COST Action Grant Holder must ensure that the FAD invoice is paid no later than the date stated in the Grant Letter: 12 months after the official end date of the Action.

The Grant Holder will present to the COST Communications Unit a print preview or digital copy of the material before production to ensure that the branding guidelines have been respected.

The grant payment to the COST Action Grant Holder is only guaranteed once the COST Association has approved that the FAD complies with the Guidelines for Dissemination.

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In case of printed material, the Communications Unit will receive 3 copies upon issuing. Links to digital material will also be provided.

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9. General Principles

9.1. Access to Archived Documents, Controls and Audits

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

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

For Grant Holders opting to use the Strong Authentication feature, the original signed and dated OTRR form and the associated invoices/receipts must be kept by each claimant up to the end date of the audit timeframe specified in the Grant Agreement signed between COST and the Grant Holder (the end date of the audit timeframe is also specified on the reimbursement rules attached to the downloadable reimbursement form generated by each participant).

All Grant Holders managing Actions that opt for the Strong Authentication feature must archive legible copies of all OTRRs and supporting documentation. The requirement applies to all supporting documentation relating to Meetings, Training Schools, Short Term Scientific Missions (STSM), Local Organiser Support (LOS) expenses, Dissemination activities (including Publications expenses) and Other Expenses Related to Scientific Activities (OERSA) up to the end date of the respective audit timeframe. Clear, readable electronic copies of supporting documentation will also suffice.

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

9.2. Derogations

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

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

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9.3. Acknowledging COST

All payments sourced from COST funds throughout the lifetime of the Action must be done so for the sole purpose of supporting approved COST activities. Consequently, approved activities, which are organised / co-organised by COST Actions must formally recognise COST. This recognition requires that the COST logo and at least one of the following: Action logo, Action number, Action acronym etc. must be clearly displayed and promoted on all documents (agendas etc.) and dissemination channels (official website of the Action, the event specific website, presentations, promotional material etc.).

COST must also be recognised on Action outputs and peer reviewed publications that benefit either, directly or indirectly, from COST funding (see Section 8 for the acknowledgement standards relating to Dissemination activities and Publications).

Non-compliance with the above mentioned principles can determine that any related expenses / payments sourced from COST funds are non-eligible. In cases when the above requirements are not fulfilled, the Action Science Officer must be informed and must sanction the omittance.

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