

COST Vademecum (Part B) – Grant System

This COST Vademecum provides the terms and conditions for financing COST activities under the COST Grant System.

1. COST Grant System (CGS)

2. Travel and Subsistence

3. Local Organiser Support

4. Short-Term Scientific Missions (STSM)

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Update history

09/10/2009

Vademecum overhaul

05-25/05/2010

Vademecum overhaul

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1.1. Introduction

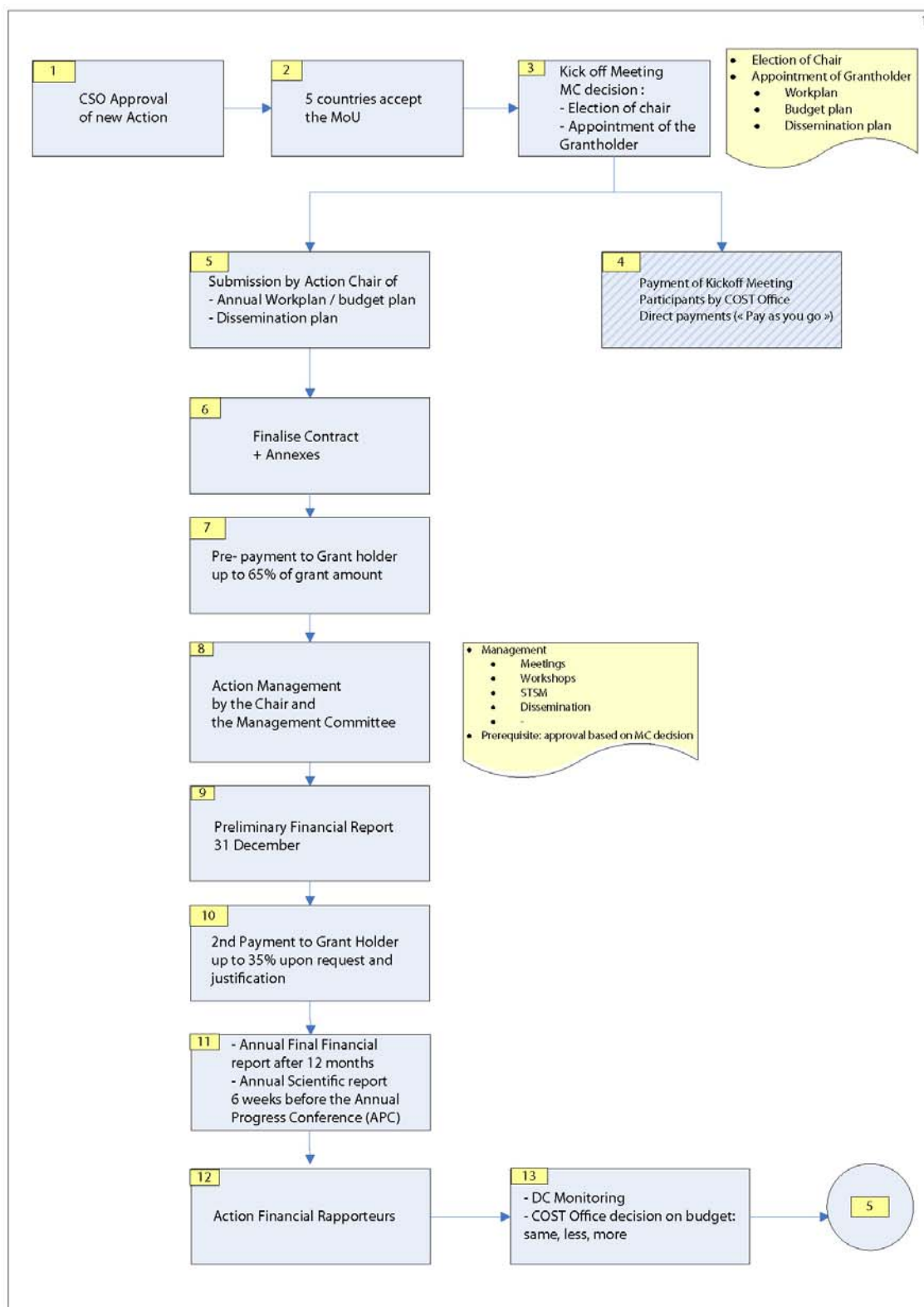
At its 165th meeting, the CSO endorsed the COST Grant System (CGS).

The COST Grant System provides a flexible approach to financing the following COST Action activities in accordance with the COST governing rules: Meetings, Short Term Scientific Missions (STSMs), Training Schools and Dissemination. Any other agreed COST Action activity (e.g. participation of institutions from non-COST countries, including the STSMs linked to Reciprocal Agreements, the final publication and Conference Grant for Early Stage Researchers) is managed under the Pay-as-you-go System; relevant terms and conditions are provided in the COST Vademecum (Part A).

The COST Grant System provides a flexible approach to financing COST Action activities in accordance with the COST governing rules.

COST is financed through the Seventh Framework Programme (FP7) of the European Union and therefore needs to meet the FP7 contractual obligations and to fully comply with the EU financial regulations. The COST Grant Agreement and the rules and procedures described hereafter were drawn up taking into consideration these obligations.

1.2. Flowchart of Action Management



22/01/2010

1.3. The Grant Agreement

The implementation of the COST Grant System is based on a mandatory grant agreement to be signed between the COST Office (represented by ESF) and the Grant Holder selected by the Action Management Committee (MC).

The COST Grant Agreement operates under the following principles:

a) The Grant Holder is responsible for the execution of the financial and scientific administration and coordination of the Action, in line with the COST Vademecum.

b) The COST Grant Agreement is based on:

- a detailed work programme for a defined grant period, and
- a detailed budget proposal for that same defined grant period, as agreed by the MC.

c) The "four eye principle" applies, i.e. request for and approval of payments cannot be executed by the same person.

The Grant Holder must be aware that there are up to four levels foreseen for the control of eligible costs:

- Approval of expenditure statements by the Grant Holder's Finance Officer, who is officially authorized to commit its organisation;
- Control of the appropriate use of funds carried out by two MC members appointed as Action Financial Rapporteurs;
- Verification of Intermediate and Final Financial Reports by the COST Office;
- Possible audits on a sample basis by an ESF Finance Officer and/or an external auditor.

d) Taxes:

Payments made by COST to the Grant Holder are not subject to any tax, in particular VAT. In cases where the local tax authorities of the country of the Grant Holder may have a different analysis, the Grant Holder shall be aware that ESF/COST Office is not responsible for any tax or VAT adjustment applied to the Grant Holder in relation with the payments made under the COST Grant Agreement and will not bear the cost of any such adjustment.

e) On-line reporting:

The management of the COST Grant Agreement will be web based to allow all stakeholders (Grant Holder, MC members, ESF, COST Office) to monitor the COST Actions management progress on-line.

f) The Grant Holder shall execute activities only based on MC decisions. All financial payments need explicit approval from the MC Chair acting on behalf of the MC, taking into consideration the principles of conflict of interest, notably in case the institution of the MC Chair is the Grant Holder (i.e. the Vice-Chair shall represent the related COST Action from a financial point of view).

g) If there is any doubt about the eligibility of specific costs or operation, the COST Office must give its prior approval.

1.4. The Grant Holder

The Grant Holder:

- must be a legal entity (not an individual).
- is selected by the Management Committee (MC) among the institutions of its members. When selecting the Grant Holder, the MC shall consider economic aspects such as bank transfer charges outside Euro-zone, currency exchange costs (it is therefore highly advisable that the Grant Holder opens an account in Euro to handle the COST Grant), tax liability for reimbursements to experts, etc. **The result of the selection shall be recorded in the minutes of the 1st MC meeting.**
- executes the decisions of the MC and ensures that all expenditures comply with the COST Grant Agreement and the COST Vademecum.
- is represented at MC meetings by a MC member. This MC member must ensure the liaison between the MC and the Grant Holder.

For contractual matters, the Grant Holder is usually represented by three persons:

- the **Legal Representative** who has the authority within the institution for signing the COST Grant Agreement (for instance the rector of a university or the managing director of a research institution);
- the **Finance Officer** who has the official financial authority to commit the institution (notably to authorize the payments);
- the **Scientific Representative** who is a member of the MC and the contact point of the institution for any communication required by the COST Grant Agreement.

The scientific, administrative, financial and coordination tasks of the Grant Holder are as follows:

a) Financial reporting

- to keep an attendance list signed by each participant entitled to reimbursement for each day of each meeting;
- to collect the individual reimbursement forms;
- to verify and pay claims by the eligible selected participants attending meetings;
- to ensure that all documents are correctly filed in and archived until 5 years after the end of the Seventh Framework Programme for audit purposes;
- to ensure that all payments have been approved by the MC Chair (or the Vice-Chair if applicable);
- to produce financial reports using the standard reporting tool defined by the COST Office;
- to prepare a progress report on expenditures for the MC.

b) Scientific and Administrative Secretariat

- to fund the Action's activities in accordance with the COST Grant Agreement, MC decisions and the COST Vademecum;
- to attend relevant MC meetings and workshops in the frame of the Action, wherever they are held, if requested by the MC;
- to ensure the preparation of the relevant meetings (e.g. draft agendas, invitations, specific procedures and operating methods as appropriate, minutes of MC meetings as well as activity reports, including the annual and final reports);
- to ensure the distribution of copies of these documents after approval from the MC;
- to provide support for the evaluation of the Action, in liaison with the Chair and the MC.

c) Coordination, liaison

- on request, to inform the COST Office on the development of the COST Action and to provide the proper documentation.

d) Publication, Dissemination

- to assist in editing publications of the COST Action, in liaison with the COST Office;
- to oversee the development and maintenance of the website of the COST Action according to the policy of the COST Office.

Subject to the COST Office approval of the annual Workplan and Budget plan as proposed by the MC, the Grant Holder is entitled to receive a fee of up to 15% of the actual science expenditure in order to cover financial and scientific administration and coordination. A breakdown of these activities shall be indicated in each final financial report.

1.5. Eligible Costs and Reimbursement Rules

The Grant Holder is responsible for the reimbursement of eligible costs to persons, institutions and other claimants eligible for reimbursement within 30 days of the receipt of a claim. Such a claim shall be submitted within 30 days following the event giving rise to the claim, unless otherwise duly justified. Subject to the availability of funds, payments to eligible participants should be made no later than 60 days following the event giving rise to the claim.

Costs are incurred along these following categories:

- Travel and subsistence allowances for meeting participants;
- Organisation of meetings (Local Organiser Support);
- Short-Term Scientific Missions (STSMs);
- Training schools;
- Dissemination, e.g. Scientific Publication, Action website, Action promotion for meetings and training schools, Communication, Outreach activities;
- Other Expenses Related to Scientific Activities (such expenses need an approval from the COST Office). ex: bank fees;
- Financial and scientific administration and coordination of the Action;

Such costs must be claimed in the reporting period that covers the end date of the events they relate to.

According to FP7 Grant Agreement - Annex II General Conditions, the following costs shall be considered as non-eligible and may not be charged:

- VAT and any other indirect taxes (for any specific questions regarding VAT or other indirect taxes, please do not hesitate to consult with the COST Office Financial Controller);
- duties;
- interest owed;
- provisions for possible future losses or charges;
- exchange losses, costs related to return on capital;
- costs declared or incurred, or reimbursed in respect of another project;
- debt and debt service charges, excessive or reckless expenditure.

The full text of the FP7 Grant Agreement is available on the EUROPA website (http://cordis.europa.eu/fp7/calls-grant-agreement_en.html).

1.6. Payment modalities to the Grant Holder

The COST financial contribution shall be paid to the Grant Holder as follows:

- A **first installment of up to 65 %** of the grant after the signature of the COST Grant Agreement;
- A **second installment of up to the remaining amount of the Grant, upon request by the Grant Holder**, and after approval from the COST Office based on a statement and forecast of expenditures.

The COST Office reserves the right to change payment modalities following consultation with the Grant Holder.

Payments are made in Euro, which is the base currency for calculations and payments. The Grant Holder will bear from the scientific secretarial support any currency exchange cost levied by a bank.

Payments can only be made with the full bank account details (account number, IBAN, SWIFT/BIC codes) and after submission of the payment request form.

The bank account details shall be those of the institution only. Thus, no payments can be made to an individual or to a private person's bank account.

1.7. Reporting

- **On 15 January each year:**

The Grant Holder will provide the COST Office with a financial report based on actual accrued costs for the period running to 31 December of the previous year.

- **Within 1 month after the end of the grant period:**

The Grant Holder will provide the COST Office with a **final** financial report.

In case the intermediate report and the final report cover the same period (i.e. for COST Grant Agreement starting on 1 January), the Grant Holder is entitled to only provide the final financial report by 15 January.

- **6 weeks before the Annual Progress Conference of the respective COST Domain:**

A detailed scientific report as specified Guidelines for Assessment, Monitoring, Evaluation and Dissemination of Results of COST Actions (COST doc. 205/08)

If required for the proper implementation of the EC-ESF COST contract, COST reserves the right to request an additional financial report for the period running from the starting date of the on-going Grant Period to the following 1 June. This will have to be provided by the Grant Holder to the COST Office within 2 weeks following the request at the latest.

1.8. Action Financial Rapporteurs

One month after the end of a defined Grant Period, the Grant Holder shall provide COST with a financial assessment (see 1.15) prepared by two Action Management Committee members (or MC substitute) after they have verified that the nature, overall justification and level of expenditure are in line with the agreed Workplan.

The two Action Management Committee members are appointed by the Action Management Committee and act as 'Action Financial Rapporteurs'.

1.9. Control and Audits

The COST Office may, at any time during the COST Grant Agreement and for up to five years after the end of the Seventh Framework Programme, arrange for controls and audits to be carried out, either by external auditors, the COST Office, the Commission services, or the Court of Auditors.

All relevant documents for a control or audit have to be kept for this period of time.

1.10. Amendments

The COST Office reserves the right to change the terms and conditions of the COST Grant Agreement following consultation with the MC and the Grant Holder.

Any changes of the Grant Holder details shall be acknowledged in writing by the COST Office. Any other changes shall be implemented through an amendment to the COST Grant Agreement.

1.11. Termination

The COST Office may terminate the grant agreement after an appropriate notice in case of non-compliance by the Grant Holder with the terms and conditions of the COST Grant Agreement and the COST Vademecum.

1.12. Conflict of Interest

In order to ensure the objectivity and independence of any decision / statement to be taken within the COST Action (notably concerning financial issues), conflict of interests shall be avoided between the MC Chair, the 2 Financial Rapporteurs and the Grant Holder.

1.13. Annex 1: COST Grant Agreement (specimen)

The model COST Grant Agreement is available under:

http://w3.cost.eu/fileadmin/cost_documents/guidelines/Financial_Instruments/CGS/GrantAgreement_v2.3_January2010.pdf (PDF format)

1.14. Annex 2: Workplan/Budget Plan template

The workplan and budget plan template is available under:

http://w3.cost.eu/fileadmin/cost_documents/guidelines/Financial_Instruments/CGS/workplan-budget_plan.rtf (RTF format)

1.15. Annex 3: Financial Rapporteurs Report template

The 2 Financial Rapporteurs shall draw up a short statement on the outcome of the financial review according to the following template:

COST Action [X] Financial Rapporteurs Report	
In compliance with the assignment entrusted to us by the Management Committee of COST Action [X], we did verify the adequacy of expenditures for the period [start date – end date of the Grant agreement] with the agreed work plan in terms of nature and level of spending.	
(a) Based on our investigations, we conclude on a satisfactory use of funds over the lifetime of the Action.	
or	
(b) Based on our investigations, we would like to draw the attention of the Management Committee and the COST Office on the following issues:	
.	
.	
.	
Very truly yours	
MC Financial Rapporteur1 Date and signature	MC Financial Rapporteur2 Date and signature

2. Travel and Subsistence

2.1. Introduction

2.2. Meeting Types

2.3. Meeting Location

2.4. Procedures and Deadlines

2.5. Eligible Participants

2.6. Participants Entitled to Reimbursement

2.7. Eligible Costs - Reimbursement Rules

2.8. Travel Reimbursement Form (specimen)

2.1. Introduction

For meeting participants, a distinction is made between **participants**, **eligible participants** and persons **entitled to reimbursement**.

The participants are all of the people who attend a COST meeting. Among the **eligible participants** (see 2.5), a certain number will be selected by the Chair of the Action on behalf of its Management Committee (MC) as **entitled to reimbursement** (see 2.6).

The rates of reimbursement are strictly limited to the maxima laid down in the rules for reimbursement (see 2.7) and are subject to the availability of funds.

2.2. Meeting Types

The Grant Holder can support travel and subsistence for the participation to the following meeting types:

- **Management Committee (MC) meetings**

Normally 2 per year.

- **Core Group meetings**

Smaller group typically composed of Chair, Vice-Chairs, and Working Group Leaders.

- **Working Group (WG) meetings**

Management Committees subdivides the scientific work of the Action among a limited number of Working Groups according to the size and objectives of the Action. Working Groups may meet on the day before (or the day after) a Management Committee meeting (which may reduce expenses within the Action budget) or, if necessary, at another time.

- **Workshops/Conferences**

Workshops and Conferences are open, in general, to the whole scientific community and act as a showcase for the activities of the Action. It is not the policy of COST to reimburse the travel expenses of all participants in a Workshop or Conference and the reimbursement is normally restricted to the members of the MC or WG subject to the available funds. The reimbursement of the participants should reflect a good balance from the various participating countries. Invited non-COST keynote speakers and session-chairs are eligible for reimbursement.

Each year one of the workshops of the Action should involve Early Stage Researchers (less than PhD + 8 years) to strengthen links with each other and with experienced scientists involved in the management of the Action.

The Workshop/Conference should be organised in conjunction with a Management Committee meeting or other major scientific event in the field of the Action so that all members of the MC can attend and that eligible MC or Domain Committee (DC) members are reimbursed.

- **Training Schools**

Training Schools are aimed at widening the knowledge of the Action activities, providing intensive training on a new and emerging subject and offering familiarisation with unique equipment or know-how in one of the laboratories of the Action.

- **Other COST relevant meeting**

E.g. evaluation panels, editorial meetings, strategic meetings, subject to prior approval by the COST Office.

2.3. Meeting Location

Meetings are organised by the Management Committee (MC) in any COST Country participating in the Action. Exceptions are subject to prior approval from the COST Office.

2.4. Procedures and Deadlines

All requests for organisation of meetings and financing of activities must be sent via the MC to the Grant Holder well in advance of the proposed activity. The Grant Holder must set clear deadlines for meeting applications. Examples of such deadlines are as follows:

- **Small meeting requests:** up to 5 delegates
3 weeks before the proposed meeting

- **Larger meeting requests (such as MC, workshops etc.):**
4 weeks before the proposed meeting

- **Request for Local Organiser Support:**
Normally minimum 6 weeks before the proposed meeting

The Grant Holder endeavours to reply to a request presented in accordance with the set rules within 10 working days.

The organisation of meetings should take into account the COST family friendly policy as defined in doc.295/09, p8 (see <http://www.cost.eu/participate/guidelines>)

2.5. Eligible Participants

2.5.1. Management Committee (MC) Members

Each country participating in an Action can nominate up to 2 MC members (in addition to the MC Chair).

2.5.2. Substitutes

If a MC member cannot attend a meeting, he can be replaced by a substitute nominated by the National Coordinator.

2.5.3. Working Group (WG) Members

The Working Groups usually consist of a small number of researchers selected by the MC or by a procedure decided by the MC.

WG members may be MC members or other researchers from a participating country contributing to the achievement of the objectives of the Action.

2.5.4. External Experts and Invited Speakers

It may be necessary to invite external experts to a COST meeting to address a topic where their expertise would contribute to the objectives of COST.

The reimbursement of invited experts, keynote speakers and session chairs from non-participating countries is normally limited to 4.

2.5.5. Domain Committee rapporteur

The DC Action rapporteur(s) officially nominated by the Domain Committee are invited to the Management Committee meeting.

2.5.6. Other

In exceptional cases, the COST Office reserves the right, at the request of the MC, to analyse the possibility of reimbursement of any person that furthers the interests and aims of COST. This may include participation in special scientific meetings, relevant policy making events and synergy creating activities.

See also section 9. Institutions from non-COST countries in the COST Vademecum (Part A) – Pay-as-you-go System.

2.6. Participants Entitled to Reimbursement

Among the **eligible participants** (see 2.5), a certain number will be selected by the Chair of the Action on behalf of its Management Committee (MC) as **entitled to reimbursement**. This entitlement means that COST will reimburse the travel, meals and accommodation necessary to attend a COST event.

The Chair has the final responsibility for approving the list of participants entitled to be reimbursed and to notify it to the Grant Holder who sends the invitations. The Chair can delegate this approval task to another MC member (i.e. when the MC member is the Local Organiser of a meeting or a member of the MC Core Group)

2.7. Eligible Costs - Reimbursement Rules

2.7.1. Introduction

Participants in COST meetings should arrive/depart as close as possible to the beginning/end date of the meeting. If participants have activities not related to COST either

before or after the meeting, they should indicate the dates and times of departure from and return to their home as if they had only attended the COST meeting.

The participant eligible to receive reimbursement for travel expenses and allowances must declare that he/she has not received or is not entitled to any similar reimbursement or allowance from a third party.

For audit purposes, the Grant Holder or the COST Office may contact the home institution of a participant regarding double payments.

2.7.2. Accommodation

The flat reimbursement rate is **EUR 120 per night** for accommodation and breakfast. The MC may decide to lower this rate in the case of economic accommodation arrangements. The accommodation costs are paid directly by the participant.

The **maximum** number of nights that may be reimbursed equals the number of attended meeting days (as evidenced by the signed attendance list) + 1 (the night prior to the start date of the meeting).

Any deviation will require an explicit justification under "Other/remarks" of the COST Travel Reimbursement Request, supporting documentation, and an approval from the COST Office and the Management Committee prior to the expense

2.7.3. Meals

Lunch (including coffee breaks) and dinner expenses will be reimbursed at a fixed rate of **EUR 20 each**. Meals offered by the Local Organiser will not be reimbursed.

2.7.4. Travel Expenses

2.7.4.1. Introduction

Expenses are funded on the principle of the most economical overall expenditure.

2.7.4.2. Travel by Plane, Train or Long Distance Bus (coach)

- The most economical arrangement has to be considered when traveling by air. Therefore early booking is recommended. Originals or legible photocopies of the ticket (and the invoice if the price is not indicated on the ticket) have to be enclosed to the travel reimbursement request. Business class can only be reimbursed under exceptional conditions and needs the prior approval of the Grant Holder. **Air tickets exceeding EUR 1 200 require prior approval from the COST Office.**
- For local airport transfer, the most economical means of transport should be used.
- The shortest and most economical route by rail or bus between the departure point and the place where the meeting is held must be used. First class rail or bus travel may be reimbursed by the Grant Holder.

- The cost of seat reservations and transport of necessary luggage, and supplements for fast trains and sleepers (instead of hotel) are eligible expenses.

2.7.4.3. Travel by Private or Hire Car

- The use of a private or hire car is reimbursed on the basis of **EUR 0.20 per kilometre** (no fuel, toll, car park etc. will be reimbursed) for one person traveling alone. Where two or more persons are entitled to reimbursement of travel expenses and use the same car, only the person responsible for the car shall be reimbursed at the rate of **EUR 0.30 per kilometre** and the name of the passengers must be declared on the reimbursement form.
- Travel by car for a distance of more than 2 000 km total is normally not reimbursed and in any case no additional accommodation is paid.
- A proof of distance including address of departure has to be attached (print-out from websites such as Via-Michelin, Maporama, Mappy, Google Maps, etc.).

2.7.4.4. Local Transport

For local transport expenses receipts are not required under a total of **EUR 25** (out & return). If the total amount for the entire trip exceeds **EUR 25**, copies of all justifications and receipts have to be added to the reimbursement form.

2.7.4.5. Taxi

Taxi fares are limited to **EUR 40** in total for the entire trip. Receipts are always required. They shall only be reimbursed where no reasonable public transport is available. Any deviation from this rule will require an **explicit justification** and an approval from the MC Chair or the Grant Holder.

2.7.4.6. Others

- If a visa is required to travel to a country, fees may be reimbursed upon production of a supporting document (e.g., receipt from the consular section issuing the visa).
- Parking expenses may be refunded in exceptional cases, when these expenses are economically justified (e.g., in airport parking). In such cases, parking receipts are required.

2.7.5. Remarks

For the reimbursement of travel costs, originals or legible photocopies of **transport tickets** must be provided **with the claim form**. They must clearly indicate **the amount paid** and the **full routing** (showing departure/arrival dates and times).

Only fully completed reimbursement forms shall be considered by the Grant Holder (including fields such as bank account details, meeting ID, departure/arrival dates/times and etc.).

Participants must be registered prior to the meeting in the COST Database:
<https://e-services.cost.eu>.

If the complete reimbursement form is not submitted within 60 days, it is presumed that no claim for payment or for reimbursement of expenses will be requested by the participant.

Originals or legible photocopies of all travel documents must be kept by the participant for five years after the meeting.

Reimbursement is in **euro**, at exchange rate calculated at the meeting date.

The following are some examples of **items not eligible for reimbursement**:

- Registration fees, costs of health, life and luggage insurance are **not** reimbursed;
- Cancellation insurance will only be reimbursed for non-changeable low cost tickets or similar not changeable tariffs;
- Other costs such as telephone calls etc. cannot be reimbursed.

Any other arrangements may be considered in exceptional cases subject to prior approval from the COST Office.

2.8. Travel Reimbursement Form

TRAVEL REIMBURSEMENT REQUEST - version 2.1																																																
1. MEETING DETAILS (ECOST-MEETING-ActionNr-Date-000005)																																																
Meeting Title: Extra Staff Meeting				Start Date:		End Date:																																										
Action Number:																																																
Grant Holder:			E-mail:		Tel:	Fax:																																										
2. PARTICIPANT – information can be found at www.cost.esf.org/e-cost																																																
FAMILY NAME:				FORENAME:																																												
BIRTHDAY:				TEL.:																																												
E-MAIL:				INSTITUTION COUNTRY:																																												
3. BANK DETAILS – In order to be reimbursed, you must first register your IBAN and SWIFT/BIC code via www.cost.esf.org/e-cost																																																
NAME OF ACCOUNT HOLDER:				BIC:																																												
NAME OF THE BANK:				IBAN:																																												
4. ACCOMMODATION AND MEALS																																																
Travel START (door-to-door)			Date:		Time:																																											
Travel END (door-to-door)			Date:		Time:																																											
4a. HOTEL - Total number of hotel nights (fixed rate of €120/night - no receipt required)				Number:		Total (€):																																										
4b. MEALS - Entered by the Grant Holder (fixed rate of €20/meal - no receipt required)																																																
5. TRAVEL EXPENSES																																																
<table border="1"> <thead> <tr> <th>PLANE, TRAIN, Long Distance BUS, etc.</th> <th>From</th> <th>To</th> <th>To (Return)</th> <th>Amount</th> <th>Currency</th> <th>€</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>							PLANE, TRAIN, Long Distance BUS, etc.	From	To	To (Return)	Amount	Currency	€																																			
PLANE, TRAIN, Long Distance BUS, etc.	From	To	To (Return)	Amount	Currency	€																																										
Continue on separate sheet if required																																																
5b. CAR (including rented car)			From:		To	To (Return)																																										
Proof of distance attached including address of departure:					Km (both ways)																																											
Name of additional COST passenger:					Total (€):																																											
Reimbursement fixed rate 0.20 € / km or 0.30 € / km with additional passenger					Total (€):																																											
5c. LOCAL TRANSPORT – For local transport expenses no receipts are required under a total of €25 (single & return). Above €25 (in total for the entire trip) add detailed justification & receipts.																																																
5d. TAXI – Taxi fares are only reimbursed where no reasonable public transport is available and are limited to €40 in total for the entire trip. Receipts are always required.				Amount		Currency €																																										
6. OTHER / REMARKS:																																																

I certify that this travel claim is a true statement of travel expenses incurred by me. I have not been and will not be reimbursed for these expenses from any other source nor have I included any expenses paid or to be paid directly from another source. I am aware that my home institution may be informed about this payment. I have read the rules for travel reimbursement request and agree to them.

Date:

PARTICIPANT SIGNATURE:

3. Local Organiser Support

3.1. Introduction

3.2. Amount Granted

3.3. Eligible and non-eligible costs

3.4. Procedure for Local Organiser Support

3.5. Documents, Control and Audits

3.6. Application Form for Local Organiser Support

3.7. Sample Grant letter

3.8. Sample Payment Request Form

3.1. Introduction

Meetings are defined as in chapter 2 above.

A meeting is initiated by the Management Committee (MC) while its practical preparation and implementation is made by the Local Organiser. The Local Organiser is the local contact person for a meeting, representing an institution of one of the COST countries participating in the Action.

Normally the costs related to the organisation of a meeting are supported by the Local Organiser. Nevertheless, meetings involving more preparation and expenses, in particular Workshops and Conferences, may require specific support from COST.

This support, subject to the availability of funding, is a contribution to the total budget under the terms and conditions described henceforth.

3.2. Amount Granted

COST's support is normally only a **contribution** to the total budget. Therefore the contributions from other sources to the organisation of the Workshop/Conference should also appear on the request (e.g. registration fees, sponsorship, contribution of Local Organiser or others).

A lump sum of up to EUR 30 per participant, based on the signed attendance list(s), will be granted as a fixed grant. Justification of expenses is not required in this case.

In case the Local Organiser requests a contribution above 30 EUR per participant, supporting documents for the justification of expenses and a final breakdown of expenses are required.

The COST contribution shall not exceed EUR 10 000 per meeting (including joint meetings).

3.3. Eligible and non-eligible costs

The following costs are **eligible** for support from COST:

- Room and technical equipment rental;
- Photocopying, printing of programmes, flyers, book of abstracts, proceedings, application forms, draft report etc.;
- Phone, fax, mailing costs for announcements, letters of confirmation;
- Personnel - staff involvement - or temporary recruitment of a secretary if necessary, or services of a Congress organising agency (if the Meeting/Workshop/Conference is very large);
- Local transport - e.g. bus for field trips;
- Coffee breaks and light refreshments;
- One conference meal if deducted from the daily allowance of the reimbursed participants.

Non-eligible costs:

- VAT and any other indirect taxes are non-eligible costs (for any specific questions regarding VAT or other indirect taxes, please do not hesitate to consult with the COST Office Financial Controller)

Contributions from other sources to the organisation of the Meeting shall also appear on the request (e.g. registration fees, sponsorship, contribution of Local Organiser or others).

Once the request has been approved, the Grant Holder will inform the Local Organiser as to the level of approved financing.

Only one grant will be awarded as Local Organiser Support in the case of colocated meetings within the same Action.

In case a publication is financed under the Local Organiser Support, it shall be arranged directly by the Local Organiser. and must follow the requirements of Section “Publications” of this Vademecum - Annex B: Checklist for Print Releases.

3.4. Procedure for Local Organiser Support

3.4.1. Introduction

The request for a Local Organiser Support should normally be made at least 6 weeks before the proposed Meeting, unless otherwise agreed by the Grant Holder.

3.4.2. Before the Meeting

1. the Grant Holder sends the application form to the Local Organiser (see 3.6);
2. the local organiser sends to the MC Chair (with copy to the Grant Holder) the completed application form including a draft budget showing also contributions from other sources, the estimated number of participants and a detailed draft programme (including names of sessions chairpersons and keynote speakers to be invited);
3. the MC Chair (on behalf of the MC) confirms the request to the Grant Holder;
4. the Grant Holder checks/registers the grant amount and sends the grant letter to the Local Organiser;
5. the grant letter is signed by the Local Organiser and returned to the Grant Holder (see 3.7 - sample grant letter).

3.4.3. After the Meeting

Within 4 weeks after the event, the Local Organiser must send to the Grant Holder the following documents:

- a signed Payment Request Form - issued by the Grant Holder - (see 3.8 - Sample Payment Request Form);
- for grants exceeding EUR 30 per participant, a final financial breakdown entered on the application form (see 3.6) and supporting invoices for at least the amount of the requested support;

- signed attendance list(s) with Name, First Name, Institution, Country and e-mail address, for all participants to the meeting;
- a scientific report (max 1 page) containing a summary of the event's scientific output;
- the approval from the MC Chair.

3.5. Documents, Control and Audits

The Grant Holder and the COST Office reserve the right to request additional documents for financial verification and to contact the participants who signed the attendance list.

All relevant financial documents have to be kept for 5 years after the end of Seventh Framework Programme for audit purposes.

3.6. Application Form for Local Organiser Support

(Excel sheet available following this link:

http://w3.cost.eu/fileadmin/cost_documents/guidelines/2-financial_instruments/Meeting_Support_template.xls)

APPLICATION FOR LOCAL ORGANISER SUPPORT

COST Action:

Place:

Dates:

Local organiser

Institution:

Responsible person:

BREAKDOWN OF EXPENSES

Item
[1] Room and technical equipment rental
[2] Photocopying, printing of programmes, flyers, book of abstracts, application forms, draft report, proceeding etc.
[3] Phone, fax, Mailings cost for announcements, letters of confirmation
[4] Personnel - staff involvement- or temporary recruitment of a secretary if necessary, or services of a congress organising agency (if the conference/Workshop is very large)
[5] Local transport - e.g. bus for field trips
[6] Coffee breaks and light refreshments
[7] Meals/dinners if deducted from the daily allowance of the reimbursed participants
[8] Others (please specify)
Total

APPLICATION

Total expenses (Budget)			Local Organizers Contribution	Requested COST support
local curr.	Currency	€		
		0.00	0.00	0.00

Final breakdown (to be fill in after the meeting)

Total expenses	COST support	Annex
€	€	
0.00	0.00	

3.7. Sample Grant letter

(document produced by the COST Office IT tool)

LOCAL ORGANISER SUPPORT GRANT LETTER - version 1.1

Reference COST-Workshop-ECOST-MEETING-ActionNr-DATE-Nr

Local Organiser:Name

Date:

XX/XX/20XX

Place:

Institution, City [Country]

Grant Amount:

509

Dear Mr Roberto Alvarez,

With reference to your application for a Local Organiser Support grant within the COST scientific programme on 2009/10/15, I am pleased to notify you that the Management Committee of the COST Action Nr (Name of Action) has awarded a grant amounting to the fixed sum of EUR X to:

Account Holder: GH

Address: GH

Country: Belgium

IBAN: Nr

Swift/BIC: Nr

for the ECOST-MEETING-ActionNr-Date-000005 meeting in Institution, City [Country] the date to be spent according to the rules for the organisation of COST meetings. (see COST Vademecum 2 - Local Organiser Support, <http://cost.esf.org>).

Please note that all taxes, including VAT, are not eligible costs.

Above 30 EUR per participant supporting documents for the justification of expenses are required.

You are requested to inform the Grant Holder whether you intend to take up this grant or not. To do so, please sign one copy of this letter and return it to the Grant Holder at the above address, and retain the second copy for yourself.

No later than 4 weeks after completion of the workshop, you must send your scientific report together with the completed payment form to the Grant Holder in order to be eligible for reimbursement.

Yours sincerely,

Name

e-mail address

Phone

Grant Holder

I read the document "2 - Local Organiser Support" for the support for the organisation of a COST meeting and I accept this offer.

Local Organiser name: Name

Signature: Date: XX/XX/20XX

3.8. Sample Payment Request Form

(document produced by the COST Office IT tool)

LOCAL ORGANISER SUPPORT PAYMENT REQUEST FORM - version 1.1

COST Action: ActionNr (ActionName)
Local Organiser's Name and Institution: Name
Event period: From : Start Date to End Date
Place: Institution, City, Country
Reference Code: COST-Workshop-ECOST-MEETING-ActionNr-Date-000005
Claimed amount of the grant: X EUR

The above event has been successfully completed and the following documents are attached:

- Final financial statement for grants above 30 EUR per participant.
- Scientific report
- Approval by the Management Committee (email)
- Bank details as follows:
 - Name of the account holder: GH
 - Name of Bank: Name
 - Account number: Nr
 - Bank SWIFT code or BIC: Nr

Date: Signature:

4. Short-Term Scientific Missions (STSM)

4.1. Objectives

4.2. The Applicant

4.4. Home and Host Institution

4.4. Duration

4.5. Financial Support

4.6. Registration and Deadlines

4.7. Assessment

4.8. Approval

4.9. Deviation

4.10. How to Submit a STSM Application

4.11. After the STSM

4.12. Sample Application Form

4.13. Sample Grant letter

4.1. Objectives

The aim of a Short-Term Scientific Mission (STSM) shall be to contribute to the scientific objectives of a COST Action.

These Missions (Exchange Visits) are aimed at strengthening the existing networks by allowing scientists to go to an institution or laboratory **in another COST Country** to foster collaboration, to learn a new technique or to take measurements using instruments and/or methods not available in their own institution/laboratory. They are particularly intended for young scientists.

An Action should normally set up at least 4 STSMs per year.

4.2. The Applicant

The selection of the applicant is the responsibility of the Management Committee (MC) of the Action.

The **Applicant** should normally be engaged in a programme of research as a postgraduate student or postdoctoral fellow or be employed in an institution of a COST Country having accepted the MoU of the Action. This institution shall be actively participating in the COST Action.

For the period of the STSM neither the MC of the Action, the COST Office nor the Grant Holder may be considered as the employer and grantees must make their own arrangements for all health, social, personal security and pension matters.

4.3. Home and Host Institution

The home and the host institution can be public or private.

A STSM may only be approved:

- from a home institution in a COST participating country to a host institution in another COST participating country or to a formally approved host institution in a non-COST country.
- from a formally approved home institution in a Near Neighbour country to a host institution in a COST participating country.

In exceptional cases, the COST Office reserves the right to analyse the possibility of reimbursement of any person designated by itself or by the Management Committee of an Action or by a Domain Committee to further the interests and aims of COST.

Short-Term Scientific Missions between different Actions may be considered by the Management Committees of both Actions.

The Applicant is responsible for obtaining the agreement of the host institution, before submitting his/her application.

4.4. Duration

Short-Term Scientific Missions, **minimum one week (5 working days), maximum 3 months**, shall be made within the time frame of the operation identified in the proposal and within the period of the respective Action.

For Early Stage Researchers (less than PhD + 8 years) the Management Committee may approve an extension to a duration beyond 3 months, but normally not more than 6 months in total.

4.5. Financial Support

The financial support is a contribution to the costs of a STSM and may not necessarily cover all the costs in each case. The grant should normally cover only travel and subsistence.

The financial contribution for a STSM will be a fixed grant based on the Applicant's budget request and the evaluation of the application by the STSM assessment committee. An amount of EUR 60 to 90 for the daily allowance in particular for longer stays and EUR 300 for the travel is recommended but not obligatory. The total of a STSM shall normally not exceed EUR 2 500 up to 3 months (or EUR 3 500 for Early Stage Researchers – above 3 months). **Any exception needs special justification and prior approval from the COST Office.**

In any case the costs associated with the STSM must not exceed the limits set in the rules for reimbursement by COST of expenses for experts eligible for reimbursement (see 2. - Travel and Subsistence).

An advance payment may be made in exceptional circumstances, which will require additional special justification.

4.6. Registration and Deadlines

The Applicant must use the **on-line registration tool**. (see 4.10 - How to submit an application).

Applications may be submitted according to the schedules stipulated by the MC of the relevant Action, bearing in mind that delays must be taken into account for the assessment and administrative procedures.

The application together with the MC approval should be sent to the Grant Holder and respect the deadline set by the Grant Holder (e.g., at least 4 weeks before the STSM starts).

4.7. Assessment

a) The MC of the Action will make the scientific and budgetary assessment and take the final decision.

The MC may formally delegate these tasks to :

- the STSM coordinator or,
- a sub-group of its members (assessment panel), which may vary from time to time and from scheme to scheme, to assess proposals and to agree on those which may be funded.

It is recommended that this assessment panel consists of more than two people in order to avoid a conflict of interest, in addition to one person who is authorised to take the decision (normally the Chair). External advice may be sought.

MC members and other assessors should not involve themselves in the assessment of proposals in which they have a personal or financial interest. In exceptional circumstances (e.g. uniqueness of expertise), such a bar may be waived with the agreement of the other members involved, if the interest is declared and considered not to compromise the potential decision.

b) The MC should agree the criteria for assessing applications in line with the Action objectives. Wherever possible, these criteria should be made known in advance to potential applicants. It is expected that every care will be taken to avoid any bias on the grounds of gender, age or nationality.

4.8. Approval

The MC Chair or the STSM coordinator is responsible for circulating the application for decision to the assessment panel.

The MC Chair or the STSM coordinator has to inform the Grant Holder about the decision. After checking the application for the compatibility with the existing rules and procedures the Grant Holder will inform the Applicant about the outcome of the assessment and will arrange the necessary formalities for the issue of the grant in case of a positive result and availability of funding.

The decisions and assessments regarding all STSM applications shall be reported to the next MC meeting **and recorded in the minutes of the meeting**.

4.9. Deviation

Any deviations and exceptions from this procedure may be considered, provided that they contribute to the scientific objectives of the Action. They require prior approval from the COST Office.

4.10. How to Submit a STSM Application

4.10.1. Registration by the applicant

The Applicant must use the **on-line registration** tool to register their request for an STSM (see <https://e-services.cost.eu/stsm>). The following information has to be encoded with the registration:

1. the Action number;
2. the title of the planned STSM;
3. the start and end date;
4. the applicant's details, including key academic details and workplan;
5. the applicant's bank details;
6. the host institution's ;
7. financial data (amount for travel and subsistence).

4.10.2. Formal STSM application and annexes

After encoding the information via the on-line registration tool will issue a formal STSM application (see 4.12) which has to be downloaded and sent by the applicant electronically (by e-mail as attachment) together with any necessary document which the Applicant may regard as helpful in supporting the application at the evaluation process (such as CV, full workplan, list of publications, motivation letter, letter of support from the home institute etc.) to:

- the future Host institution of the STSM;
- the MC Chair or the STSM coordinator.

4.10.3. Assessment of the STSM

The MC Chair or the STSM coordinator will arrange the assessment of the STSM.

4.10.4. Approval from the Management Committee

The MC Chair or the STSM coordinator informs the Grant Holder that the proposed STSM has been approved in the form of an e-mail stating:

"Subject: STSM Reference number, COST Action number, grantees name

On behalf of the Management Committee of the above COST Action I would like to inform you after evaluation that:

- a) the attached request for an STSM has been approved and;
- b) a grant of EUR x has been recommended and;
- c) the host institute accepted the proposal."

4.10.5. The Grant letter (see 4.13 - sample)

The Grant Holder will send to the Applicant a **Grant letter** in which he/she is informed about:

- a) the approval of the STSM and;
- b) the level of the financial grant given.

The Applicant has to return this **Grant letter**, after accepting the grant with his/her signature.

4.11. After the STSM

4.11.1. STSM Scientific Report

After completion of the STSM the grantee is required to submit to the host institution and MC Chair (or the STSM coordinator) a short scientific report on the visit **within 4 weeks after his/her stay**.

It should contain the following information:

- purpose of the STSM;
- description of the work carried out during the STSM;
- description of the main results obtained;
- future collaboration with host institution (if applicable);
- foreseen publications/articles resulting or to result from the STSM (if applicable);
- confirmation by the host institution of the successful execution of the STSM;
- other comments (if any).

4.11.2. Approval and payment

The MC Chair or the STSM coordinator is responsible for:

- approving the scientific report
- informing the Grant Holder that the STSM has been successfully accomplished and that the grant can be paid.

The e-mail should include the scientific report and state:

"Subject: STSM Reference number, COST Action number, grantee's name

On behalf of the Management Committee of the above COST Action I would like to inform you that:

- 1) The above STSM has been completed from <Start date> to <End date>
- 2) The scientific report has been approved by the MC and Host.
- 3) The amount of EUR X can be paid"

After reception of the approval mail and the scientific report, the Grant Holder will execute the payment of the fixed grant directly to the grantee or the host institution as requested in the application.

4.12. Sample Application Form

(document produced by the on-line tool available on the COST website)



COST STSM Application Form

To be sent by the applicant as attachment by e-mail together with all the documents he/she would like to submit to support the application (full CV, detailed work plan, motivation, etc.) to the

- * Host (who will send his agreement to host the applicant to the MC Chair)
- * MC Chair for evaluation and approval

COST Office

Science Officer: *Name of Science Officer*

Telephone nr, e-mail address

COST MC Chair: *Name, e-mail address*

COST STSM Reference Number: COST-STSM-999-111

Period: xx/xx/200x to xx/xx/200x

COST Action: 999

STSM Applicant: *Name, Organisation Name, City(Country)*
e-mail address

STSM Topic: *Name of the Topic*

Host: *Name, Organisation Name, City(Country), e-mail address*

Budget Request:

Travel	X €
Subsistence (hotel/meals)	X €
Total	X €

Short CV (date of birth, higher education degree, further qualifications, max 250 ch.):

Aridus e lasso venient adhelitus ore, metaque erat longe: tum denique de tribus unum fetibus arboreis proles Neptunia misit. Obsituit virgo nitidior cupidine pomi declinat cursus aurumque volubile tollit praeterit Hippomenes: resonant spectacula plausu.

Work Plan Summary (keywords, max 250 ch.):

Illa moram celeri cussataque tempora cursu corrigit atque iterum iuvenem post terga relinquit: et rursus pomi iactu remorata secundi consequitur transitque virum. pars ultima cursus restabat: 'numc' inquit 'ades, dea muneris auctor' inque latus campi, quo tardius illa rediret.

I request the approval of a COST Short Term Scientific Mission as described above

Applicant

Name of applicant

Date

4.13. Sample Grant letter

(document produced by the on-line tool available on the COST website)

Name
Institution, City, Country
e-mail address

Reference Short Term Scientific Mission, COST Action ActionNr
Beneficiary: Name, Institution, City, Country
Host: Name, Institution, City, Country
Period: from Start Date to End Date Place: City (Country)
Reference code: COST-STSM-ECOST-ActionNr-Date-000000

Dear Ms Maria CATARINA CAMPOS,

With reference to your application for a Short Term Scientific Mission within the COST scientific programme on Action Name,
we are pleased to notify you that the Management Committee of the
COST Action **ActionNr** has awarded a grant amounting to the fixed sum of **EUR X** to:

Account Holder: Name
Address, City

Country
IBAN Nr
Swift Nr

for the above STSM.

You are requested to inform us whether you intend to accept this grant. To do so, please sign one copy of this letter and return it to us at the address below, and retain the second copy for yourself. Please note that you should start your mission at the foreseen time and inform us about any change in advance of the mission.

No later than 4 weeks after completion of your mission, you must send your scientific report together with the host report to the Chair or the member of the Management Committee responsible for the STSM. A copy of these two reports should also be sent directly to us in order to be eligible for reimbursement.

Please note that the guidelines for the Short Term Scientific Missions for COST can be found at <http://www.cost.esf.org/guidelines>.

Yours sincerely,

Tester E-COST

on behalf of COST Office

Grant Holder of the COST Action ActionNr

I read the rules for the execution of the COST Short Term Scientific Missions and I accept this offer.

Scientist name: Name
Signature: Date:

5. Training Schools

5.1. Introduction

5.2. Duration

5.3. Eligible Costs

5.5. Procedure

5.5. Sample Grant letter to the Local Organiser

5.6. Sample Grant letter to the Trainee

5.7. Sample Payment Request Form

5.1. Introduction

Training Schools within the framework of the Action topic are aimed at:

- Widening the knowledge of the Action activities.
- Providing intensive training on a new and emerging subject.
- Offering familiarisation with unique equipment or know how in one of the laboratories of the Action.

Training Schools are not intended to provide general training or education. Those attending a Training School are typically – but not exclusively – young researchers from across Europe. Furthermore, Training Schools may also cover appropriate re-training as part of life-long learning.

A Training School can also take the form of an Early Stage Researchers (less than PhD + 8 years) network created as a "think tank".

COST support covers organisation of the school and participation support to both trainers (including external experts) and trainees.

5.2. Duration

The duration of a Training School is normally between three days and two weeks.

5.3. Eligible Costs

5.3.1. Local Organiser

The following items can be reimbursed: general support required for the organisation such as meeting room rental, lecture materials, secretarial support, coffee breaks, technical equipment as well as consumables specifically purchased for the Training School. The rules are the same as for Local Organiser Support (see 3 – Local Organiser Support).

5.3.2. Trainers

The following items can be reimbursed: travel and subsistence for trainers - same as for participants to COST meetings (see 2 - Travel and Subsistence), but no lecture fee.

5.3.3. Trainees

The following items can be reimbursed:

- Individual grants for trainees - amount to be decided by the Management Committee. Each grant cannot exceed the normal reimbursement rates of COST (see 2 - Travel and Subsistence);

- General guide: the individual grants should be based on the most economic accommodation arrangement and on the most economic travel arrangement (see also 4.5 STSM - Financial support).

5.4. Procedure

5.4.1. Local Organiser

The request for a Training School has to be sent via the Chair of the Management Committee (MC) after MC approval of the programme and the list of paid participants to the Grant Holder with the following documents:

- Detailed programme and aim of the Training School;
- Support statement from the MC (e.g., the Minutes of a MC meeting);
- Detailed financial support request for the organisation of the meeting;
- List of trainers with contact details;
- List of trainees that have been selected by the MC to be entitled to the individual grants for attending the Training School, along with the amount of the grants;
- Contact details.

After receipt of the above documents, the Grant Holder will send Grant letters to the Local Organiser and to the trainee(s). In case general organisation support is granted, then a scientific report will be requested after completion of the Training School.

Exceptions must be duly justified and must be accepted by the COST Office prior to the event.

5.4.2. Trainers and Trainees

Trainers and trainees will be requested to register on the e-COST application

5.5. Sample Grant letter to the Local Organiser

(document produced by e-COST application)

LOCAL ORGANISER SUPPORT GRANT LETTER - version 1.1

Reference COST-Workshop-ECOST-TRAINING_SCHOOL-ActionNr-Date-000004

Local Organiser: Name

Date: XX/XX/20XX

Place: Institution, City, Country

Grant Amount:

Dear Name,

With reference to your application for a Local Organiser Support grant within the COST scientific programme on Date, I am pleased to notify you that the Management Committee of the COST Action ActionNr (ActionName) has awarded a grant amounting to the fixed sum of EUR X to:

Account Holder: Name

Address: Address

Country: Country Name

IBAN: Nr

Swift/BIC: Nr

for the ECOST-TRAINING_SCHOOL-ActionNr-Date-000004 meeting in Institution, City, Country the Date to be spent according to the rules for the organisation of COST meetings. (see COST Vademecum 2 - Local Organiser Support, <http://cost.esf.org>)

Please note that all taxes, including VAT, are not eligible costs.

Above 30 EUR per participant supporting documents for the justification of expenses are required.

You are requested to inform the Grant Holder whether you intend to take up this grant or not. To do so, please sign one copy of this letter and return it to the Grant Holder at the above address, and retain the second copy for yourself.

No later than 4 weeks after completion of the workshop, you must send your scientific report together with the completed payment form to the Grant Holder in order to be eligible for reimbursement.

Yours sincerely,

Name

e-mail address

Phone

Grant Holder

I read the document "2 - Local Organiser Support" for the support for the organisation of a COST meeting and I accept this offer.

Local Organiser name: Name

Date

Signature

5.6. Sample Grant letter to the Trainee

(document produced by e-COST application)

Reference Training School, COST Action ActionNr
Beneficiary: Name
Host: Name, Institution, City (Country)
Period: from Start Date to End Date Place: City (Country)
Reference code: COST-TS-ECOST-TRAINING_SCHOOL-ActionNr-Date-000004

Dear Mr Roberto ALVAREZ,

With reference to your application for a Training School within the COST scientific programme on Action Name,
we are pleased to notify you that the Management Committee of the COST Action
ActionNr has awarded a grant amounting to the fixed sum of **EUR X** to:

Account Holder: GH
Address: GH
Country: Country Name
IBAN: Nr
Swift: Nr

for the above Training School.

You are requested to inform us whether you intend to accept this grant. To do so, please sign one copy of this letter and return it to us at the address below, and retain the second copy for yourself.

Please note that the guidelines for the Training School for COST can be found at <http://www.cost.esf.org/guidelines>.

Yours sincerely,

Tester E-COST

on behalf of COST Office

Grant Holder of the COST Action ActionNr

I read the rules for the execution of the COST Training Schools and I accept this offer.

Scientist name: Name

Signature: Date:

5.7. Sample Payment Request Form for Local Organiser support of a Training School

(document produced by e-COST application)

LOCAL ORGANISER SUPPORT PAYMENT REQUEST FORM - version 1.1

COST Action: ActionNr (ActionName)
Local Organiser's Name and Institution: Name - Institution, City, Country
Event period: From : Start Date to End Date
Place: Institution, City, Country
Reference Code: COST-Workshop-ECOST-TRAINING_SCHOOL-ActionNr-Date-000004
Claimed amount of the grant: X EUR

The above event has been successfully completed and the following documents are attached:

- Final financial statement for grants above 30 EUR per participant.
- Scientific report
- Approval by the Management Committee (email)
- Bank details as follows:
 - Name of the account holder: Name
 - Name of Bank: Name
 - Account number: Nr
 - Bank SWIFT code or BIC: Nr

Date: Signature:

6. Publications

6.1. Introduction

6.2. Action Dissemination Tools and Publications

6.3. Final Action Publication

6.4. Step-by-step Guide

6.5. Annex A: Checklist for Requests for Dissemination Tools and Publications

6.6. Annex B: Checklist for Publications

6.7. Annex C: COST Office Publications Purchase Order

6.8. Annex D: Author's Declaration

6.1. Introduction

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

COST expects Actions to develop a dissemination strategy to encourage public discussion about their work and to ensure that the results of the research work reach the European Society and policy-makers. It provides financial support for the production of dissemination tools and publications to increase the effectiveness of research results on a European level.

A thorough planning of the dissemination strategy for each Action is required in the annual workplan. Actions can only enter into binding financial commitments for activities taking place in the year covered by the running Grant Agreement.

COST supports the production of dissemination tools and publications such as books (hard copy or electronic), brochures, flyers and electronic devices such as DVDs and CD-ROMs as well as activities in line with the COST Outreach Strategy (COST doc [207/08](#)) approved by the CSO at its 170th meeting on 12-13 March 2008.

Information flow: The first point of contact for the Action is the COST Office Science Officer. He or she remains the contact person throughout the process. Please also send a copy of your correspondence to: publications@cost.eu.

The production of dissemination tools and publications can either relate to:

A) Action publications: funded directly by the COST Action budget, described in part 6.2 Action dissemination tools and publications.

Or

B) Final Action publication: funded directly by the COST Office from the shared central budget (i.e. budget line "Dissemination, Publications, Conferences and Outreach"), described in part 6.3 Final Action Publication.

6.2. Action Dissemination Tools and Publications

In general, different kinds of dissemination tools and publications can be included in the Action budget:

1) High-level publications produced by a renowned publisher for high level publications (usually books or journals). This type includes the purchase of existing publications. and open-access web-based publications follow the same process as printed publications.

2) Multi-media material such as CD-ROMs or films.

3) Printing of conference or workshop proceedings as described in Chapter 3 of this Vademecum. The publication of proceedings should be arranged directly by the organiser or delegate responsible for the Workshop/Conference and not via the COST Office. The requirements Annex B: Checklist for Publications must be followed. Please refer to Chapter 3 for further details of the procedures to follow.

COST either covers costs for production and distribution by a printing house, or for the purchase of a fixed number of copies of the Action's high-level publication by a publishing house. Related costs such as graphic design, proofreading, translation and editing are normally not covered. Exceptions need specific approval from the COST Office.

COST strongly recommends environmentally-considered materials such as ecofriendly non-chlorine free paper or e-books and print-on-demand solutions.

Action dissemination tools and publications are the responsibility of the Management Committee.

The procedures are described in the Step-by-step Guide.

6.3. Final Action Publication

Final Action Publications (on average one publication per Action to the amount of typically maximum EUR 10 000) are foreseen to be funded directly by the COST Office if:

- the Action includes a request for a final Action publication in the budget plan of its final year;
- the Action Chair/MC submits a specific request for a final Action publication to the COST Office (Science Officer) no later than 6 months before the official end date of the Action.
- the Action Chair/MC ensures that the invoice for the Final Action Publication will reach the COST Office no later than 12 months after the official end date of the Action.

COST either covers costs for production and distribution by a printing house, or for the purchase of a fixed number of copies of the Action's high-level publication by a publishing house. Related costs such as graphic design, proofreading, translation and editing are normally not covered. Exceptions need specific approval.

COST strongly recommends environmentally-considered materials such as ecofriendly non-chlorine free paper or e-books and print-on-demand solutions.

The information flow remains as described above.

6.4. Step-by-step Guide

Please refer to the Step-by-step guide Section 5.4 of COST Vademecum Part A.

Note that cooperation with the European Union's publisher (OPOCE) does not apply for COST Actions under the Grant System (sections 6.4.3.1, 6.4.4.1, 6.5.1 and 6.8 do not apply. References to OPOCE in other sections do not apply either).

Upon conclusion of the final step in the process, the COST Office would like to receive 5 hard copies.

6.5. Annex A: Checklist for Requests for Dissemination Tools and Publications

As described in the same section of COST Vademecum Part A with the exception of section 5.5.1 which does not apply.

6.6. Annex B: Checklist for Publications

As described in the same section of COST Vademecum Part A.

6.7. Annex C: COST Office Publications Purchase Order

As described in the same section of COST Vademecum Part A.

6.8. Annex D: Author's Declaration

As described in the section 5.9 (annex E) of COST Vademecum Part A.

7. General Principles

7.1. Documents, Controls and Audits

7.2. Exceptions

7.1. Documents, Controls and Audits

The Grant Holder and the COST Office reserve the right to request additional documents for financial verification.

All relevant financial information shall be kept for 5 years after the end of the Seventh Framework Programme for audit purposes.

7.2. Exceptions

Any deviation from the rules stated in this Vademecum requires the explicit written agreement from the COST Office.