

Beneficiary Register: SME Self-Assessment Guidance

User's Guide

21/09/2015 (Beneficiary Register version 5)

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The SME Self Assessment

The assessment on the 'SME' status is based on the SME Recommendation ([COM Recommendation 2003/361/EC](#)) on the definition of Micro, Small and Medium-sized Enterprises.

The SME Self-Assessment Wizard is a questionnaire, which enables your organisation to determine whether it qualifies as an 'SME' (Micro, Small and Medium-sized Enterprise) according to the relevant rules of the European Commission. It will "ask" you a series of easy-to-answer questions in a logical sequence¹.

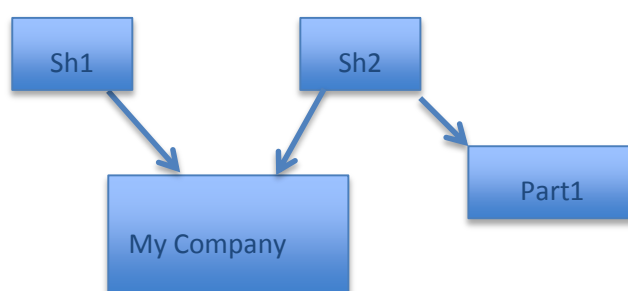
Getting familiar with some important keywords

The questions asked by the SME Self-Assessment Wizard will help you to describe the family tree ("ownership structure") of your organisation. Furthermore, it will help you assess whether your organisation meets the thresholds set by the SME Recommendation.

The SME Wizard will first ask questions about your organisation (called the '**Main Organisation**' or 'My company'), and after about the other relevant entities to which it is related.

In the example below, My Company is owned by two other companies (the **Shareholders**) called Sh 1 and Sh 2. The company Sh2 holds shares/voting rights in another company called Part 1. In this example, you would be asked to enter financial data for all the 4 entities.

Of course it could happen that, your organisation controls or influences the business of another entity (or is controlled or is influenced by the business of another entity), even without holding shares or voting rights. Such cases fall under the label "**Other Relationships**") in the wizard.




¹ The answer you will provide determines the next question in the sequence.

Getting started

The first 2 screens provide you with all the necessary information you need to complete the wizard including the references to the legal basis and latest news on the tool (new functionalities, some workarounds). Please read them carefully.

Welcome to the SME self-assessment questionnaire


Objective
The objective of this questionnaire is to determine whether your organisation qualifies as a small and medium sized enterprise as defined in the EU Recommendation 2003/361/EC



Before Starting

Before starting the online questionnaire it is strongly recommended that you:

- Carefully read through both the SME recommendation and the [SME user guide](#)
- Prepare the relevant financial documents of the last closed accounting period (Balance Sheet, Profit and Loss Accounts, Staff Headcount) of your organisation and any other organisation that might be directly or indirectly related to it.




What's next?

Once you have completed the SME self-assessment wizard, a statement summarising the data and result of the SME assessment will be issued and transmitted to the relevant EC services.

Please note that the Commission reserves the right to perform ex-post checks on organisations declared as an 'SME' on the basis of this questionnaire. Your organisation might therefore be required in that case to submit the financial documents justifying the figures introduced in the questionnaire.

Once you have read and understood the SME Recommendation and collected the relevant financial documents, you will be ready to start the SME questionnaire.



Need help?

Most types of corporate structures can be easily encoded in the system. Please contact our helpdesk if your organisation's corporate structure is not supported by the wizard.

If you encounter any difficulty while going through the steps of the SME self-assessment, please contact the following helpdesks:

- For IT related matters, please submit your question to the [Participant Portal IT helpdesk](#)
- All other queries can be addressed to the Research Enquiry Service "[Horizon 2020 helpdesk](#)"

The SME Self Assessment Wizards's User manual is available at this link [SME Self Assessment User Manual](#)

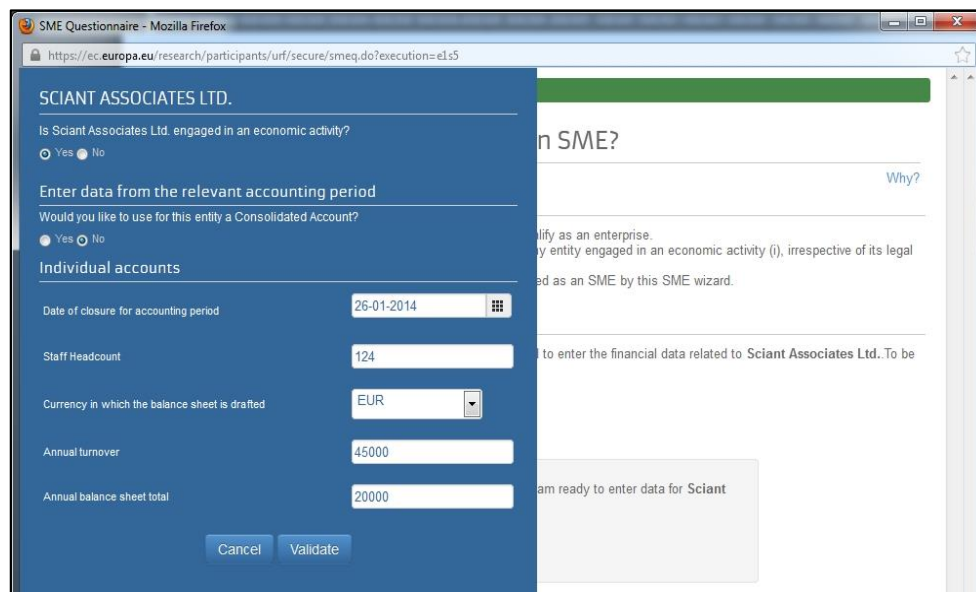
Next »

Filling in the wizard: a step by step approach

Step 1 My Organisation

First you will be asked to fill in information concerning "My company", the main organisation.

Every time you are being asked to enter data, a blue pane will slide in from the left hand side.



The system starts asking (and this is just for the Main Organisation) about the economic activity of "My company".

The main entity must be engaged in economic activity² to qualify as an SME.

Once you declared that the company has an economic activity, you must enter the financial data and information on staff headcount (either via individual financial statements or consolidated accounts³).

Once you entered the data, click on **Validate** to submit it.

Important: by pointing the mouse on a specific word a question mark might appear indicating that additional information is available through a mouse click. This information will disappear by clicking once again the text

² Refer to chapter "no economic activity"

³ Refer to chapter "using consolidated accounts"

Step 2: The System asks you about Shareholders

Now the system will ask you to enter information concerning the "family tree" of "my organisation"(in this case the name of the company is Gversion572). The first question is about **Shareholders**.

What information to provide next

Current Organisation: **GVERSION 572**

Enter information about:

Shareholders | Participations | Other Relationships

Please look at the list of possible shareholders below and select the appropriate option

- Public bodies
- Private entities holding 25% or more of Shares/Voting Rights
- Private persons ("natural persons") holding above 50% of Shares/Voting Rights

Choose one of the 2 options to proceed

If any of the listed entities hold shares or voting rights in **GVERSION 572**, please click below:

Add shareholder

If you want to declare that no entity of the listed types hold shares or voting rights in **GVERSION 572**, please click below:

No shareholders to add

Overview of ownership

Name	%	Type	Financial Data	Actions	S	P	O
GVERSION 572		MO	TO: 600,000.00 EUR BS: 50,000.00 EUR Employees: 15.00		-	-	-

Back to URF | Save Draft | Quit Wizard

When adding Shareholders, the system will ensure that you enter the totality of the shares (i.e. 100%).

To help you enter just the relevant information, the question will indicate, every time, the categories (with minimum percentages) of the entities whose data will contribute to calculation.

It is therefore very important to **carefully read** the different options before clicking on the **Add Shareholder** button.

Once clicked, a new blue pane will slide in and you will be asked to enter information concerning the shareholder⁴ (name of the entity, legal/natural person, public/private and if it is belonging to one of the investors' categories)

In case there are no (or no more) shareholders to be added (from the listed categories), clicking on the button **No shareholders to add** will complete the ownership structure of the current entity. The system will in this case create a "**Minor Shareholders**" category in the ownership structure which means that the rest of the ownership (or even the 100%) is not relevant to the calculation.

In the example, we add a 60% shareholder named GG572 Holding.

⁴ Refer again to chapter "using consolidated accounts" in case you wish to use them.

Step 3: The System asks you about Participations

Once you have completed the shareholder section you are asked to provide information on Participations.

What information to provide next

Current Organisation: **GVERSION 572**

Enter information about: **Shareholders** **Participations** **Other Relationships**

Shares/voting rights held by GVERSION 572 in other entities

Choose one of the 2 options to proceed

If GVERSION 572 **holds** 25% or more of the capital or voting rights in another entity, please add this entity by clicking below

Add participation

If GVERSION 572 **does not hold** 25% of the capital or voting rights in another entity, please confirm it clicking below

No participation to add

Overview of ownership

Name	%	Type	Financial Data	Actions	S	P	O
GVERSION 572		MO	TO: 600,000.00 EUR BS: 50,000.00 EUR Employees: 15.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GG572 Holding	80.00 %	S	TO: 600,000.00 EUR BS: 400,000.00 EUR Employees: 15.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Minor Shareholders	20.00 %	M			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Back to URF **Save Draft** **Quit Wizard**

Also in this case, the question will indicate every time which is the minimum percentage of participation that you need to declare.

When you click on the button **Add Participation**, the blue pane will slide in and ask you to enter information concerning these participations. Once the information filled in, click on **Validate** to submit it.

In case there are no (or no more) relevant participations, click on the button **No Participation to add**.

Step 4: The System asks you about Other Relationships

The wizard will now ask you about “Other Relationships” of the current entity.

What information to provide next

Current Organisation: **GVERSION 572**

Enter information about:

Shareholders ✓ Participations ✓ Other Relationships

Potential relations between GVERSION 572 and other entities.
The EC Recommendation stipulates that other forms of relations might also need to be considered when assessing the SME status of an entity. Check [here](#) the other forms of relationship you must declare ⓘ

Choose one of the 2 options to proceed

If any of the above options applies to GVERSION 572 please click below

Add other relationship

If none of the above options applies to GVERSION 572 please click below

No other relationship to add

Overview of ownership

Name	%	Type	Financial Data	Actions	S	P	O
▼ GVERSION 572		MO	TO: 600,000.00 EUR BS: 50,000.00 EUR Employees: 15.00				
GG572 Holding	80.00 %	S	TO: 600,000.00 EUR BS: 400,000.00 EUR Employees: 15.00				
Minor Shareholders	20.00 %	M					

Back to URF Save Draft Quit Wizard

The question explains what kind of relationships has to be declared at this stage. You can click on the button **Add Other Relationship** and enter the information related to this entity or just declare that none of those relationships applies to, by clicking the button **No Relationship to ADD**.

STEP 5: The System moves to the following entity

Once you have answered all relevant questions for the main organisation (Shareholders-Participation-Other relationships), you will be asked to repeat the same exercise for all the entities you have indicated as belonging to its family tree.

In other words you will complete again STEP 2, 3 and 4 for each listed entity.

In our example, the system asks you about the shareholder (GG572) you added previously. This will become the "current entity"

What information to provide next

Current Organisation: **GG572 Holding**

Enter information about:

Shareholders

Please look at the list of possible shareholders below and select the appropriate option

- Public bodies
- Private entities holding 25% or more of Shares/Voting Rights
- Private persons ("natural persons") holding above 50% of Shares/Voting Rights

Choose one of the 2 options to proceed

If any of the listed entities hold shares or voting rights in **GG572 Holding**, please click below.

Add shareholder

If you want to declare that no entity of the listed types hold shares or voting rights in **GG572 Holding**, please click below

No shareholders to add

Overview of ownership

Name	%	Type	Financial Data	Actions	S	P	O
▼ GVERSION 572		MO	TO: 600,000.00 EUR BS: 50,000.00 EUR Employees: 15.00				
GG572 Holding	80.00 %	S	TO: 600,000.00 EUR BS: 400,000.00 EUR Employees: 15.00		-	-	-
Minor Shareholders	20.00 %	M					

Back to URF Save Draft Quit Wizard

Important: Where I am?

To identify which is the current relevant entity at any given point in time look at the top of the table, in the orange box. In the overview of the ownership table, You will see the current entity in a light orange background.

The Progress Bar




If you want to see how far are you from the result page, you can give a look at the progress bar (top right of the screen). The circles represent the entities already declared (a green circle for the completed ones, a grey bullet for the entities still to do)

Reviewing and editing the information provided

An Overview

At the bottom of the main wizard screen, you will find a table called "Overview of the Ownership" displaying the entities you indicated, the corresponding Financial Data, percentages, type of relationships and parent company they are related to. The last three columns (Shareholders, Participations and Other relationships) give you the information on what has been done up till now.


The icon  indicates that you still need to provide information.

The green checkmark icon , means that you successfully provided all the required information or that no other information is required.

Edit data for a company

Overview of ownership

Name	%	Type	Financial Data	Actions	S	P	O
▼ Sciant Associates Ltd.		MO	TO: 45,000.00 EUR BS: 20,000.00 EUR Employees: 124.00				
Sciant Associates Brazil	27.00 %	S	TO: 35,000.00 EUR BS: 9,450.00 EUR Employees: 230.00	 	-	-	-
Minor Shareholders	73.00 %	M					
Dorsett and Brickstone Co.	42.00 %	P	TO: 20,000.00 EUR BS: 8,400.00 EUR Employees: 53.00	 	-	-	-
Drakebound Systems Ltd.	100.00 %	O	TO: 5,000.00 EUR BS: 2,500.00 EUR Employees: 8.00	 	-	-	-

After creating an entity (you create it by validating the blue pane), you can edit the data at any time by clicking on the edit button .

The blue pane will slide in the wizard and you will be able to edit almost all the information provided (the legal name, the percentage, the financial data).





Important: The information related to the legal status of the entity is not editable using this procedure. Therefore, if you want for instance to change from Natural Person to Legal Person, you will have to delete this entity and create another one instead.

Edit the Ownership Structure: Shareholders


If you have already submitted information on the shareholder structure of a certain entity and you want to modify that structure, you can do the following:



- **Modify the % of a Shareholder:** select the edit button corresponding to the shareholder and modify its %. If you are going to enter a higher percentage, the


system will allow it just in case a Minor Shareholders item has been previously generated for that shareholders structure. Once entered the new percentage and validated, if the total % is less than 100%, you will have to answer once again that the current entity do not have other Shareholders by clicking the button

- **Delete a Shareholder** by clicking the button . In this case you will have to replace the percentage that remain uncovered by adding a new shareholder or clicking on the button  if the rest is held by minor shareholders.
- **Delete Minor Shareholders** by clicking the button . You might want to do this if the percentage of not relevant shareholders is now partially or totally held by a relevant shareholder. This case is similar to the previous one: you will have to replace the percentage that remains uncovered by adding a new shareholder or clicking on the button  if the rest is held by minor shareholders.

Edit the Ownership Structure: Participations and other Relationships

If you forgot to add a Participation or an Other relationship, you can do it at a later stage by clicking on the green checkmark , corresponding to the appropriate relationship (column P or O).

Important: This action is possible only if the corresponding icon is the green checkmark . If the icon corresponding to the relevant relationship is the icon , you will have to wait before adding the new relationship. The wizard will ask you to add it in due time.

To delete a Participation or an Other Relationship (or a Shareholder), you can do it by clicking on the delete icon  on the row corresponding to that entity.

Important: Every time you delete an entity, all the relationships created starting from that entity will also be deleted.

Ready for the Results

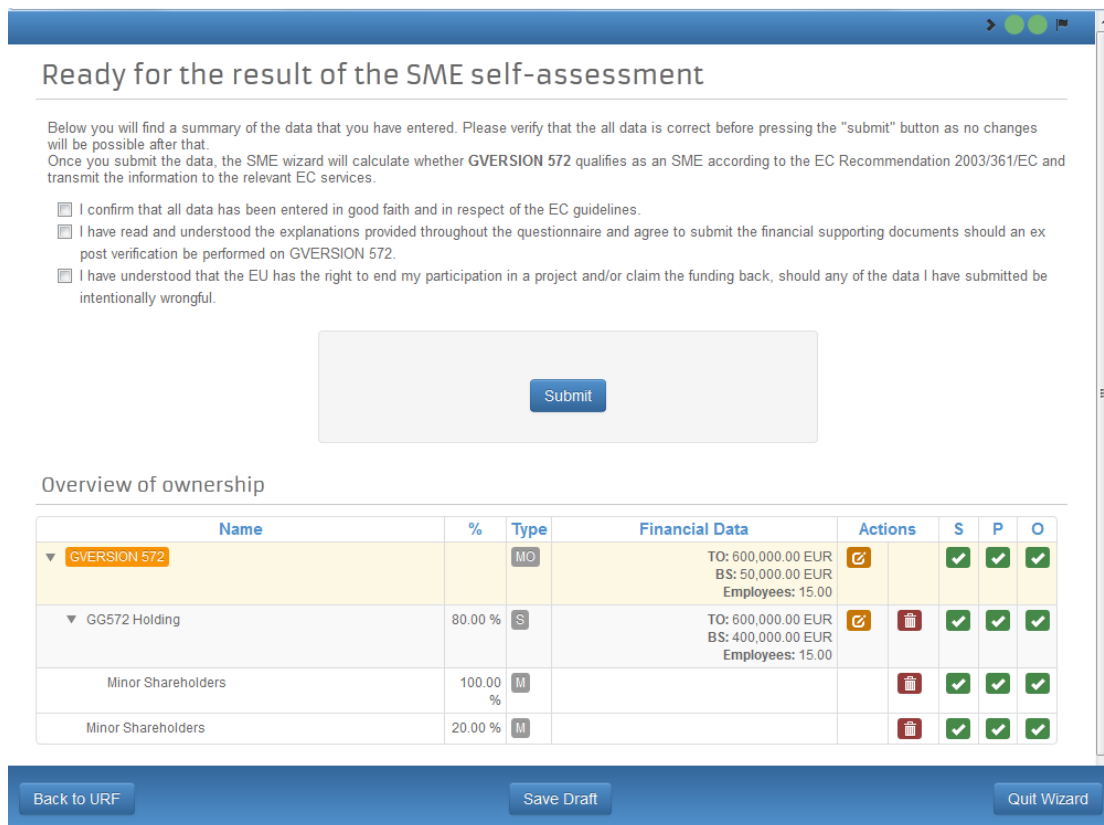
Once you've entered all the necessary information you will reach the “ready for the results” page.

Now is the time to check that all the information provided is correct. You can do so by reviewing it on the Overview of the Ownership table.

Once ready, click on .

Important: It can happen that you see this final page, even though some information concerning the created entities still has to be provided.


This means that the Wizard detected that some of the relevant thresholds have been exceeded during the calculation process, i.e. that your organisation does not qualify as SME.




















Ready for the result of the SME self-assessment




Below you will find a summary of the data that you have entered. Please verify that the all data is correct before pressing the “submit” button as no changes will be possible after that.
Once you submit the data, the SME wizard will calculate whether GVERSION 572 qualifies as an SME according to the EC Recommendation 2003/361/EC and transmit the information to the relevant EC services.

☐ I confirm that all data has been entered in good faith and in respect of the EC guidelines.
☐ I have read and understood the explanations provided throughout the questionnaire and agree to submit the financial supporting documents should an ex post verification be performed on GVERSION 572.
☐ I have understood that the EU has the right to end my participation in a project and/or claim the funding back, should any of the data I have submitted be intentionally wrongful.



Overview of ownership

Name	%	Type	Financial Data	Actions	S	P	O
▼ GVERSION 572		MO	TO: 600,000.00 EUR BS: 50,000.00 EUR Employees: 15.00				
▼ GG572 Holding	80.00 %	S	TO: 600,000.00 EUR BS: 400,000.00 EUR Employees: 15.00	 			
Minor Shareholders	100.00 %	M					
Minor Shareholders	20.00 %	M					

Important: If you have already a PIC and you are modifying your entity's data, please note that clicking on 'Submit' it is not enough to send the updates to the system. In order to make the changings effective, once back in the Enterprise data's tab, you will have to click on "**Update your data**" button.

Using Consolidated Accounts

Every time you are asked to enter financial data for a given entity, you have the option of using consolidated accounts.

The use of consolidated accounts allows the user to provide financial data for a group of companies at once.




After selecting this option, you have to indicate whether the selected company is preparing consolidated accounts for a group (is the parent company) or if its accounts are included in consolidated accounts prepared by another (parent) company.

When using consolidated accounts, just the parent company will have to provide financial (consolidated) data.

Important: The Main Organisation will always have to provide the individual financial data, even if using Consolidated accounts

It can happen that, at the end of the process, still some entities remain without parent company: a message will list these entities and the parent companies (if existing).

The user will be able to fix this by performing one of these actions:

- Select (by clicking on the edit button  of the overview of the ownership table) one of the parent companies and associate to it one or more of the listed entities);
- select (by clicking on the edit button  of the overview of the ownership table) one of these entities and associate it to a parent company;
- select (by clicking on the edit button  of the overview of the ownership table) one of these entities, and provide individual financial data (after deselecting the consolidated options).

No Economic Activity

If you declare that the Main Organisation does not have economic activity, it does not automatically disqualify it from being an SME. Indeed:

- In case of newly established companies, with no annual closed accounts, the user can provide financial data taken from its annual business plan.
- In case of long-time-to-market (the company has closed accounts but needs more time to enter the market), the user will enter, in addition to the latest closed accounts, the financial data taken from its multiannual business plan, indicating also the investments foreseen.

Things to know about the SME Self-Assessment Wizard

1. **GET PREPARED.** Prepare the latest financial accounts of all the relevant organisations and keep them at hand during the process of data entry in the SME Self-Assessment Wizard. As a recommendation, it is very helpful to prepare a diagram that shows the relationships between your organisation and the other relevant organisations in the ownership structure. You will typically be asked to enter the following financial data elements: **Total Annual Balance Sheet, Annual Turnover, Currency used, Staff Headcount** and **Date of Closure** of the financial period.
2. Always **STAY FOCUSED** on the current question and follow the corresponding instructions.
3. **WHAT AM I BEING ASKED?** When you answer the questions, always pay attention to the **Current Organisation** – this is the organisation that you are expected to enter data for (highlighted in orange on the screen).
4. **READ CAREFULLY** every time, the complete question text. Some questions might look familiar, yet the answer choices could be different.
5. **RELEVANT INFORMATION ONLY** - The wizard will not ask you and will not let you enter data which is not relevant to the self-assessment purposes.
6. **NO DUPLICATES** - Make sure you are not adding twice an organisation you have already added.
7. **OVERVIEW** - At any point during the process, you can review the already added organisations and their situation in the **Overview of ownership** table.
8. **FORGOT SOMETHING?** The Overview of ownership is also the place where you can re-edit or correct data already entered, using the buttons next to each organisation (edit, delete, etc.).
9. **READY TO SUBMIT?** The Wizard will prompt you to submit your data once it has finished collecting the required data for all the organisations provided. It is then time to check that all data is correct.

Where can I find the SME Self-Assessment Wizard?

The SME Self-Assessment Wizard is an integral part of the Beneficiary Register Service. It is available to **registered organisations** when they update their organisation data through the








option in the Participant Portal.

Registered Organisations: Organisation Data Updates







If your organisation is already registered, you can access the SME Self-Assessment Wizard from the **MY AREA > My Organisation(s)** page in the **Participant Portal**.

To do so, click the  icon for the respective organisation in the *My Registered Organisations* list to open the Beneficiary Register Data Update Panel.

My Registered Organisations

LEGEND  View Organisations  Modify Organisations  View Proposals  View Roles  View Projects

Show entries

NAME	PIC	VAT	STATUS	ACTIONS
gambadilegno	941945273		DECLARED	 
Nonsonounasme	941583657		DECLARED	 
Pippo e topolino	945172948		DECLARED	 

Showing 1 to 3 of 3 entries. ← PREVIOUS 1 NEXT →

Do you want to continue the registration of your organisation to receive a PIC?

In the Beneficiary Register Data Update Panel, the SME Self-Assessment option is accessible from the **SME** data group.

SME

Use this section to provide information about your SME Status. You can carry out the SME Self-Assessment (questionnaire) or provide the SME Self-Declaration (Yes/No). In some Horizon 2020 calls, like the SME instrument topics, the Self-Assessment is mandatory. For more information see the [SME page](#) of the Participant Portal and the [SME definition](#) page. SME Information is optional if you apply for the Education Programmes

SME Self-Assessment

In some Horizon 2020 calls (specified in the topic conditions and submission system) the SME Self-Assessment is mandatory and the lack of it may block your submission. Find additional information about the SME Self-Assessment on the [IT HOW TO wiki](#).

[Start SME self assessment](#)


SME Self-Declaration

If the SME Self-Assessment is not necessary in your case (e.g. for the Education, Audio-visual and Culture programmes), use the declaration below.

I declare my organisation as

☒ SME ☐ Non SME

as from

Click on the  button to start the Wizard.

Important: the SME Self assessment is no longer available during registration process. If you are registering a new organisation, at the end of the wizard, once obtained the PIC, you will be able to go directly to the Update page to perform the SME Self-Assessment.

Glossary

Adjacent market

An adjacent market is considered to be the market for a product or service situated directly upstream or downstream of the relevant market

Balance Sheet

A balance sheet or statement of financial position is a summary of the financial balances of a sole proprietorship, a business partnership, a corporation or other business organization. Assets, liabilities and ownership equity are listed as of a specific date, such as the end of its financial year.

Consolidated Accounts

The Consolidated Accounts (CA) are the combined financial statements of a parent company and its subsidiaries.

Economic Activity

A legal entity is considered to be engaged in an economic activity, if it's involved in any form of trade or activity carried out for remuneration or financial interest in a given market. In general, any activity consisting in offering goods or services on a given market is considered as an 'economic activity'.

The following activities are not considered as economic activities:

- (1) activities for which there is no financial offset;*
- (2) activities for which there is no given/direct market;*
- (3) activities for which the income generated is not distinct from the personal income of its members or shareholders.*

Headcount

The headcount is expressed in the number of annual work units (AWU), i.e. the number of persons who worked fulltime within a given enterprise (or on its behalf) during the entire year under consideration. The work of persons who have (i) not worked the full year (ii) worked part-time and (iii) the work of seasonal workers are counted as fractions of AWU. The duration of maternity or parental leaves is not counted.

The staff consists of:

- (a) employees;*
- (b) persons working for the enterprise being subordinated to it and deemed to be employees under national law;*
- (c) owner-managers;*
- (d) partners engaging in a regular activity in the enterprise and benefiting from financial advantages from the enterprise.*

Attention: Apprentices or students engaged in vocational training with an apprenticeship or vocational training contract are not included as staff.

Individual Accounts

Individual accounts are the financial statement of a company.

Investors

Investors can belong to one of the following categories:

- a. Public investment corporations, venture capital companies, individuals or group of individuals with a regular venture capital investment activity who invest equity capital in unquoted businesses ("business angels"). Please note that the total investment of business angels in one enterprise cannot exceed EUR 1,250,000;*
- b. Universities and non-profit research centres;*
- c. Institutional investors, including regional development funds;*
- d. Autonomous local authorities with an annual budget of less than EUR 10 million and less than 5000 inhabitants.*

Legal Entity

Legal entity is any entity created and recognised as 'legal person' under the law of its place of establishment (associations, foundations, companies, etc.). Legal persons have their own legal personality and may own property, enter into contracts, sue and be sued in their own name

Minor Shareholders

Shareholders who hold less than 25% of capital or voting rights in another enterprise.

Other Relationships

Other relationship means that one of the following situations describes the relation between two entities:

- the right to appoint or remove the majority of the members of the administrative, management or supervisory body,*
- the right to exercise a 'dominant influence', pursuant to a contract between enterprises or specific provisions in the memorandum or articles of association;*
- the 'majority' of the capital or voting rights pursuant to an agreement between shareholders or members.*

Parent Company (Consolidated Accounts)

A Parent-company' is the holding company of the group whose accounts are consolidated.

Participation

Participation in another entity means that you hold either shares or voting rights in another company. Vice Versa, if another natural or legal person participates in your entity, it means that it holds shares or voting rights.

Public Body

Public body is any entity established as such by national law or an international organisation (e.g.ministries, departments, local and public authorities, public agencies, public universities, etc.)

Shareholder

A shareholder can be a Legal or Natural person, owning shares, voting rights, quotes/money/property in another entity

Turnover

Total revenues generated from the sales of products and/or supply of services on a given market

Some final HINTS

SUBMITTING THE RESULTS

The "**save a draft**" button is not a way to submit your data to the system.

In order to do send the data to the you have to complete the SME Self-Assessment by answering to all the relevant questions until you will reach the "submit page". If you are updating your data's PIC, once back to the Enterprise data tab, you will click on **Update your data** in order to send the results to the system.

NO CLOSED ACCOUNTS

If your company is **newly established** and you don't have yet closed accounts, you have to proceed as follows:

- Start the SME Self-Assessment
- Declare Your company not having an economic activity
- Declare Your company being newly established company (no closed accounts yet)
- Declare Your company not having a long time to market
- Enter financial data, your **company's registration date** (in the financial closing date field) and the estimated figures taken from your **first year's business plan** (the turnover must be positive).
- Complete the SME self-assessment, indicating shareholders and participations.