

**ICMPD White Paper**

**Migrant Sensitive Local  
Entrepreneurship Ecosystem  
Analyses and Policy  
Recommendations for Türkiye**

**August 2022**







### About ICMPD Western Balkans and Türkiye Regional Office

The Regional Office for Western Balkans and Türkiye, as the centre of the activities of ICMPD in the region, works with all countries in the region on all aspects of migration, to contribute to better migration management in this strategically and operationally important geography. The Regional Office, through its main seat that will be located in Istanbul and through offices located in Ankara, Belgrade and Skopje coordinates the work of ICMPD in the region and implements projects on the ground.

The International Centre for Migration Policy Development is an inter-governmental organisation with UN Observer status, created in 1993 at the initiative of Switzerland and Austria. As inter-governmental organisation ICMPD has 19 member states and is supported in several ways by 30 European governments. ICMPD strives for comprehensive, sustainable and future-oriented migration governance and applies a three-pronged approach: capacity building, migration dialogues, and research.



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## Abbreviations

ICMPD	International Centre for Migration Policy Development
CSOs	Civil Society Organizations
İŞGEM	Business Development Center
KOSGEB	Small and Medium Enterprises Development Organization
LEE	Local Entrepreneurship Ecosystem
LHC	Local Host Communities
NGOs	Non-governmental Organizations
OECD	Organisation for Economic Co-operation and Development
PMM	Presidency of Migration Management
SuTPs	Syrians Under Temporary Protection
TEKMER	Technology Development Center
TTOs	Technology Transfer Offices
UN	United Nations



## Introduction

This study is carried out within the scope of Enhancement of Entrepreneurship Capacities for Sustainable Socio-Economic Integration (ENHANCER) Project, which is funded by the European Union and implemented by the International Centre for Migration Policy Development (ICMPD).

Migration sensitive Local Entrepreneurship Ecosystem (LEE) Analyses have been carried out in 11 provinces of Türkiye; Adana, Ankara, Bursa, Gaziantep, Hatay, İstanbul, İzmir, Kayseri, Konya, Mersin, and Şanlıurfa. The distinct feature of these analyses than the ones already conducted is the *inclusive approach* for Syrians under Temporary Protection (SuTP). Through ecosystem analyses, the challenges and opportunities for the SuTP entrepreneurs as well as of their relations with ecosystem actors have been identified and policy recommendations are presented for improvement of local entrepreneurship ecosystem focusing on SuTP entrepreneurs.

These analyses which were carried out in 11 provinces will have a crucial role in order to support policy framework for socio economic inclusion of SuTPs. The findings related to local entrepreneurship ecosystems will also serve for more customized intervention modalities in order to improve the existing systems. In this context, methodology of the study, global and national context, main findings and policy recommendations are presented in the below.





## Methodology of the Study

It is a well-known fact that many factors affect the success of a newly established enterprise. While the composition of these factors are called "**entrepreneurship ecosystem**", it consists of a series of interconnected institutions and facilitators to assist the entrepreneur in the new business development process (Isenberg, 2011)<sup>1</sup>.

A Silicon Valley study carried out by Evans (1995) summarises the components of an effective entrepreneurship ecosystem under six headings:

- i. venture capital,
- ii. support infrastructure,
- iii. universities and research institutions,
- iv. human capital,
- v. lead users,
- vi. entrepreneurial spirit.

The creation of supportive environmental conditions alone is insufficient for an ideal entrepreneurship ecosystem. In World Economic Forum Report (2014)<sup>2</sup> Foster and Matsushita suggests that there are eight pillars for an "ideal entrepreneurial ecosystem". These pillars are namely accessible markets, human capital, financing, training, support systems and mentors, universities as catalysts, culture and government/regulations. In another research (Spiegel, 2017), the characteristics of the entrepreneurial ecosystem are grouped under three main variables: cultural characteristics, social characteristics and material characteristics. Although there are differences in findings, latter researches support the fact that entrepreneurs achieve more enduring success when placed in a supportive environment.

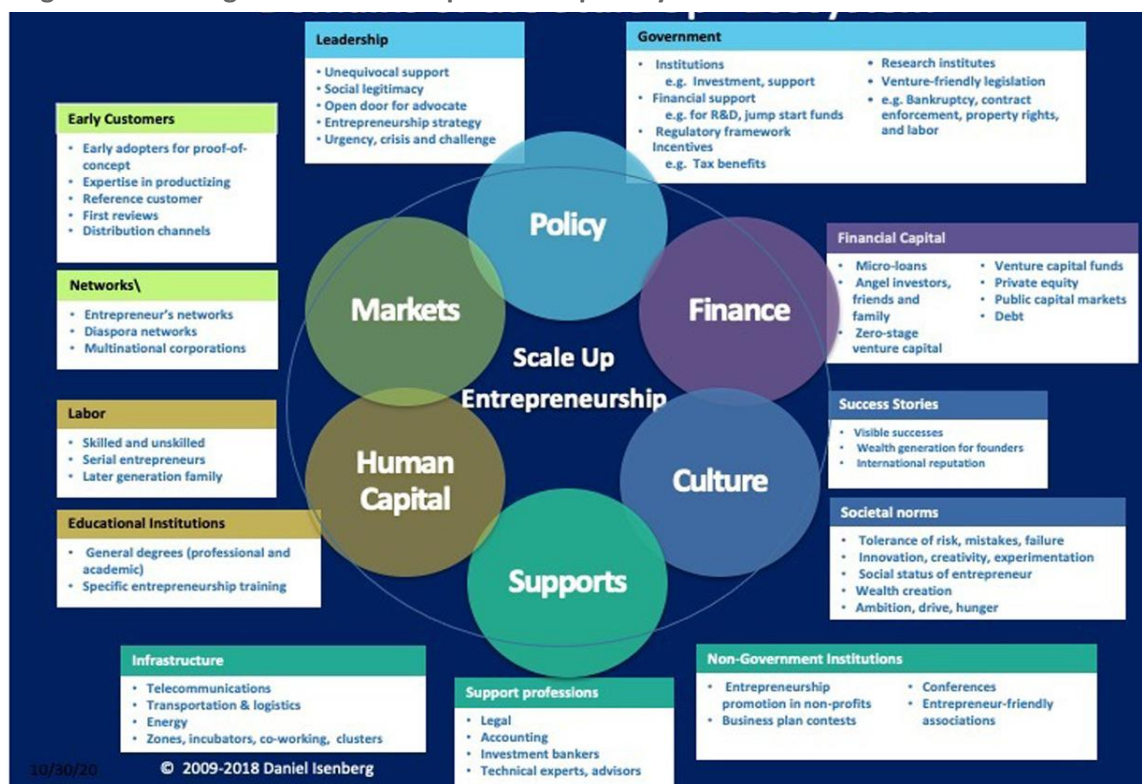
Migration sensitive local entrepreneurship ecosystem analyses are conducted according to the common ecosystem approaches in the literature. This study is based on one of the most used methodologies in the literature, Isenberg's model which consists of six different dimensions (Figure 1).

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<sup>1</sup> Isenberg, D. (2011). *When big companies fall, entrepreneurship rises*. Harvard Business Review. (Retrieved on March 2021 from <http://blogs.hbr.org/2013/03/when-big-companies-fall-entrep/>)

<sup>2</sup> Foster and Matsushita (2014) in *Entrepreneurial Ecosystems around the Globe and Early-Stage Company Growth Dynamics*. World Economic Forum. Geneva, Switzerland.

Figure 1- Isenberg's Model of Entrepreneurship Ecosystem<sup>3</sup>



Source: Byrdges & Pugh, 2021; from Isenberg, 2011

The migrant sensitive local ecosystem analyses are designed based on the Isenberg's ecosystem model and reported under four main headings;

- ✓ Legal Regulations and Infrastructure
- ✓ Access to finance and support mechanisms
- ✓ Human capital
- ✓ Media and awareness levels

This comprehensive study has been carried out in different stages and phases. The target groups of this study have been a broad range of local ecosystem actors. These actors may be listed as follows:

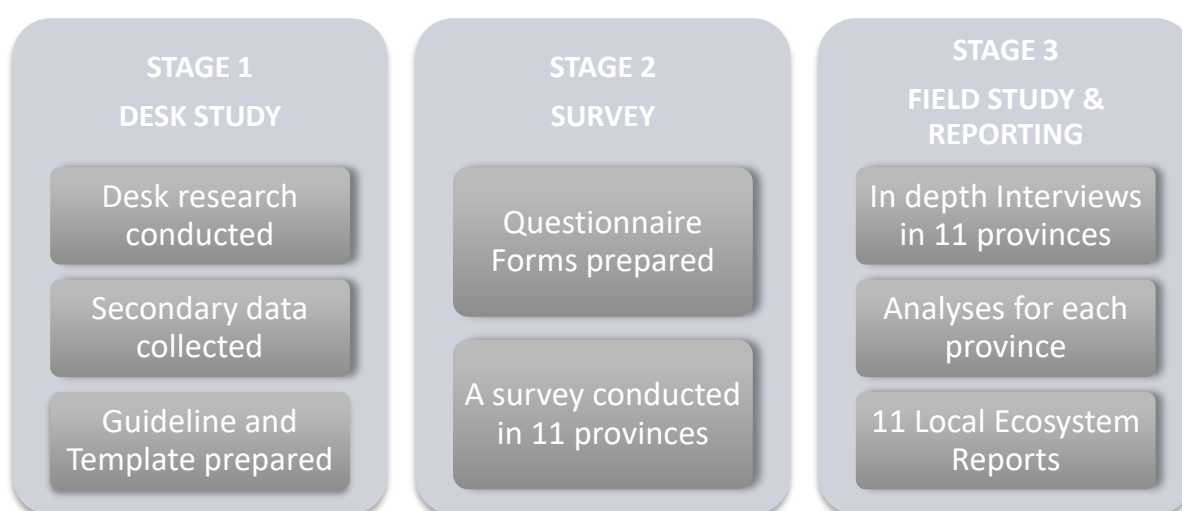
- Entrepreneurs (SuTPs and LHCs).
- Public Institutions,
- Public Professional Organisations,
- Non-Governmental Organisations,
- Universities,
- Technology Transfer Offices (TTOs),
- Technoparks,
- Investors,
- Municipalities,
- Financial Institutions

<sup>3</sup> Brydges, T., & Pugh, R. (2021). Coming into fashion: Expanding the entrepreneurial ecosystem concept to the creative industries through a Toronto case study. *The Canadian Geographer/Le Géographe canadien*, 65(3), 346-367.

At the first stage of the study a Guideline and a Template on LEE was prepared to guide researchers on each step. Then, primary and secondary data were analysed to identify the specific characteristics of target groups and ecosystems. After this process, lastly, the Questionnaire Forms were developed. As a second stage, a detailed survey study was conducted in 11 provinces with 1563 participants including women and potential entrepreneurs from SuTP and LCH communities. Among these participants 853 of them were SuTPs. This study served as a quantitative field study for the ecosystem analysis to be conducted in each province.

The last stage was for the field studies and reporting. In each 3 phase of this study, interviews were held with at least 20 local ecosystem actors per province. In Phase-1, the field studies for Ankara, İstanbul and İzmir provinces completed and reports were delivered. In Phase-2 field studies and reporting were completed in Adana, Bursa, Hatay, Kayseri, Konya and Mersin. Lastly, in Phase-3 field studies and reporting were completed in Gaziantep and Şanlıurfa.

**Table 1 Stages of LEE Analyses**



It is highlighted that SuTPs in Türkiye have invested approximately 334 million dollars in the Turkish economy since 2011 and they own more than 15 thousand businesses with an average of 10 employees (Kaptaner, 2020). Given all these details, promoting entrepreneurship for SuTPs keeps its importance as a key policy instrument. In general, although entrepreneurship is common amongst SuTPs, still there are some problems observed in terms of the growth and sustainability of these enterprises established by SuTPs. With the below presented findings of this study, it is aimed at revealing the current situation of entrepreneurship ecosystem in terms of inclusion of SuTP entrepreneurs and provide policy recommendations for possible improvement areas.

## 1. Understanding the Global and National Context for migration, resilience and entrepreneurship

### 1.1. General Overview on Migration, Resilience and Entrepreneurship

According to the *World Migration Report* (UN, 2022), the total number of international migrants is estimated to be almost 281 million, which makes 3.6% of the global population<sup>4</sup>. It is argued that after the Second World War, the biggest migration movement was experienced in the last 10 years as a mass migration flow from Syria to neighbouring countries, mostly to Türkiye.

Latest available figures of Presidency of Migration Management (PMM) shows that there are more than 4.9 million foreign nationals present in Turkish territory and most of them (3.747.734) are Syrians under temporary protection (SuTPs) as of March 2022<sup>5</sup>. This explicitly denotes that Türkiye hosts the largest population of forcibly displaced persons in the world.

A large influx of forced migrants may constitute a heavy financial burden on the economies of the host countries for provision of basic services including social housing, education, health and other expenditures for integration of refugees in the short run. However, it has been proven many times in history that immigrants are key players who make important contributions to the societies in accelerating economic development as a result of a good governance in socioeconomic integration processes. Therefore, it is of high importance to plan and implement policies that will increase self-sufficiency of immigrants and enhance their contribution to the host communities.

Studies on migrant integration indicate that the preliminary condition for integrating migrants into the society is that the migrants being able to gain a sustainable income. One of the alternatives that can be suggested to reach income is to provide immigrants with access to jobs and support their mobility as wagedworkers in the labour market. However, it has been shown that language-related disadvantages, lack of necessary skills and education, existence of few application opportunities and different legal restrictions make it difficult for immigrants to find a job and work on regular basis (Karadal et al., 2020)<sup>6</sup>.

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<sup>4</sup> UN, World Migration Report (2022). Retrieved from: <https://publications.iom.int/books/world-migration-report-2022> .

<sup>5</sup> Presidency of Migration Management of the Ministry of Interior, 03/03/2022.

<sup>6</sup> 2. Karadal, H., Shneikat, B.H.T., Abubakar, A.M. et al. (2020). Immigrant Entrepreneurship: the Case of Turkish Entrepreneurs in the United States. *Journal of the Knowledge Economy*, (SSCI).

The limited access of immigrants to the labour market negatively affects the integration processes of migrants and compels them to try alternatives such as self-employment (Cheung and Phillimore, 2014)<sup>7</sup>. In addition to these, it is stated that self-employment is seen as more attractive than fixed wage jobs due to the opportunity to act independently and the potential for higher earnings (Zuiker, 1998)<sup>8</sup>. Given these reasons, it is seen that more migrants engage in entrepreneurial activities (Vandor & Franke, 2016)<sup>9</sup>.

#### **Box 1- The resilience of refugees and host community members in Türkiye**

*“Further strengthening the resilience of refugees and asylum seekers (Syrian and non-Syrian), and of host communities in Türkiye, remains a priority. Initial assessments suggest that the Covid-19 pandemic has had significant implications on the livelihoods of migrants and refugees in Türkiye, and host communities alike, all of which are particularly vulnerable. It is likely that the burden on economic measures will be asymmetrically shared, with migrants being more strongly affected than host communities. Constraints on face-to-face CSO service provision will further affect refugee access to rights and services. Humanitarian and development partners active in Türkiye have adopted service delivery modalities to continue their efforts to support the affected population. The EU redirected €105 million to support the Covid-19 response in Türkiye, notably for the most vulnerable refugees.” (Kılıç T. and Bayram A., June 2021)<sup>10</sup>*

As stated in OECD Report, entrepreneurship is recognized as an effective tool to increase the integration and economic success of immigrants (OECD, 2019)<sup>11</sup>. The word "entrepreneur" refers to a person who desires and has the ability to turn a new idea or invention into a successful business. Kuratko and Morris (2018), define entrepreneur as a person who takes the initiative to collect

7 Cheung, S.Y. and Phillimore, J. (2014) ‘Refugees, Social Capital and Labour Market Integration in the UK’. *Sociology* 48(3): 518-536.

8 Zuiker, V. S. (1998). *Hispanic self-employment in the southwest: rising above the threshold of poverty*. Taylor & Francis.

<sup>9</sup> Vandor, P.; Franke, N. (2016). *Why Are Immigrants More Entrepreneurial?*. Harvard Business Review. Retrieved on March 2021 from: <https://hbr.org/2016/10/why-are-immigrants-more-entrepreneurial> (retrieved on March 2021)

<sup>10</sup> Kılıç T. and Bayram A. (June, 2021). *Revisiting EE-Turkey Cooperation on Migration: Roadmap for an Enhanced Partnership*. ICMPD. Ankara.

<sup>11</sup> OECD/European Union (2019). Indicators of immigrant integration: Introduction and overview” in *Settling in 2018: Indicators of Immigrant Integration*. OECD Publishing. Paris/European Union and Brussels. DOI: <https://doi.org/10.1787/9789264307216-5-en>

resources, manage an enterprise and undertake the risks during the process, and they especially emphasize the risk-taking tendency in entrepreneurial activities<sup>12</sup>.

Immigrants tend to be eligible candidates for entrepreneurship with their higher risk-taking tendencies, sense of responsibility, desire for success, and tendency to quickly seize opportunities (Kaptaner, 2020)<sup>13</sup>. As a supporting argument, it has been underlined that immigrants have a significantly higher tendency to start a new business compared to native people (Vandor and Franke, 2016).

According to data collected from 69 countries in 2012, while immigrants represent 27.5 percent of the country's entrepreneurs, they only make up 13 percent of the population (GEM, 2013)<sup>14</sup>. In another report written by Kosten (2018), it is stated that 28 percent of simple workplaces defined as high street businesses, including retail, accommodation, catering services and local services are owned by immigrant entrepreneurs. These findings prove how active immigrants are in entrepreneurship<sup>15</sup>.

Entrepreneurial activities carried out by immigrants play a very important role in facilitating their integration as well as reducing poverty. Thanks to their activities, migrant entrepreneurs not only provide sustainable income and shelter for themselves and their families, but also provide job opportunities for other newly arrived migrants and also host communities. In addition, migrant entrepreneurs who take up jobs that are often seen as undesirable by local people, contribute to recovery of recessionary regions.

## 1.2. Refugee Entrepreneurship: Towards a Labour Market Integration

Refugees often encounter problems in labour market integration. Entrepreneurship becomes a prominent mechanism to ensure a smooth labour market integration and social inclusion for refugees. In the Policy Brief On Refugee Entrepreneurship prepared by OECD (2019), different

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<sup>12</sup> Kuratko, D. F., & Morris, M. H. (2018). Examining the future trajectory of entrepreneurship. *Journal of Small Business Management*, 56(1), 11-23.

<sup>13</sup> Kaptaner, A.S. (2020). *Mültecilerin Entegrasyonu ve Ekonomik Etkileri Üzerine Yeniden Düşünme* (Rethinking Refugee Integration and Its Economic Impacts). Retrieved on March 2020 from: <https://businessdiplomacy.net/tr/multecilerin-entegrasyonu-ve-ekonomik-etkileri-uzerine-yeniden-dusunme/>

<sup>14</sup> GEM Global Report (2013) Global Entrepreneurship Monitor Report <https://www.gemconsortium.org/report/gem-2012-global-report> (Retrieved on March 2021)

<sup>15</sup> Kosten, D. (2018) Immigrants as Economic Contributors: Immigrant Entrepreneurs, <https://immigrationforum.org/article/immigrants-as-economic-contributors-immigrant-entrepreneurs/> (Retrieved on March 2021)



benefits of promoting and supporting entrepreneurship amongst refugees are underlined<sup>16</sup>. Firstly, supporting entrepreneurship ensures an alternative mechanism for refugees to route into work and generate income, which improves the quality of life. Secondly, entrepreneurship opportunities provide non-financial benefits for refugees such as self-empowerment, improved self-confidence, stronger and larger social and professional networks, and greater social capital. Thirdly, refugee entrepreneurs contribute to local development in countries of origin. They may tend to do this most apparently with creating jobs. In addition, with an enabling environment for refugees, a Refugee led business brings about a wider socialisation with LHC (Lyon, Sepulveda and Syrett, 2007).

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<sup>16</sup> OECD (2019). *Policy Brief On Refugee Entrepreneurship*. OECD SME and Entrepreneurship Papers No. 14 Retrieved from <https://doi.org/10.1787/f493861e-en>

## 2. Findings of Migrant Sensitive Local Entrepreneurship Ecosystem Analyses

As briefly mentioned in the methodology section field study of the LEE Analysis Reports was carried out in two stages. While the survey method was used in the first stage of the field research, face-to-face interviews were conducted with SuTP and LHC entrepreneurs and with local actors operating in the entrepreneurship ecosystem through in-depth interview technique in the second stage. As a result, data collected have been categorised and presented under four main headings in this chapter<sup>17</sup>.

### 2.1. Legal Regulations and Infrastructure

The field research carried out on the legal regulations and infrastructure highlights that it is very cumbersome to understand the legislation **for both LHC and SuTP** entrepreneurs. In general, establishment procedures of enterprises take time and bureaucratic processes create difficulties for entrepreneurs from both groups. In particular, SuTP population has more difficulties in this regard due to the necessity of learning the legislation of a different country and the language barrier.

When SuTPs would like to start a new business, they are mostly accompanied by a Turkish or Syrian **intermediary** to facilitate their transactions. Research findings shows that there are different types of trainings organized by entrepreneurship actors to support SuTP entrepreneurs in this regard, but these trainings do not reach as many people as targeted.

Another important detail that stands out is the **lack of motivation** for SuTP entrepreneurs to work, and to be registered to comply with the related legislation. In particular, the reluctance of companies that makes contract manufacturing and produce goods on behalf of another manufacturer instead of the consumer is much more prominent. It seems inevitable that entrepreneurs who want to run their business with SuTP employees tend to go unregistered because they do not have the chance to recruit as many SuTPs as they require even if a work permit is obtained (due to the quota). According to Turkish employment regulations, the number of foreigners under temporary protection cannot

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<sup>17</sup> ICMPD underlines the fact that findings inside this paper only reflects the results of interviews and questionnaires conducted with the sample SuTP and LHC population.





exceed 10% of the Turkish citizens employed in the workplace and maximum one foreigner under temporary protection may be allowed to work in workplaces with less than ten employees<sup>18</sup>.

All registered and unregistered entrepreneurs state that they cannot access the necessary **information regarding legal regulations**. While the majority of registered entrepreneurs argue for the language barrier in this regard, there are also those who state that their accountants maintain relations with the institutions for legal proceedings and that they do not have any knowledge about the subject. What applies to all registered and licensed businesses is that accountants carry out legal proceedings and SUTPs have no contact with institutions. Since accountants' function in the entrepreneurship ecosystem are extremely limited, it is observed that they need additional consultancy services such as access to alternative finance mechanism, grants of national and international institutions and benefitting government supports for integration to the ecosystem.

An important finding at this point implies that SuTP entrepreneurs, especially whose customers or partners are LHC and who sell final products are more tend to work registered. On the other hand, businesses that make contract manufacturing on behalf of a company and sell goods to SuTP do not feel obliged to legal regulations. In the interviews made on this subject, the entrepreneurs claimed that they could not work formally due to the high costs. However, this situation interpreted as unfair competition within in the registered Turkish and also SuTP business community.

In the background of their insistence on unregistered work, there is a desire to keep costs low, as well as prejudices against legal processes. Unregistered working tradition of especially small firms and the negative experiences of entrepreneurs with government institutions in Syria canalize SuTP entrepreneurs to work unregistered. It is possible to say that enterprises that reach a certain scale size have a reduced chance of unregistered work. In addition, export oriented entrepreneurs have no significant problems with registered working due to effective regulatory framework. However, in the regions where mostly small enterprises and contract workers by making labour-intensive production are dominant, enterprises desire to work unregistered.

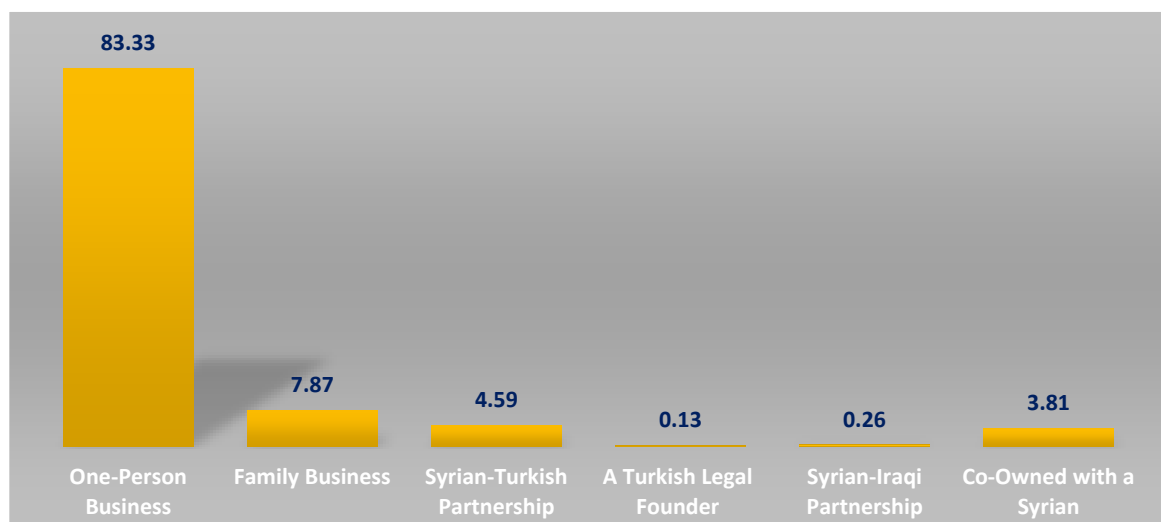
Finally, it should be noted that the partnership structures of SuTP entrepreneurs are generally in the form of a one-person business or a family business (Figure 2). Micro enterprises and family firms

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<sup>18</sup> <https://www.mevzuat.gov.tr/mevzuatmetin/3.5.20168375.pdf>

mostly prefer verbal contracts and make unregistered transactions which reduce their requirements for legal regulations and decrease their intention to work registered.

**Figure 2-Ownership Structure of SuTP Businesses**



Source: ICMPD Entrepreneurship survey results

## 2.2. Access to Finance and Support Mechanisms

It has been observed that the outstanding differences between the two groups of entrepreneurs, i.e. LHC and SuTP entrepreneurs, with respect to the integration into the entrepreneurship ecosystem are mostly dominant in access to financing resources and support mechanisms. The results of the analyses show that SuTP entrepreneurs' access to financial resources are quite limited compared to LHC entrepreneurs. Although the contribution of temporary protection to this result is an expected factor, the fact that SuTP entrepreneurs do not have sufficient information on different financing sources increases these constraints.

According to the survey results, SuTP entrepreneurs start their businesses with their own capital or borrowing from family and friends. It has been observed that the number of SuTP entrepreneurs benefiting from the loan providing facilities of banks or the grant support of public and international institutions is quite low. One important reason for this situation is unregistered work. It should peculiarly be underlined that companies that do not have the necessary accounting records in order to obtain financing from banks are excluded from the financial system.

Furthermore, SuTP entrepreneurs do not have sufficient knowledge and experience about access to finance and supports. Despite different establishment stories, the entrepreneurs interviewed stated



in common that they had no institutional connection or experience in grant schemes or support mechanisms. There were specific questions focused on all institutions that provide information and funds for entrepreneurs such as Development Agencies, KOSGEB, Public Professional Organisations, Universities, Technoparks, International Organisations, Non-Governmental Organisations, Venture Capitals, Angel Investors, Banks, Cooperatives, and common use facilities. Answers to the questions on such institutions were limited and unsatisfactory. One of the reason of this situation is their disbelief and prejudice about the financial support mechanisms. In other words, most of the SuTP entrepreneurs do not believe that they will able to get grants or financial support from the existing ecosystem institutions due to strict rules and procedures.

Therefore, SuTP entrepreneurs have to save money for a long time to establish their own businesses. Although SuTPs have necessary professional experience, the time to realise their entrepreneurial ideas is prolonged in this way and they miss many opportunities. In an environment where institutions in the entrepreneurship ecosystem can offer opportunities in terms of access to finance and support, the lack of information and prejudice about these institutions cause a significant amount of potential business losses.

As a comparative analysis, it has been determined that the enterprises that are registered, export and have a certain capital accumulation are not willing to benefit from a fund or grant call in the institutional sense. On the other hand, it has been determined that the capital accumulation is insufficient and the newly established businesses – many of which operate unregistered– show more interest in funding opportunities or calls for grants. The main problem in this type of businesses is that they insist on working unregistered.

Another conclusion obtained from the interviews is that SuTPs are far from the entrepreneurial ecosystem that is formed within the framework of high technology oriented universities and interface organisations. SuTP entrepreneurs mostly focus on traditional sectors and low technology products due to their educational background and abilities. Therefore, the technology gap between SuTP entrepreneurs and institutions such as techno parks put high-pressure on the SuTP inclusion in such institutions. Although there are some good examples, most of the entrepreneurship support institutions focusing on high technology-based and innovative initiatives with scarce resources do not show the necessary interest to include SuTP entrepreneurs. By the same token, SuTP entrepreneurs do not show sufficient interest in grants and support mechanisms and do not put additional efforts in this regard. The absence of role models to motivate them also prevents the process from developing in favour of SuTPs. In this regard, publicising successful SuTP entrepreneurs

who start or grew their firms by accessing finance and support mechanism is seem to be crucial to encourage SuTP entrepreneurs to search and apply to existing supports.

Lastly, support mechanisms for SUTPs are fragmentary and not sustainable. Most of the ecosystem institutions implement support programmes through externally funded projects and they are effective as long as the grant or funding continues.

In general, it has been determined that SuTP entrepreneurs' access to financial resources such as bank loans, grants and other alternative finance mechanisms are quite limited. This situation leads them to prefer to borrow from their friends, family and acquaintances in order to solve their financing problems, which constitutes a significant obstacle on their business development and growth.

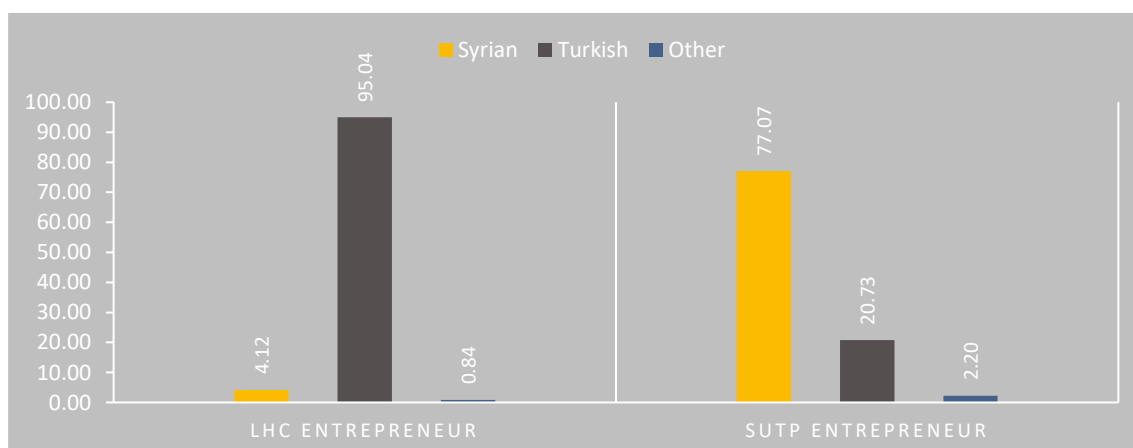
### 2.3. Access to Markets

Survey results and in-depth interview findings demonstrate that SuTP entrepreneurs have two main problems with market entry:

- Firstly, the range of products is limited due to capital constraints,
- Secondly, there are significant deficiencies in the marketing of the products due to the language barrier.

The customer distributions in Figure 3 show that, while sales generally match with the origins of the entrepreneurs, SuTP entrepreneurs also sell to Turkish customers at a considerable rate (21 percent). The fact that the local people are naturally dense in the Turkish market can be considered as the main reason for this situation.

**Figure 3- Distribution of sales by customer nationality (average percent, year 2020)**

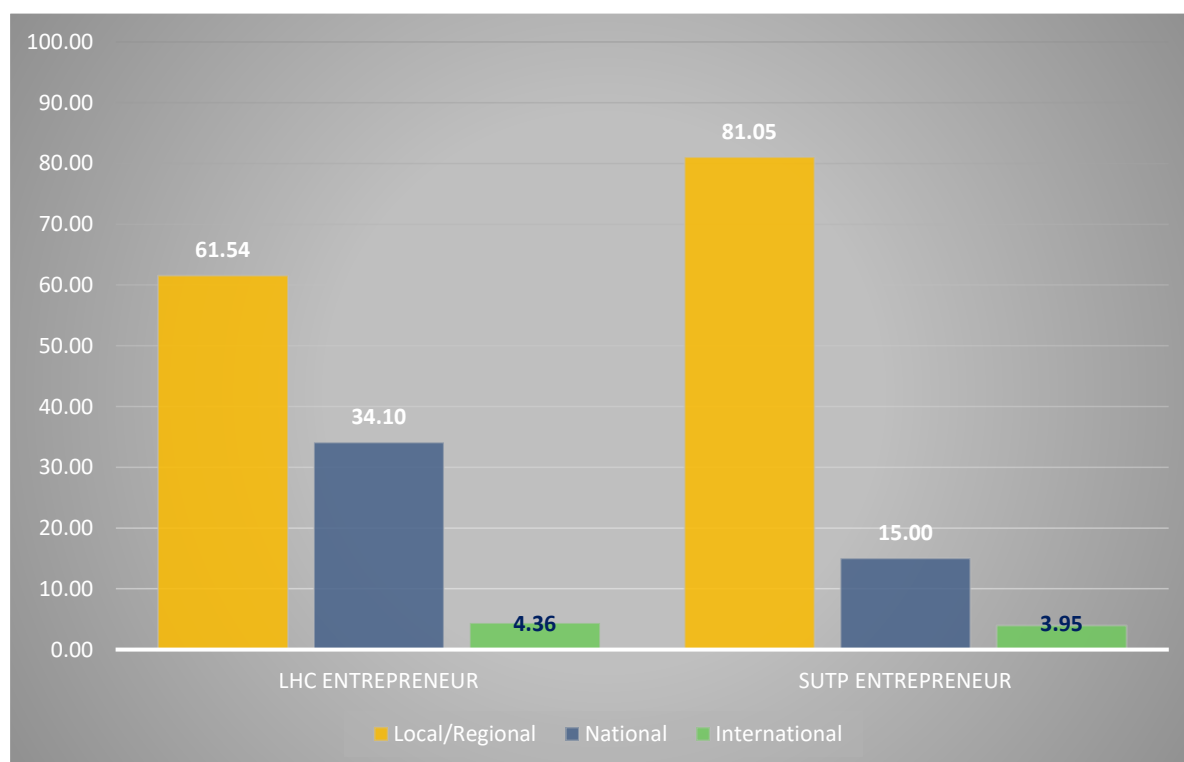


Source: ICMPD Entrepreneurship Survey results

The fact that SuTPs are not homogeneously distributed in all local markets, and that they establish their initiatives mostly in the regions where SuTPs live, may have contributed to the emergence of this picture. On the other hand, in the in-depth interviews many SuTP entrepreneurs declared that inclusion of a LHC partner could make a significant contribution to marketing, so they plan to have partnerships on this issue.

Figure 4 presents the market diversity for LHC and SuTP entrepreneurs. Considering the figures, Turkish originated entrepreneurs are more active in local and national markets, while Syrian originated entrepreneurs sell more to local/regional markets (81 percent). The finding shows that there may be a relationship between the concentration of Syrian entrepreneurs in trade and service sectors. As a matter of fact, companies in the trade and service sectors mostly supply their products to local/regional markets. This may make it difficult for SuTP entrepreneurs to enter national or international markets.

**Figure 4- Distribution of sales by market (average percent, year 2020)**



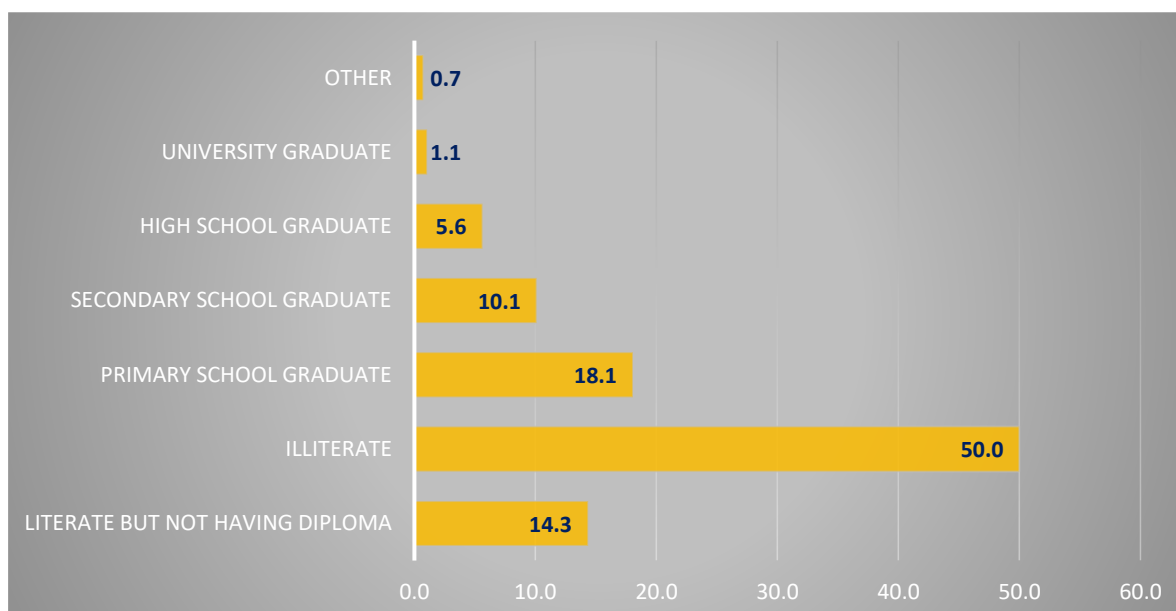
Source: ICMPD Entrepreneurship Survey results

## 2.4. Human Capital

Human capital is one of the fundamental elements that strongly effect entrepreneurial activities. As part of the analyses, the education level of participants was taken into consideration in relation to

human capital. The most important problem of SuTP population stands out as the low level of education.

**Figure 5- Education Levels for SuTP population (percent)**



Source: Presidency of Migration Management, 2019

Regarding the professional experience of SuTPs, it is observed that some of the SuTP entrepreneurs learned their profession in the province they are residing and started a business. Their motivation to become entrepreneurs mostly based on the fact that they cannot find decent jobs according to their qualifications. The low paying and unsecure jobs lead SuTPs to start their own businesses. However, a significant amount of SuTP entrepreneurs stated that they were also doing their current job in Syria as well.

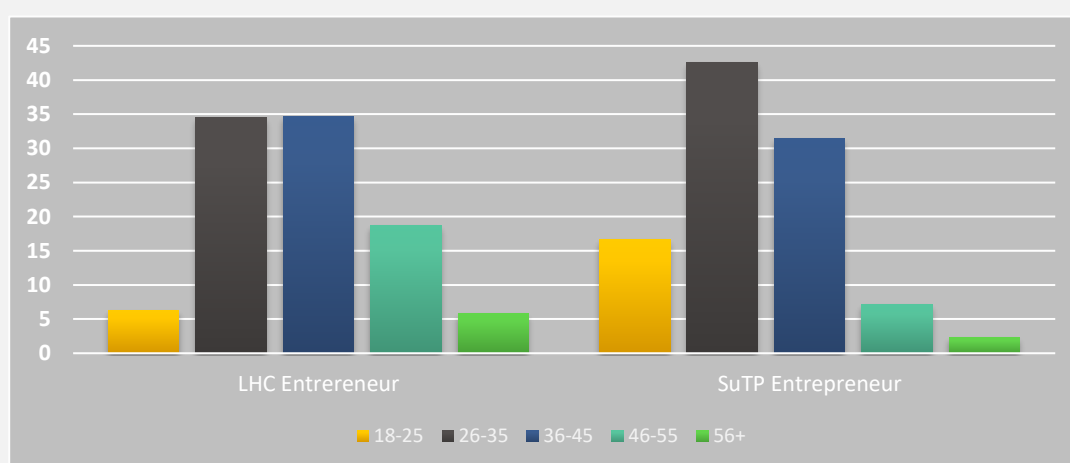
Focusing on the interaction of human capital in the ecosystem, while more than half of SuTP entrepreneurs employ workers, a small part of them employ the LHC members and the rest works with their own family and relatives. Majority of entrepreneurs complain about the lack of qualified workers and stress the importance of vocational training education and on the job training programs.

Finally, it has been determined that ecosystem stakeholders have difficulties in ensuring the inclusion of **migrant women entrepreneurs**. There are difficulties in the field in identifying women entrepreneurs and including the identified ones in the programs. In the case of SuTPs, female entrepreneurship stays at a much lower rate. Socio-cultural reasons are effective in women's inclination to entrepreneurship and their will of integration to labour markets.

## Box 2- Quick Insight on Demographical Characteristics and Sectors for SuTPs and LHC Entrepreneurs involved in the Study

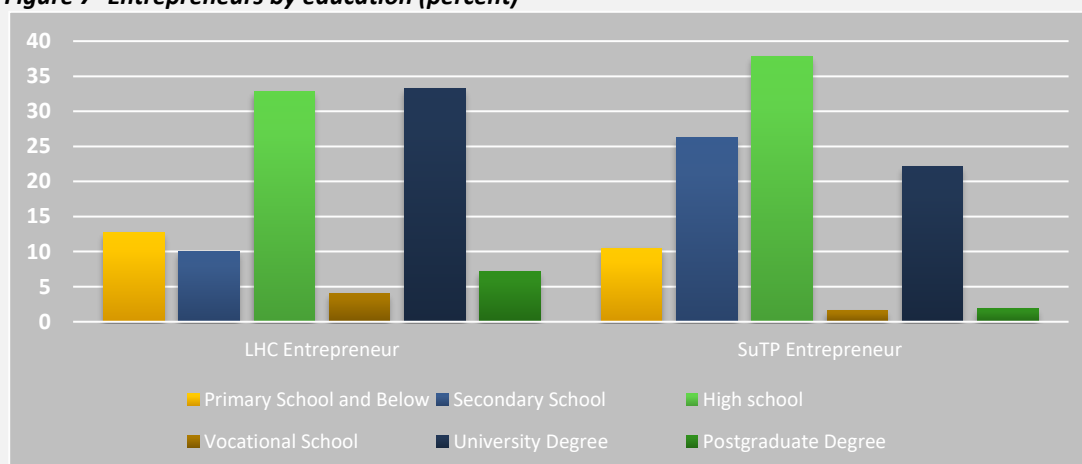
It is observed that SuTP entrepreneurs are younger than LHC entrepreneurs. While the share of LHC entrepreneurs younger than 35 years old is about 40 percent in the sample, this rate is about 60 percent among SuTP entrepreneurs. The average ages for LHC and SuTP entrepreneurs are 38.83 and 34.23, respectively.

**Figure 6- Age distribution of entrepreneurs (percent)**



Source: ICMPD Entrepreneurship Survey results

**Figure 7- Entrepreneurs by education (percent)**



Source: ICMPD Entrepreneurship Survey results

40.38 percent of LHC entrepreneurs have a university or higher education level. This rate is 24.01 percent for SuTP entrepreneurs. The difference between education levels is even more pronounced for women. While 70 percent of SuTP women entrepreneurs have a high school degree education and below, 44 percent of LHC women entrepreneurs have a high school degree education or below.

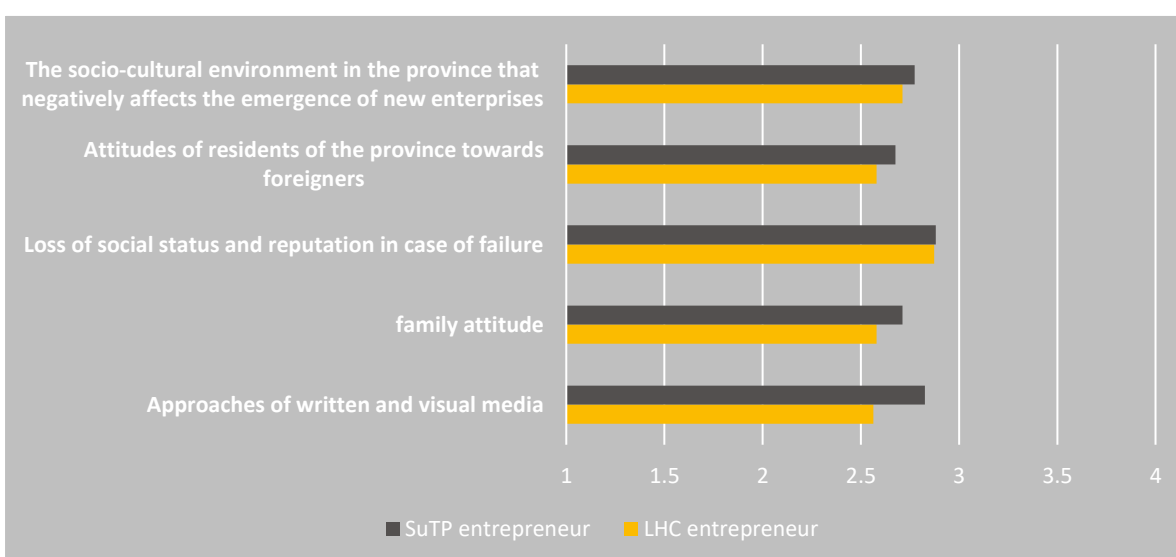
## 2.5. Media and Awareness Levels

In general, the level of coverage of SuTPs in the media is quite low which have positive and negative implications on SuTPs. Due to the low level of representation in the media, their problems, expectations, life conditions are not known enough by the society and they do not have the opportunity to express themselves. On the other hand, not drawing the attention of the society to the SuTPs prevents conflicts that may occur between the SuTPs and the LHC members.

SuTPs states that they are not affected by the negative news published from time to time on different media channels. A remarkable statement on this subject is: “Negative news in the media affects our lives, but they do not have a significant negative impact on our business. We have many Turkish friends; we do not have any problems with them”. It has been observed that this view is widely shared by other entrepreneurs as well.

Some SuTP entrepreneurs state that they are not equally competing with LHC entrepreneurs due to cultural and language barriers. The statement of an entrepreneur operating in the textile sector is noteworthy. He says: “Actually, we do not have a problem with the society in general and we do not have a problem with Turkish businesses with whom we have commercial relations. However, I see that they do not prefer us when we offer the same price when competing with Turkish businesses even though we offer the same quality”.

**Figure 8- Cultural and social barriers faced while establishing businesses**



**Source:** Source: ICMPD Entrepreneurship Survey results

**Note:** (1-Supporting, 2-Not being an obstacle, 3- A small obstacle, 4-A big obstacle; average)





The survey results are in line with the in depth interview findings that SuTP entrepreneurs face more cultural and social barriers than the LHC entrepreneurs in all categories while starting a business. The biggest difference is found in the category of “Approaches of written and visual media”. The findings of in-depth interviews state that biased news against the migrants discourages SuTPs to start a business and makes it more difficult to get into interaction with LHC entrepreneurs in the ecosystem. However, it is important to note that entrepreneurs do not see cultural and social barriers as important as other factors such as access to finance or legal procedures.

## 2.6. SWOT Analysis for Entrepreneurship Ecosystem for SuTPs in Türkiye

Analysing the difficulties faced by SuTP entrepreneurs, the advantages, opportunities and possible threats they have is of paramount importance to identify the specific policies to be implemented for upgrading the entrepreneurship ecosystem. The SWOT (strengths, weaknesses, opportunities, and threats) analysis carried out within the framework of migration sensitive LEE analysis described in this paper and its findings are presented below:

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>▪ Previous entrepreneurship experience SUTPs</li> <li>▪ Awareness on the losses that may arise due to unregistered work and deficiencies in legal processes,</li> <li>▪ Presence of successful entrepreneurs who have established businesses by benefiting from the vocational training courses</li> <li>▪ Existence of young entrepreneurs tending to establish initiatives and to follow opportunities,</li> <li>▪ Efforts to strengthen structures such as individual participation capital, Credit Guarantee Fund-KGF</li> <li>▪ Proximity to European and Asian markets and strong transportation network, Diaspora relations can be referred</li> <li>▪ Availability of physical infrastructure for entrepreneurs in the form of common use facilities such as İŞGEM/TEKMER, and Organised Industrial Zones etc.</li> <li>▪ Strong trust in businesses established through partnership between SuTPs and LHC members</li> <li>▪ Arabic language skills</li> </ul>	<ul style="list-style-type: none"> <li>▪ SuTPs' prejudices related to registered work</li> <li>▪ Willingness to avoid the costs of legal processes,</li> <li>▪ Application of quota for SuTP employees to paving way for unregistered employment,</li> <li>▪ Insufficient infrastructure to access accurate information on legal processes,</li> <li>▪ Maintaining relations with ecosystem actors only through financial advisors,</li> <li>▪ Having low sensitivity to changes in legal regulations,</li> <li>▪ SuTP initiatives' being active mostly in sectors with relatively low added-value,</li> <li>▪ Weak access to financing mechanisms due to unregistered work,</li> <li>▪ Problems in finding skilled labour and qualified managers,</li> <li>▪ The lack of a partnership culture,</li> <li>▪ Low level of education for innovation,</li> <li>▪ Lack of role models</li> <li>▪ Negative views of LHC members on immigrants,</li> <li>▪ Travel restrictions and difficulties in obtaining a work permit,</li> <li>▪ Lack of capacity to apply for grant scheme programmes or any other funding opportunities</li> <li>▪ The lack of comprehensive branding exercises,</li> <li>▪ The inadequacy of inclusive common use facilities for migrant entrepreneurs,</li> <li>▪ Women's refraining from entrepreneurship for social and cultural reasons,</li> <li>▪ Lack of knowledge and experience on funding institutions</li> <li>▪ Underdeveloped alternative finance mechanisms.</li> </ul>



### Opportunities

- Existence of a large domestic market with different opportunities in different sectors,
- Entrepreneurship's being on the agenda of many institutions,
- Training programmes on entrepreneurship,
- Availability of opportunities to access especially the Middle East and African markets with language advantage,
- The existence of supports provided by state and International Donors through international organisations for registered employees or businesses,
- Existence of local common use facilities that can reduce costs
- Existence of support mechanisms directly targeting women entrepreneurs.

### Threats

- Economic vulnerabilities caused by the Covid-19 pandemic conditions,
- Global and regional political and economic uncertainties,
- Increase in prices of raw materials and inputs,
- Uncertainties about the future of the SuTP population,
- Difficulties in obtaining skilled labour,
- Weak partnership culture,
- High investment costs,
- High loan rates,
- Difficulty in following the frequent legislative changes,
- High tax rates and complexity of tax regulations.
- Current conditions of Türkiye, high inflation, high energy prices and very high prices of raw materials



### 3. Conclusion and Policy Recommendations

Governments give priority to the development of entrepreneurship as an alternative socio-economic integration mechanism. With the policies developed in this context, many alternative policies such as reducing barriers in bureaucracy, creating micro-credits and seed capital supports, facilitating access to information about starting a business, informing about market access, introducing role models and presenting them to the society, providing networking services, and providing technology infrastructure are being put into practice.

At this point, below issues emerge as policy areas prioritised by developed and developing countries.

- Development of an entrepreneur-friendly regulatory framework,
- Developing and implementing a sustainable support system in thematic and general areas such as Women's Entrepreneurship, Youth Entrepreneurship, Eco-Entrepreneurship, Social Entrepreneurship and Global Entrepreneurship and Immigrant Entrepreneurship,
- Supporting Innovative Entrepreneurship,
- Development of Entrepreneurship Culture,
- Expanding entrepreneurship education at formal and non-formal education levels and developing a consultancy system for entrepreneurs,
- Facilitating entrepreneurs' access to finance

In order to realise these priorities and to create a migrant inclusive entrepreneurship ecosystem, priority needs have been identified in 11 provinces of Türkiye within the scope of the ENHANCER Project. Accordingly, policy recommendations in the light of findings presented in the last section of this paper.

## Policy Recommendations Matrix

Recommendation	Possible Collaboration Actors	Timeframe
<b>Legal Regulations and Infrastructure</b>		
Simplification of the legislations and regulations, which are related with SuTP and LHC entrepreneurs such as taxation, employment, finance, social security and government supports.	<ul style="list-style-type: none"> <li>▪ National level policy-makers</li> <li>▪ Regulatory institutions</li> </ul>	Mid-Term
Establishment of consultancy mechanisms for SuTP entrepreneurs in terms of legislation within the organisations which entrepreneurs mostly contact.	<ul style="list-style-type: none"> <li>▪ Chambers of Industry</li> <li>▪ Chambers of Commerce</li> <li>▪ Other public professional organisations</li> </ul>	Short-Term
Organising training courses and distributing informative brochures/documents to SuTP entrepreneurs about legal processes and regulations issued for entrepreneurs.	<ul style="list-style-type: none"> <li>▪ Public Professional Organisations</li> <li>▪ Municipalities</li> <li>▪ NGOs and international organisations</li> <li>▪ Public institutions</li> </ul>	Short-Term
Establishing institutional infrastructure and interfaces that facilitate access of SuTP entrepreneurs to accelerator and incubation centres, legal services, consultancy and mentoring services, employing experienced and Arabic-speaking personnel to eliminate the language barrier in the application processes of SuTPs to these services.	<ul style="list-style-type: none"> <li>▪ Municipalities</li> <li>▪ Technoparks</li> <li>▪ Organized industrial zones</li> <li>▪ Entrepreneurship centres</li> </ul>	Mid-Term
Providing mentorship/consultancy support especially to the early stage entrepreneurs on corporate and legal processes.	<ul style="list-style-type: none"> <li>▪ Technoparks</li> <li>▪ Entrepreneurship centres</li> <li>▪ Incubation centres</li> </ul>	Short-Term
Adding legal processes and legislation issues to the entrepreneurship trainings curricula for SuTPs,	<ul style="list-style-type: none"> <li>▪ NGOs and international organisations</li> <li>▪ Public Professional Organisations</li> <li>▪ Municipalities</li> <li>▪ Public institutions</li> </ul>	Short-Term



Organising programmes that will share the best practices and increase the awareness levels of entrepreneurs on registered work and on how to comply with the regulations.	<ul style="list-style-type: none"> <li>Local institutions</li> <li>International Donor Funded initiatives</li> </ul>	Mid-Term
Informing entrepreneurs on issues such as international product standards and inspection mechanisms.	<ul style="list-style-type: none"> <li>Local institutions</li> <li>National level institutions</li> <li>Civil Society Organisations (CSOs)</li> <li>International Donor Funded initiatives</li> <li>Public Professional Organisations</li> </ul>	Mid-Term
Informing SuTP entrepreneurs with different mechanism on legal processes and regulations, and preparing a database for the creation of an inventory of SuTP entrepreneurs.	<ul style="list-style-type: none"> <li>Chambers of Industry</li> <li>Chambers of Commerce</li> <li>Other public professional organisations</li> </ul>	Mid-Term
<b>Access to Finance and Support Mechanisms</b>		
Providing information with different communicative channels on the existing support programmes and on entrepreneurship training courses,	<ul style="list-style-type: none"> <li>NGOs and International Organizations</li> <li>Chambers of Commerce and Industry</li> <li>Public Institutions</li> <li>Entrepreneurship Centres</li> </ul>	Short-Term
Establishing common working areas where SuTP entrepreneurs can participate and develop their business ideas	<ul style="list-style-type: none"> <li>Universities,</li> <li>Municipalities</li> <li>Chambers of Commerce and Industry</li> <li>Organized Industrial Zones</li> </ul>	Mid-Term
Creating a web portal that will serve in Arabic to provide different kinds of services to SuTP entrepreneurs	<ul style="list-style-type: none"> <li>Public Institutions</li> <li>NGOs and International Organizations</li> <li>Entrepreneurship Centres</li> </ul>	Mid-Term
Supporting access of SuTP entrepreneurs to alternative funding sources (such as angel investor networks, crowdfunding, early-stage technology acceleration	<ul style="list-style-type: none"> <li>Public Institutions</li> <li>NGOs and International Organizations</li> <li>Entrepreneurship Centres</li> </ul>	Mid-Term



funds, domestic or foreign seed and series-A investors, grants, foreign direct investments, late-stage investors and venture capital),		
Providing prototyping and design support for LHC and SuTP entrepreneurs.	<ul style="list-style-type: none"> <li>▪ Technoparks</li> <li>▪ Entrepreneurship centres</li> <li>▪ Organized Industrial Zones</li> </ul>	Mid-Term
Supporting common use facilities, where SuTP entrepreneurs can reduce their costs and develop cooperation with other ecosystem actors.	<ul style="list-style-type: none"> <li>▪ Public Institutions</li> <li>▪ International Organizations</li> </ul>	Mid-Term
Encouraging programmes that will facilitate women's participation into labour force, such as facilitating access to funds particularly developed for women entrepreneurs.	<ul style="list-style-type: none"> <li>▪ Public Institutions</li> <li>▪ NGOs and International Organizations</li> <li>▪ Private sector (social responsibility funds)</li> </ul>	Mid-Term
Establishing a central database containing the information of entrepreneurs who receive various supports in the field of entrepreneurship, ensuring the follow-up of the activity and supports.	<ul style="list-style-type: none"> <li>▪ Public Institutions</li> </ul>	Mid-Term
Informing entrepreneurs about reporting standards and international credit criteria.	<ul style="list-style-type: none"> <li>▪ Chambers of Industry</li> <li>▪ Chambers of Commerce</li> <li>▪ Financial Institutions</li> </ul>	Mid-Term
Establishment of a credit guarantee mechanism that can provide support innovative entrepreneurs for commercialisation of their project ideas.	<ul style="list-style-type: none"> <li>▪ Public Institutions</li> <li>▪ Financial Institutions</li> </ul>	Mid-Term
Establishing mechanisms and organising events that will bring entrepreneur initiatives together with early stage fund supports such as angel investors and venture capital.	<ul style="list-style-type: none"> <li>▪ Techoparks</li> <li>▪ Chambers of Commerce and Industry</li> <li>▪ NGOs and International Organizations</li> <li>▪ Public Institutions</li> </ul>	Mid-Term
Informing entrepreneurs about existing crowdfunding opportunities and encouraging their access to such mechanisms.	<ul style="list-style-type: none"> <li>▪ Chambers of Commerce and Industry</li> <li>▪ NGOs and International Organizations</li> <li>▪ Public Institutions</li> </ul>	Short-Term



Organising project writing and project management training programmes to encourage more applications by entrepreneurs for existing grants and supports.	<ul style="list-style-type: none"> <li>Chambers of Commerce and Industry</li> <li>NGOs and International Organizations</li> <li>Public Institutions</li> </ul>	Mid-Term
Encouraging the applications of institutions that support entrepreneurs in the ecosystem to national and international projects and organizing training programs for this.	<ul style="list-style-type: none"> <li>Public Institutions</li> <li>NGOs and International Organizations</li> </ul>	Mid-Term
<b>Access to Markets</b>		
Organising business-to-business matching (B2B) programmes that will enable SuTP and LHC entrepreneurs to form partnerships and to complement each other.	<ul style="list-style-type: none"> <li>Chambers of Commerce and Industry</li> <li>NGOs and International Organizations</li> <li>Public Institutions</li> </ul>	Mid-Term
Establishing platforms that will increase communication between entrepreneurs and medium and large-scale companies for the integration of entrepreneurs to their supply chains.	<ul style="list-style-type: none"> <li>Public Institutions</li> <li>NGOs and International Organizations</li> <li>Entrepreneurship Centres</li> </ul>	Mid-Term
Establishment of cooperation programs for entrepreneurs and SuTP employees to benefit the knowledge of the Middle East market in a way to support exports.	<ul style="list-style-type: none"> <li>NGOs and International Organisations</li> <li>Public institutions</li> <li>Exporter Associations</li> <li>Chambers of Commerce and Industry</li> </ul>	Long-Term
Including market research, online marketing and social media use in the entrepreneurship trainings curriculum.	<ul style="list-style-type: none"> <li>NGOs and international organisations</li> <li>Chambers of Commerce and Industry</li> <li>Municipalities</li> <li>Public institutions</li> </ul>	Mid-Term
Providing mentorship support to SuTP entrepreneurs in commercializing their products and accessing local, regional and international markets.	<ul style="list-style-type: none"> <li>Entrepreneurship Centres,</li> <li>NGOs and international organisations</li> <li>Chambers of Commerce and Industry</li> <li>Techoparks</li> </ul>	Mid-Term





<b>Giving priority support to initiatives that can support the collaborations of local and SuTP entrepreneurs</b>	<ul style="list-style-type: none"> <li>International Organisations</li> <li>Public institutions</li> </ul>	Mid-Term
<b>Primarily supporting export-oriented SuTP entrepreneurs.</b>	<ul style="list-style-type: none"> <li>International Organisations</li> <li>Public institutions</li> </ul>	Mid-Term
<b>Increasing awareness on both firm and entrepreneurial bases so that SuTP entrepreneurs can benefit from social responsibility projects of corporate companies.</b>	<ul style="list-style-type: none"> <li>Chambers of Commerce and Industry</li> <li>International Organisations</li> <li>Public institutions</li> <li>Private Sector</li> </ul>	Short-Term
<b>Improving Human Capital</b>		
<b>Establishing a coordination mechanism covering all stakeholders and strengthening communication mechanisms among stakeholders in order to ensure effectiveness and sustainability for training supports for SuTPs.</b>	<ul style="list-style-type: none"> <li>Public institutions</li> <li>Chambers of Commerce and Industry</li> <li>NGOs and International Organizations</li> <li>Entrepreneurship Centres</li> </ul>	Short-Term
<b>Providing entrepreneurship training programmes in summer camps and youth centres for young people and students.</b>	<ul style="list-style-type: none"> <li>Entrepreneurship Centres</li> <li>Municipalities</li> <li>NGOs and International Organizations</li> <li>Universities</li> </ul>	Mid-Term
<b>Building skills suitable for the digital transformation that requires changes in the production processes and business processes of entrepreneurs.</b>	<ul style="list-style-type: none"> <li>Chambers of Commerce and Industry</li> <li>Organized Industrial Zones</li> <li>Public institutions</li> </ul>	Mid-Term
<b>Increasing awareness and disseminating support such as childcare services in order to increase the participation of women SuTP entrepreneurs in activities.</b>	<ul style="list-style-type: none"> <li>Public Institutions</li> <li>NGOs and international organisations</li> <li>Municipalities</li> </ul>	Mid-Term



Organising competitions to encourage young people with innovative and commercial projects to develop and implement their projects.	<ul style="list-style-type: none"> <li>▪ Techoparks</li> <li>▪ Entrepreneurship Centres</li> <li>▪ NGOs and International Organizations</li> </ul>	Mid-Term
Creating programmes in universities to train technical staff according to the needs of the target industries and sectors where the business world is willing to invest.	<ul style="list-style-type: none"> <li>▪ Universities</li> <li>▪ Chambers of Commerce and Industry</li> <li>▪ Organized Industrial Zones</li> <li>▪ Public Institutions</li> </ul>	Long-Term
Organising training and internship programs to train qualified personnel needed by entrepreneurs.	<ul style="list-style-type: none"> <li>▪ Universities</li> <li>▪ Chambers of Commerce and Industry</li> <li>▪ Organized Industrial Zones</li> <li>▪ Public Institutions</li> </ul>	Mid-Term
Putting entrepreneurship courses in the curriculum of universities.	<ul style="list-style-type: none"> <li>▪ Universities</li> <li>▪ Public institutions</li> <li>▪ Private Sector</li> </ul>	Mid-Term
<b>Media and Awareness Levels</b>		
Using different communication tools such as internet, e-mail, posters, etc., through public institutions, municipalities and NGOs to increase the entrepreneurship culture with different approaches.	<ul style="list-style-type: none"> <li>▪ Universities</li> <li>▪ Public institutions</li> <li>▪ NGOs and International Organizations</li> <li>▪ Municipalities</li> <li>▪ Entrepreneurship Centres</li> </ul>	Mid-Term
Increasing the awareness levels on migration issues of the personnel of key institutions serving for entrepreneurs.	<ul style="list-style-type: none"> <li>▪ Universities</li> <li>▪ NGOs and International Organizations</li> <li>▪ Public institutions</li> </ul>	Mid-Term
Establishing support mechanisms for the preparation of academic research and reports focusing on the increase in contributions of SuTP entrepreneurs to the economy on provincial level.	<ul style="list-style-type: none"> <li>▪ Public institutions</li> <li>▪ NGOs and International Organizations</li> </ul>	Mid-Term



Establishing continuous consultation mechanisms that support social integration and address the problems of SuTP entrepreneurs with the representatives of entrepreneurship-oriented NGOs, universities, professional chambers, public institutions and experienced SuTP entrepreneurs,	<ul style="list-style-type: none"> <li>▪ Universities</li> <li>▪ Public institutions</li> <li>▪ NGOs and International Organisations</li> <li>▪ Municipalities</li> <li>▪ Entrepreneurship Centres</li> <li>▪ Technoparks</li> <li>▪ Chambers of Commerce and Industry</li> </ul>	Mid-Term
Promoting good practices as visible examples in order to reduce prejudices on the accessibility of grants and supports for entrepreneurs.	<ul style="list-style-type: none"> <li>▪ NGOs and International Organisations</li> <li>▪ Chambers of Commerce and Industry</li> <li>▪ Public Institutions</li> <li>▪ Media</li> </ul>	Mid-Term
Sharing the stories of SuTP entrepreneurs who make exports and provide employment, as well as successful LHC-SuTP business partnership examples.	<ul style="list-style-type: none"> <li>▪ NGOs and International Organisations</li> <li>▪ Chambers of Commerce and Industry</li> <li>▪ Public Institutions</li> <li>▪ Media</li> </ul>	Mid-Term
Encouraging SuTP and LHC to produce together by establishing women cooperatives.	<ul style="list-style-type: none"> <li>▪ NGOs and International Organisations</li> <li>▪ Chambers of Commerce and Industry</li> <li>▪ Cooperative Unions</li> <li>▪ Public Institutions</li> </ul>	Mid-Term

