Institutional Accompaniment and the Formalization of An Artisanal Mole Microenterprise in Hidalgo, Mexico: An Evaluative Case Study

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ABSTRACT

In 2024, the informally employed population accounted for 54.4% of employment in Mexico and generated 25.4% of gross domestic product; in the state of Hidalgo, labor informality exceeds 71%. Informality limits access to public programs, invoicing, and legal protection. This study evaluated the effectiveness (efficacy and efficiency) of business management strategies promoted by the Hidalgo State Ministry of Economic Development in a woman-led artisanal mole microenterprise that had operated informally for over 20 years in a rural municipality of the Sierra Alta region. An applied, descriptive-evaluative single case study with a predominantly qualitative mixed-methods approach was conducted, with measurements 72 days apart, before and after a 53-day intervention, and no comparison group. Data came from a semi-structured interview, a structured survey, an analysis of strengths, weaknesses, opportunities, and threats, and documentary records. Six sequenced strategies were implemented: institutional linkage, business training, tax training, definition of a commercial identity, a trademark application, and an application for the Hecho en México (Made in Mexico) seal. Case records showed an increase from zero to four linked institutions, 30 institutional interactions, tax registration under the Simplified Trust Regime, and the filing of both applications, at a direct cost of MXN 728.64. The participant reported that her entrepreneurial self-assessment rose from 2 to 5 points and that her income increased by approximately 30% during the high season. A follow-up more than 10 months later verified the trademark registration, the granting of the seal, and continued tax registration. The results suggest that personalized accompaniment was associated with lower perceived institutional distance and with formalization once the entrepreneur identified concrete benefits. The design does not allow causal attribution. The study provides a traceable record of the process and a replicable framework for evaluating public interventions in rural contexts.

Keywords: Institutional Accompaniment, Informal Microenterprise, Trademark Registration, Rural Women Entrepreneurs

INTRODUCTION

Informality is the dominant feature of Mexico's productive structure, not a marginal phenomenon. In 2023, 5,468,180 private and parastatal economic units operated in the country, and 64.3% of them did so informally (Instituto Nacional de Estadística y Geografía [INEGI], 2025a). Employment shows a similar pattern: in the second quarter of 2026, the national labor informality rate was 55.1%, and it reached 55.8% among women (INEGI, 2026b). However, this population generates a much smaller share of output: in 2024, the informally employed population accounted for 54.4% of employment and contributed 25.4% of gross domestic product (GDP), whereas the formal sector generated 74.6% of GDP with 45.6% of employment (INEGI, 2025b).

The gap widens at the territorial level. Hidalgo recorded a labor informality rate of 71.3% in the fourth quarter of 2025 (INEGI, 2026a), well above the national rate of about 55% (INEGI, 2026b). In the country's business structure, microenterprises account for 95.4% of economic units and 41.4% of employed personnel, but only 16.0% of gross census value added (INEGI, 2025a). Informality also has a gender dimension: as of March 2021, women entrepreneurs represented 26% of employed women, 82% of them operated informally, and formal women entrepreneurs had average incomes 2.5 times higher than informal ones (Instituto Mexicano para la Competitividad [IMCO], 2021).

Public support exists, but it does not reach the entire entrepreneurial population: many entrepreneurs are unaware of it or distrust the procedures involved. A 2003 government study estimated that only 1.8% of micro, small, and medium-sized enterprises (MSMEs) knew about and had used public programs (Comisión Intersecretarial de Política Industrial, 2003, as cited in Saavedra García et al., 2013, p. 6). Two decades later, 73.6% of entrepreneurs reported not knowing about government business support programs, and only 20.7% of firms had received some type of support from public or private institutions (Asociación de Emprendedores de México, 2025). The distance is also one of trust: in 2023, 83.1% of the adult urban population considered acts of corruption to be frequent, and 14.0% of those who carried out procedures, payments, or public service requests, or had contact with a public servant, experienced at least one such act (INEGI, 2024).

This article examines the distance between institutional support and the experience of people who run businesses in the informal economy through the case of a woman entrepreneur who, since 2003, has produced and sold red mole paste in a rural municipality of the Sierra Alta region of Hidalgo, using a family recipe passed down for more than eight decades. The business grew organically, sustains the household income, and enjoys local recognition, but it remained informal, without a consolidated commercial identity or legal protection of its name. In September 2025, the entrepreneur requested support from the Hidalgo State Ministry of Economic Development (Secretaría de Desarrollo Económico del Estado de Hidalgo [SEDECO]). During the diagnosis, she reported having lost a recurring weekly sale because she could not issue invoices, and she described public procedures as complex, costly, and difficult to access for businesses without premises or registration.

The literature shows that informality arises from a mismatch between formal rules and social norms (Webb et al., 2009), that simplifying procedures or providing training has modest effects (Bruhn & McKenzie, 2014; McKenzie & Woodruff, 2014), and that personalized advisory services can generate substantial and lasting improvements (Bruhn et al., 2018). However, this evidence comes from aggregate comparisons or impact evaluations involving hundreds of firms. Less is known about the social process through which an informal, rural woman entrepreneur engaged in a traditional food trade moves toward formality when she receives accompaniment: which barriers she perceives, which services are combined, in what order, at what cost, and with what verifiable results.

The general research question was how and to what extent the business management strategies promoted by SEDECO contributed to strengthening the competitiveness, growth, and sustainability of the business. The specific objectives were to (a) identify the business's current management strategies and areas for improvement; (b) select the most relevant strategies from those offered by the agency; (c) design adapted strategies; (d) implement them; (e) evaluate their effects on business management; and (f) compare indicators before and after the intervention.

The contribution of this work is a phase-by-phase analytical description, supported by verifiable data, of how institutional accompaniment translated into institutional linkage, tax formalization, and protection of commercial identity, distinguishing documentary evidence from results reported by the participant. It also proposes efficacy and efficiency indicators applicable to individual cases and gives visibility to a population that is underrepresented in the evaluation of business promotion policies: women who run traditional trades in rural municipalities.

LITERATURE REVIEW

Informality, institutions, and social legitimacy

Institutional theory distinguishes between formal institutions (laws, regulations, and procedures) and informal institutions (norms, values, and codes of conduct), which together structure people's incentives (North, 1990). From this perspective, informal entrepreneurship is not necessarily illegitimate. Webb et al. (2009) describe it as activity that falls outside what formal institutions prescribe but is acceptable according to the norms of the social groups in which it occurs. A cook who has sold mole to her community for two decades operates in this zone: her trade is socially legitimate even though it is not registered. Accordingly, Webb et al. (2013) propose studying the informal economy as a space of entrepreneurial activity with its own dynamics rather than merely as a deviation from the norm.

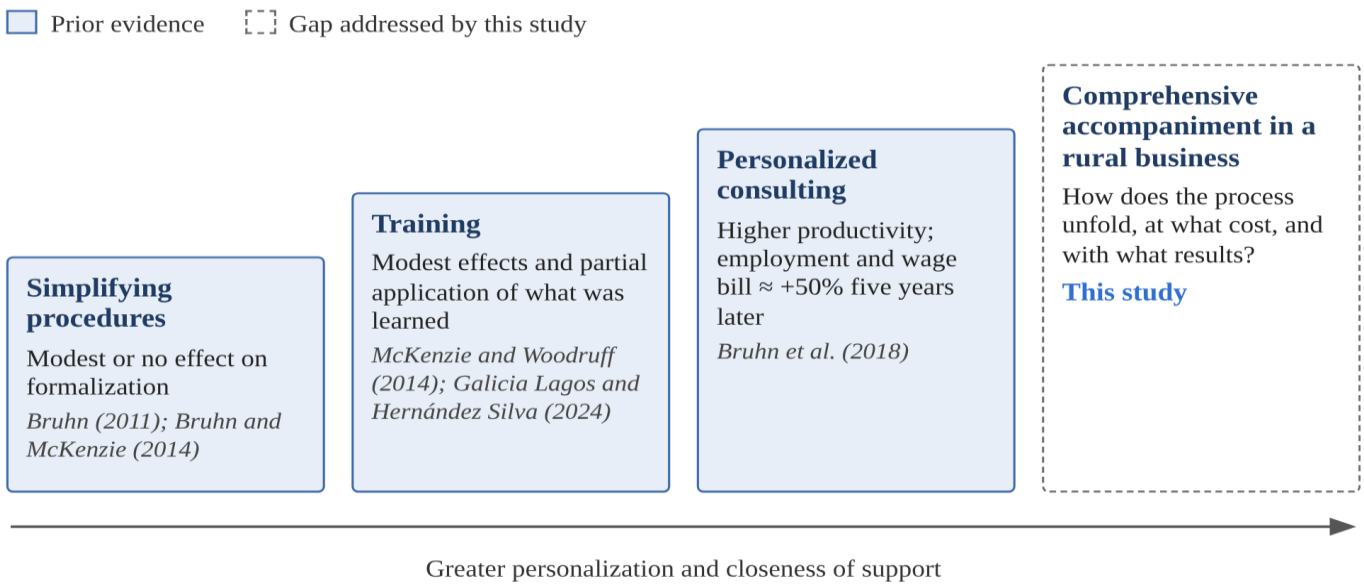
Williams and Shahid (2016) add two nuances. First, informality is a continuum rather than a dichotomy: in their survey of 300 entrepreneurs in Lahore, Pakistan, 62% operated wholly informally, 31% largely informally, 7% largely formally, and none wholly formally. Second, degrees of informality are associated with the asymmetry between formal rules and social norms. Cross-country comparative studies confirm the weight of the institutional environment. Autio and Fu (2015) estimated, for 18 Asia-Pacific countries between 2001 and 2010, that a one-standard-deviation improvement in the quality of economic and political institutions could double the rate of formal entrepreneurship and halve the rate of informal entrepreneurship. Thai and Turkina (2014) showed that economic opportunities, governance quality, aggregate resources and capabilities, and culture drive each type of entrepreneurship differently, and Dau and Cuervo-Cazurra (2014) analyzed the effect of pro-market institutions on both.

Formalization and business support: Evidence from interventions

Experimental evidence qualifies the idea that simplifying procedures is enough. In Mexico, the reform that simplified business registration in several municipalities increased the number of registered businesses by 5% and wage employment by 2.2%. This increase came from former wage earners who opened businesses; owners of preexisting informal businesses were not more likely to register (Bruhn, 2011). Reviewing similar reforms in developing countries, Bruhn and McKenzie (2014) concluded that they produce modest or no increases in formality because most informal businesses do not obtain a net benefit from formalizing. Training follows a similar pattern: evaluated programs have modest effects on the survival of existing businesses, and their owners adopt only some of the practices taught (McKenzie & Woodruff, 2014).

Personalized advisory services show different results. In an experiment with 432 small and medium-sized enterprises in Puebla, access to one year of subsidized consulting increased total factor productivity, return on assets, and an index of entrepreneurial spirit that measures owners' confidence and goal setting; five years later, the number of employees and the wage bill of treated firms were about 50% higher (Bruhn et al., 2018). The practices that improved most were marketing, financial accounting, and long-term planning. Figure 1 organizes this evidence according to the closeness of support: the results suggest larger effects the more personalized the accompaniment, but the studies reviewed do not document how this process unfolds in a rural informal business.

Figure 1: Evidence on formalization interventions according to the personalization of support



Note. Prepared by the authors based on Bruhn (2011), Bruhn and McKenzie (2014), McKenzie and Woodruff (2014), Galicia Lagos and Hernández Silva (2024), and Bruhn et al. (2018).

Business promotion policies and perceptions of institutions in Mexico

National studies agree that public support for MSMEs has had limited reach. Saavedra García et al. (2013) examined the evolution of these firms between 1994 and 2008 and the evaluations of the SME Fund (Fondo PYME) and concluded that support and promotion policies had not yet found an adequate channel, particularly for microenterprises (p. 16). Drawing on expert assessments from the Global Entrepreneurship Monitor, Contreras Cueva et al. (2021) identified relatively unfavorable conditions in taxation, bureaucracy, and basic education, as well as the need for policies on tax rates, regulation, and programs that foster entrepreneurial spirit.

At the level of individual experience, Mellado Ibarra and Sánchez Tovar (2024) interviewed four informal women entrepreneurs in Ciudad Victoria and found that the reasons they did not formalize were unawareness of the advantages of operating within the regulatory framework, a perceived high tax burden, and distance from the authorities, even though the state offered business registration within three working days. The authors conclude that streamlining processes is not enough and that perceptions of institutions must also change (p. 15). In Hidalgo, Galicia Lagos and Hernández Silva (2024) analyzed how schooling, training, and financing influence business survival in Tizayuca: 94.4% of respondents considered the courses they had received useful, but only 11.8% applied everything they had learned.

Gender, territory, and traditional knowledge

The gender dimension cuts across these barriers. Family pressures and care responsibilities limit the time and resources women can devote to entrepreneurship (Mellado Ibarra & Sánchez Tovar, 2024, p. 6). For many women, entrepreneurship is the option that allows them to combine these tasks with the need to earn their own income, although most do so informally (IMCO, 2021). In rural municipalities, these barriers may be compounded by the distance from the offices where public services are concentrated. When the activity is based on inherited culinary knowledge, the community legitimacy of the product coexists with the absence of formal protection of its name and identity.

The literature converges on three ideas. Public support exists, but its reach is limited, especially among microenterprises. Perceived barriers (complexity, cost, and distrust), in addition to objective ones, influence the decision to formalize. And the effect of support depends on its effective application and on whether the

person perceives a concrete benefit. However, there is a lack of process evidence showing how these elements fit together in a specific case, with verifiable timelines, costs, and results, from the entrepreneur's perspective.

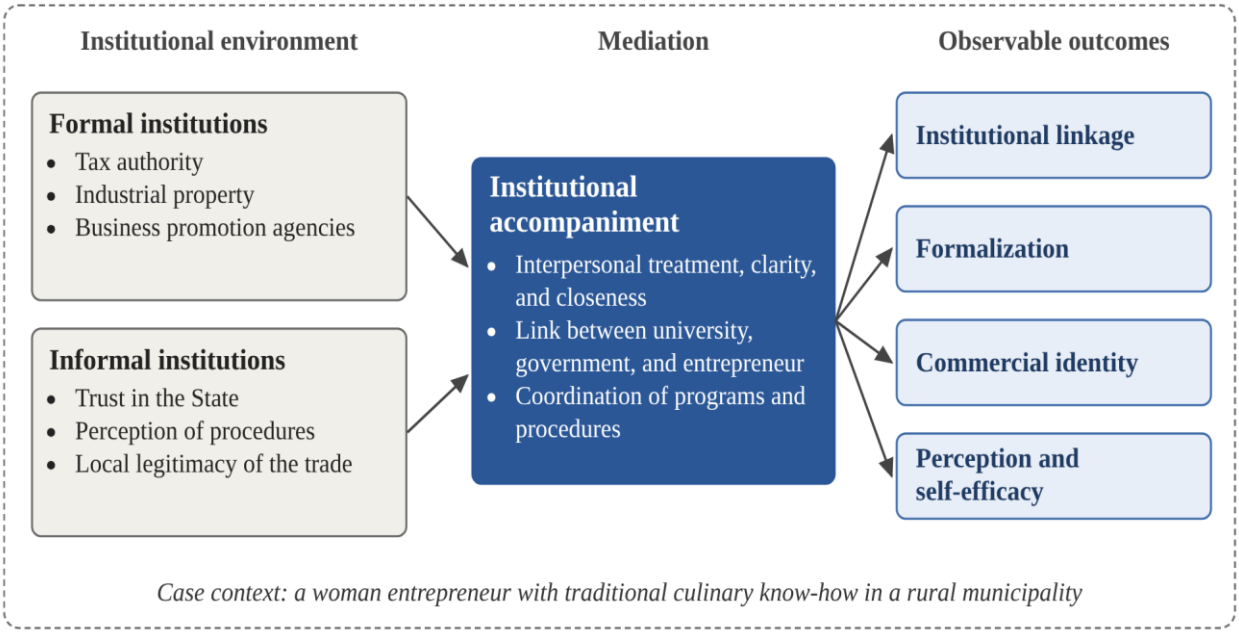
THEORETICAL FRAMEWORK

The study integrates three social science perspectives. The first is the institutional theory of informality (North, 1990; Williams & Shahid, 2016): the decision to formalize depends on the fit between formal rules and social norms and on the benefit the person expects to obtain. The second is the street-level bureaucracy approach (Lipsky, 2010), according to which public policy materializes in everyday interactions between public servants and citizens; in this case, the quality of that interaction (interpersonal treatment, clarity, and closeness) is part of the intervention. The third is the triple helix model (Etzkowitz & Leydesdorff, 2000), which describes collaboration among universities, government, and the productive sector; here, a university student completing a professional residency acted as a liaison between the state agency, its affiliated bodies, and the entrepreneur.

Three constructs structure the model. Formalization is understood as a gradual process rather than a single change of status: economic units move through degrees of formality (Williams & Shahid, 2016), which in this study are observed in tax registration, trademark protection, and the granting of quality seals. Institutional accompaniment refers to the personalized and continuous support through which an agent linked to the agency coordinates programs and procedures with the entrepreneur; it draws on Lipsky's (2010) idea that public policy takes concrete form in interactions between public servants and citizens. Perceived institutional distance refers to the degree to which the entrepreneur perceives the authorities and their procedures as remote, complex, or alien to her business, a barrier that Mellado Ibarra and Sánchez Tovar (2024) identified among the reasons for remaining informal.

Figure 2 shows how these perspectives fit together in the study's conceptual model. On the left is the institutional environment, which combines formal institutions (tax, industrial property, and business promotion authorities) and informal institutions (trust in the State, perceptions of procedures, and the local legitimacy of the trade). In the center, institutional accompaniment mediates between that environment and the business. On the right are the four observable outcomes the study evaluates. The case context, a woman entrepreneur with traditional know-how in a rural municipality, conditions the entire process.

Figure 2: Conceptual model of the study



Note. Prepared by the authors based on North (1990), Etzkowitz and Leydesdorff (2000), Lipsky (2010), and Williams and Shahid (2016).

Following Fernández Chaves (2004), effectiveness was operationalized as the combination of efficacy (achievement of the expected results) and efficiency (use of resources, time, and processes). The team of SEDECO's Directorate of Entrepreneurship and Competitiveness Support (Dirección de Apoyo al Emprendimiento y a la Competitividad) and the researcher translated this criterion into the indicators in Table 1, based on the dimensions that Mellado Ibarra and Sánchez Tovar (2024) use to characterize formalization and contact with the authorities. Both the strategies and the dimensions were adapted to the time available for the intervention. SEDECO operates various promotion programs, but the study period did not allow all of them to be implemented and evaluated; therefore, in line with the second specific objective, priority was given to those that lay the foundations for formalization: institutional linkage, tax regularization, and protection of commercial identity.

Table 1: Operationalization of effectiveness by dimension, indicator, and effectiveness component

Dimension	Indicators	Effectiveness component
Institutional linkage	Linked institutions and programs; number of interactions	Efficiency
Formalization	Tax status; obligations; industrial property and seal applications	Efficiency
Commercial identity	Satisfaction with the design; response time; cost	Efficacy and efficiency
Perception and self-efficacy	Usefulness of support; clarity of information; entrepreneurial self-assessment (1–5 scale); intention to continue	Efficacy
Business results	Income variation; new customers	Efficacy

Note. Prepared by the authors based on Fernández Chaves (2004) and the structure of the project instrument (2025).

METHODOLOGY

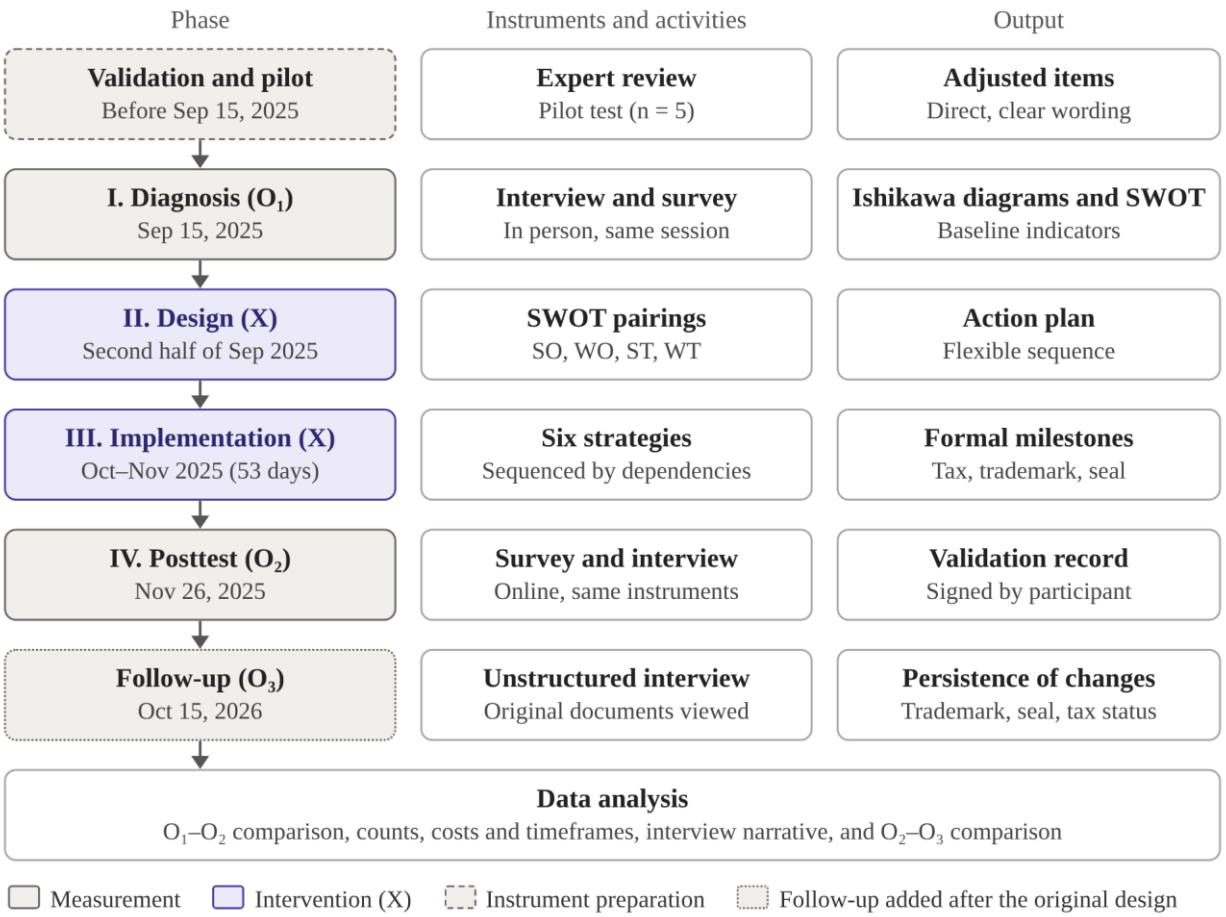
Fieldwork was conducted between August and December 2025. In-person sessions took place at SEDECO's offices in Pachuca de Soto; the rest of the accompaniment was remote (video calls, telephone, email, and instant messaging) because the business's municipality is about three hours from the state capital.

Research design

An applied single case study was conducted with a predominantly qualitative mixed-methods approach and a descriptive-evaluative scope. The design responds to both parts of the research question. The "how" part concerns a contemporary process in its real-life context, the conditions under which Yin (2018) recommends the case study. The design also makes it possible to observe what evaluations involving hundreds of firms do not show: how barriers, services, costs, and results fit together in a specific business. The "to what extent" part is addressed with the quantitative component, which compares the indicators in Table 1 before and after the intervention. Because the competitiveness, growth, and sustainability of the business constitute the long-term horizon of the intervention rather than outcomes observable within 72 days, this part is answered with the changes observed in those indicators, without attributing them causally to the intervention. As Flyvbjerg (2006) argues, social science "may be strengthened by the execution of a greater number of good case studies" (p. 219).

The study included two measurements with the same instruments: a diagnostic measurement (O_1, September 15, 2025) and a postintervention measurement (O_2, November 26, 2025). The 72 days between them were used to design and implement the intervention (X), with the accompaniment of the research team. In terms of control, this is a single-case pretest–posttest design without random assignment or a comparison group (Hernández Sampieri et al., 2014; Shadish et al., 2002). Figure 3 summarizes the complete research process, from the preparation of the instruments to the analysis.

Figure 3: Overview of the research process



Note. Prepared by the authors. O_1 = diagnostic measurement; X = intervention; O_2 = postintervention measurement; O_3 = follow-up. SWOT = strengths, weaknesses, opportunities, and threats; SO, WO, ST, and WT = strengths–opportunities, weaknesses–opportunities, strengths–threats, and weaknesses–threats pairings.

The design makes it possible to describe the changes between O_1 and O_2 but not to attribute them causally to the intervention, because it does not control for several threats to internal validity (Shadish et al., 2002): history (simultaneous external events), maturation of the business, the effect of having completed the first measurement (testing), and the change in the mode of administration (instrumentation), since O_1 was administered in person and O_2 online. In addition, responses may be biased by social desirability, and the researcher had a dual role, as she both implemented and evaluated the intervention. To limit these risks, the results were supported by documentary evidence whenever possible and were distinguished from self-reports, as described in the Data Analysis section. Self-selection of the case adds to these limitations: the entrepreneur requested support on her own initiative, which suggests a greater willingness to change than that of other people in the informal economy and limits the transfer of the findings to similar cases (Shadish et al., 2002).

Population and sample

Because this is a case study, no population was defined for statistical inference. In this type of study, the population is conceived not as a broad set of individuals but as the actors, processes, or contexts that make up the phenomenon under investigation (Hernández Sampieri et al., 2014). In this case, it was delimited to the entrepreneur and the accompaniment process she received. Microenterprises that come to the Directorate seeking guidance are the group to which the findings can be generalized analytically, not statistically (Yin, 2018).

The unit of analysis was a family microenterprise producing artisanal red mole paste, and the informant was its founder and owner. The case was not selected through probability sampling: it was included following the entrepreneur's voluntary request for support, which makes it an opportunity sample, that is, a case that presents itself when the research requires it (Hernández Sampieri et al., 2014). It is also what Yin (2018) calls a common case, useful for capturing the conditions of an everyday situation: that of people who run informal businesses and turn to a public agency for support. The case met the conditions that define the research problem: an operating business whose tax status did not match its activity and that had no registered trademark, and whose owner sought support on her own initiative.

The entrepreneur started the business in 2003, after becoming a mother for the second time, as a strategy to contribute to household income. The business is based on a family recipe with more than eight decades of tradition and operates from her home. According to the participant, sales grew from 6 kg per month at the outset to between 90 and 120 kg per month at the time of the study, with customers who have been buying from her for more than 10 years and shipments to nearby municipalities. At the start of the research, the business had no consolidated trade name or registered trademark, and its tax status did not match the activity it carried out. To protect the participant's identity, her name, the name of the municipality, and the trade name being registered are omitted.

Five women entrepreneurs who came to the Directorate for guidance between August 20 and September 5, 2025, participated in the pilot test of the instruments; they were selected through convenience sampling from among the people served during that period. They were not part of the case, and their responses were excluded from the analysis.

Instruments

Four sources of information were used. Before being applied to the case, the interview guide and the survey were reviewed by experts and pilot tested, as described below.

1. Diagnostic interview guide. It was developed for this study to conduct a semi-structured interview at the first consultation. It explores motivations, the business situation, formalization, commercial identity, industrial property, and sales opportunities. It was also designed to standardize initial consultations at the Directorate. In the postintervention measurement, it was reused with a focus on the indicators in Table 1.

2. Structured survey (Comprehensive Evaluation Instrument). It was developed with the Directorate's team and is aligned with its services. It consists of 27 items in six sections (Table 2). Perceived institutional distance was assessed mainly through the interview; Section II of the survey provided complementary information on contact with the authorities.

3. Strengths, weaknesses, opportunities, and threats (SWOT) matrix. It was used to integrate the diagnosis and generate strategic combinations (David, 2013).

4. Documentary records. These include meeting minutes, emails, training certificates, filing receipts, payment receipts, and the results validation record signed by the participant.

Table 2: Survey structure by section and item type

Section	Open-ended	Dichotomous	Multiple choice	Scale	Total
I. General business data	1	1	2	0	4
II. Contact with the authorities	1	2	0	0	3
III. Business formalization	1	5	3	0	9
IV. Product identity	2	2	3	2	9
V. Entrepreneurial self-assessment	0	0	0	1	1

VI. Future prospects of the business	1	0	0	0	1
Total	**6**	**10**	**8**	**3**	**27**

Note. Prepared by the authors. The Scale column groups Likert-type and compliance-scale items.

Validity and reliability

Content validity was addressed through expert judgment, understood as the informed opinion of people with experience in the field who are recognized as qualified to provide judgments and assessments (Escobar-Pérez & Cuervo-Martínez, 2008). Before the pilot test, the interview guide and the survey were reviewed by six experts in entrepreneurship, drawn from the Directorate's staff and from academia, who submitted their comments in writing. The only adjustment resulting from these comments was to rephrase the items as direct, clear questions that a self-taught entrepreneur with no technical knowledge of business administration or taxation could understand.

Internal consistency reliability was not estimated for two reasons: the questionnaire is not a scale, as only three items are scale items and they are spread across two sections, and a single participant does not allow coefficients such as Cronbach's alpha to be calculated. The reliability of the case study was addressed with the resources proposed by Yin (2018): dated records were organized into a case study database so that each claim can be traced back to its source. Overall, the survey results are interpreted as descriptive evidence.

Pilot test

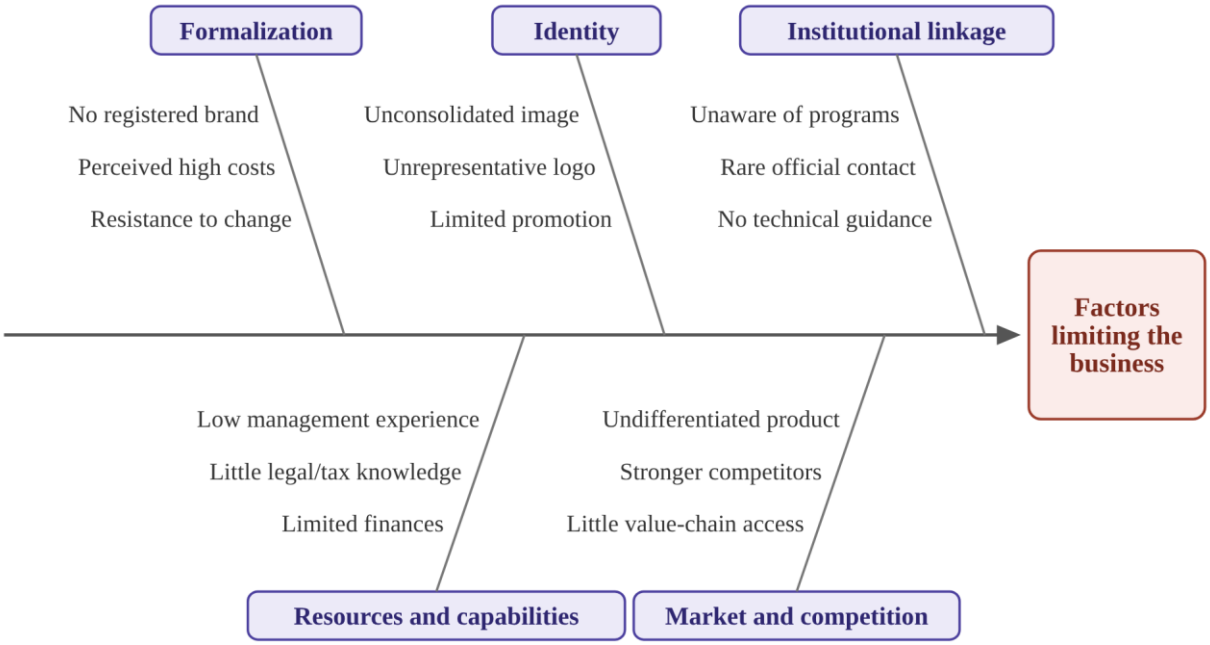
Before the diagnostic measurement, the guide and the survey were piloted with the five entrepreneurs described in the Population and Sample section to verify comprehension of the items and estimate administration time. Three administrations were in person and lasted 40 minutes each, and two were remote and lasted 35 minutes each, for an average of 38 minutes. Some questions still raised doubts, which partly explains this duration; they were adjusted in the same direction, replacing specialized terms with everyday expressions. The participants gave verbal consent after being informed of the purpose of the exercise.

Procedure

Data collection was organized into four phases.

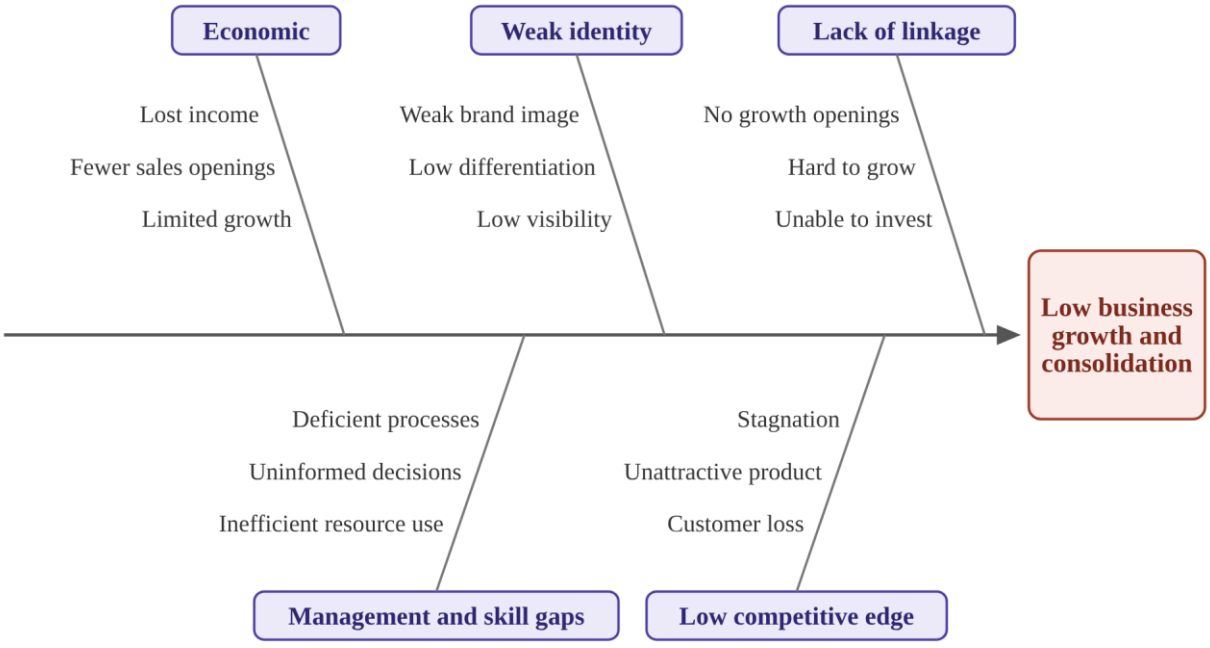
Phase I. Diagnosis (O_1). On September 15, 2025, the interview and the survey were administered in the same session at SEDECO's facilities, with the work team present. Based on both, the causes and effects of the problem were organized into Ishikawa diagrams (Figures 4 and 5), and the SWOT matrix was constructed. The team also checked the Directorate's records for participation by residents of the municipality in current programs.

Figure 4: Ishikawa diagram of the causes of the problem



Note. Prepared by the authors based on the diagnostic interview and survey.

Figure 5: Ishikawa diagram of the effects of the problem



Note. Prepared by the authors based on the diagnostic interview and survey.

Phase II. Design of the intervention (X). During the second half of September 2025, the Directorate's team and the researcher translated the diagnosis into an action plan. The SWOT pairings (strengths–opportunities [SO], weaknesses–opportunities [WO], strengths–threats [ST], and weaknesses–threats [WT]) generated strategic alternatives (David, 2013), which were compared with the causes in the Ishikawa diagram (Figure 4)

and with the programs available at the agency and its affiliated bodies, considering interventions feasible within the set timeframe. This comparison yielded six strategies, each aimed at a diagnosed cause (Table 3).

Selection followed three criteria: relevance to the diagnosed causes, feasibility within the intervention period, and low direct cost for the entrepreneur, given that the perception of high costs was among the causes of her informality. The sequence was ordered according to the dependencies between strategies. Institutional linkage was scheduled first because distance from the authorities is one of the reasons women entrepreneurs remain informal (Mellado Ibarra & Sánchez Tovar, 2024); the commercial identity had to be defined before the trademark application was filed; and each formal application was preceded by specific training. This last decision responds to evidence that isolated training has modest effects and is applied only in part (Galicia Lagos & Hernández Silva, 2024; McKenzie & Woodruff, 2014), whereas personalized accompaniment is associated with substantial improvements (Bruhn et al., 2018). The plan was conceived with a flexible sequence that could be adjusted to the institutions' schedules and the entrepreneur's availability.

Table 3: Traceability of the intervention strategies

Strategy	Diagnosed cause (Figure 4)	SWOT	Institutions	Weeks	Evidence
Institutional linkage	Unawareness of programs; little contact with the authorities	WO	SEDECO; municipal Secretariats of Economic Development and of Tourism; IHCE	1–2	Meeting minutes; emails
Business training	Limited management experience	WO	IHCE (weekly online sessions)	2–4	Training certificates
Tax training (followed by RESICO registration)	Little tax and legal knowledge; perceived high costs	WO	IHCE (training); SAT (registration)	4–6	Training certificate; tax status certificate
Commercial identity (trade name and logo)	Unconsolidated image; unrepresentative logo	SO	IHCE (logo design)	2–3	Payment receipt
Trademark application	No registered trademark	ST	IHCE (referral for the 90% fee discount); IMPI (portal account, training, application)	3–6	Payment receipt; filing receipt; registration certificate (O_3)
Hecho en México seal application	Little product differentiation	SO	SEDECO (training and application)	7–8	Filing receipt; resolution granting the seal (O_3)

Note. Prepared by the authors based on the case study database. Weeks are counted from the start of the intervention in early October 2025; week 8 ends in late November. SWOT = SWOT pairing that generated the strategy: SO = strengths–opportunities; WO = weaknesses–opportunities; ST = strengths–threats. IHCE = Instituto Hidalguense de Competitividad Empresarial; IMPI = Instituto Mexicano de la Propiedad Industrial; RESICO = Régimen Simplificado de Confianza; SAT = Servicio de Administración Tributaria (Tax Administration Service). The four linked institutions reported in Table 4 are the support institutions: SEDECO, IHCE, and the two municipal secretariats.

Phase III. Implementation of the intervention (X). The intervention was implemented over 53 days in October and November 2025. In line with the theoretical framework, the researcher acted as a liaison between the entrepreneur, the Directorate, and the participating institutions (Etzkowitz & Leydesdorff, 2000), and clarity and closeness of the interaction were considered part of the intervention rather than an incidental aspect (Lipsky, 2010). Each interaction was entered into the case study database with its date and type (direct or indirect), and each cost with its payment receipt.

Implementation proceeded in three blocks (Table 3). The first, linkage (weeks 1–2), comprised a meeting with the municipal authority, participation in a local promotion event, and a meeting with the Hidalgo Institute for Business Competitiveness (Instituto Hidalguense de Competitividad Empresarial [IHCE]). The second (weeks 2–6) laid the groundwork for the procedures: the trade name and logo, business training, the fee discount at the Mexican Institute of Industrial Property (Instituto Mexicano de la Propiedad Industrial [IMPI]), tax training on the Simplified Trust Regime (Régimen Simplificado de Confianza [RESICO]), and the IMPI portal account, documents, and training sessions. The third (weeks 6–8) concentrated the formal procedures: RESICO registration and the trademark and Hecho en México (Made in Mexico) seal applications, each preceded by specific training. Some activities ran in parallel, such as tax training and the IMPI fee-discount process, as the flexible plan allowed.

Phase IV. Postintervention evaluation (O_2). On November 26, 2025, the survey was readministered in digital format because the participant was unable to travel to Pachuca de Soto. An online interview was also conducted using the same guide, focusing on the indicators in Table 1. At the close, the participant signed a results validation record with the support of the municipal authority, which participated in coordination with SEDECO to facilitate the signing without intervening in the content of the record. The status of the procedures was recorded as of December 4, 2025.

Follow-up (O_3). On October 15, 2026, more than 10 months after the postintervention measurement, an unstructured interview was conducted with the entrepreneur to assess whether the changes had been sustained. During the interview, the trademark registration certificate, the resolution granting the Hecho en México seal, and her current tax status certificate were verified by inspecting the original documents. Her participation in local fairs and in funding calls was also explored. This follow-up was not part of the original design, so its results are reported as evidence of persistence rather than as an effect attributable to the intervention.

Data analysis

The analysis followed the strategy of relying on theoretical propositions (Yin, 2018). Three propositions were formulated from the theoretical framework; during data collection, they indicated what evidence to look for, and during the analysis, they served as patterns against which the results were compared:

P1. Personalized institutional accompaniment will be associated with lower perceived institutional distance insofar as clarity and closeness of the interaction counteract the perception of procedures as complex, costly, and alien (Lipsky, 2010; Mellado Ibarra & Sánchez Tovar, 2024).

P2. Formalization will advance by degrees and only in those components in which the entrepreneur identifies a concrete benefit, such as invoicing or the protection of her trademark (Bruhn & McKenzie, 2014; Williams & Shahid, 2016).

P3. Training will translate into action when it is immediately linked to a specific procedure, unlike isolated training, whose effects tend to be modest (Galicia Lagos & Hernández Silva, 2024; McKenzie & Woodruff, 2014).

The evidence was processed using five techniques: (a) a descriptive comparison between O_1 and O_2, section by section, reporting the direction and magnitude of each change without statistical tests, which are not appropriate for a single case; (b) a count of institutions, programs, and interactions based on the records, distinguishing direct interactions (meetings and sessions) from indirect ones (document and administrative

management); (c) a calculation of costs and timeframes based on payment and filing receipts, compared with the full official fee for each procedure and with the institutional time invested, estimated from the recorded interactions; (d) a narrative integration of the interviews, which were recorded with the participant's authorization and transcribed, organized according to the three constructs of the model; and (e) a comparison between the situation recorded at O_2 and that observed at follow-up (O_3) to assess the persistence of the changes.

Effectiveness was assessed using the two components defined in Table 1 (Fernández Chaves, 2004). Efficacy was judged by the fulfillment of the action plan: the implementation of the six strategies and the achievement of the three formal milestones, namely tax regularization, trademark registration, and the granting of the Hecho en México seal; the last two were verified at follow-up, once the procedures had been completed. Efficiency was judged by the direct cost and the time required to achieve these milestones, compared with the benchmarks described in (c).

Each proposition was considered supported when at least two different sources matched the expected pattern and one of them was documentary; partially supported when the pattern rested only on self-report; and not supported when the evidence contradicted it. To apply this rule, each result was classified by source: documentary evidence, team count, or self-report. Figure 6 shows which evidence of each type was used to test each proposition and to assess effectiveness. In particular, income variation was checked against the entrepreneur's sales records; activity after her RESICO registration, against the invoices issued; and the final status of the procedures, against the documents verified at follow-up. Participation in fairs and in funding calls is considered self-report. As an additional check, the participant reviewed and validated the results through the closing record.

Figure 6: Evidence matrix for testing the propositions

What is assessed	**Documentary evidence** greater weight	**Team count** from the records	**Self-report** lesser weight
P1 Perceived institutional distance	Minutes and emails documenting linkage with the municipal authority and institutions	Linked institutions; direct and indirect interactions	Interviews at O_1, O_2, and O_3; survey, Section II
P2 Formalization by degrees	Tax status certificate; invoices issued; filing receipts; trademark registration and seal resolution (O_3)	Formal milestones achieved	Perceived benefit of invoicing and of protecting the trademark (interviews)
P3 Training linked to a procedure	Training certificates and dated filing receipts	Days between each training activity and its application	Application of what was learned (interviews)
Effectiveness Efficacy and efficiency	Payment receipts; full official fees; sales records	Direct cost; estimated institutional time; timeframes	Entrepreneurial self-assessment (survey, Section V)

Decision rule for each proposition

Supported	**Partially supported**	**Not supported**
Two or more sources agree, and one is documentary	The pattern rests only on self-report	The evidence contradicts the expected pattern

Note. Prepared by the authors. O_1 = diagnostic measurement; O_2 = postintervention measurement; O_3 = follow-up.

The transcripts, sales records, invoices, and procedure documents were reviewed with the participant's authorization and, at her request, are neither reproduced nor appended; therefore, the results are presented as aggregate figures and percentages, without sales amounts or data that could identify her. Finally, the study did

not apply a formal qualitative coding procedure, so testimonies are presented as reported evidence rather than as analytical categories.

RESULTS AND DISCUSSION

The results are presented in the order of the specific objectives: first, the diagnostic situation; then, the assessment of each proposition; and finally, the effectiveness of the intervention and the persistence of the changes at follow-up. Table 4 summarizes the case indicators at the three measurements and the type of evidence supporting each one.

Table 4: Case indicators at diagnosis (O_1), the postintervention measurement (O_2), and follow-up (O_3)

Dimension	Indicator	O_1 (Sep 15, 2025)	O_2 (Nov 26, 2025)	O_3 (Oct 15, 2026)	Source
Institutional linkage	Linked institutions	0	4	—	Count
	Institutional interactions	—	30 (2 in person and 28 remote)	—	Count
Formalization	Tax status	Not consistent with the activity	Registered in RESICO	In RESICO	Documentary
	Trademark registration	Not registered	Application filed	Trademark registered	Documentary
	Hecho en México seal	No seal	Application filed	Seal granted	Documentary
Commercial identity	Trade name and logo	Not consolidated	Defined	—	Documentary
Perception and self-efficacy	Entrepreneurial self-assessment (1–5)	2	5	—	Self-report
Perceived institutional distance	Perception of procedures	Complex, costly, and difficult to access	Accessible	—	Self-report
Business results	Income variation	—	≈ +30%, during the high season	—	Self-report; invoices and own financial records
	Commercial activity	Local sales; loss of a weekly customer because she could not invoice	Customer recovered; increase in orders	Invitations to local fairs; search for financing	Self-report; invoices
Efficiency	Direct cost	—	MXN 728.64	—	Documentary
	Institutional time	—	≈ 60 hours	—	Count (estimate)

Note. Prepared by the authors based on the case study database (2025–2026). — = not applicable or not measured. The direct cost includes the logo design (MXN 416) and the trademark application with a 90% discount (MXN 312.64). The documents were reviewed with the participant's authorization and are not reproduced for confidentiality reasons.

Diagnostic situation

At O_1, the business had been operating informally for more than 20 years. It had no consolidated trade name or registered trademark, its tax status did not match its activity, and it had no link with any support institution. The participant rated herself 2 out of 5 on the entrepreneurial self-assessment and described public procedures as complex, costly, and difficult to access for a business without premises or registration. Informality already

had a visible cost: she had lost a recurring weekly sale because she could not issue invoices. The Ishikawa diagrams (Figures 4 and 5) grouped these conditions into five branches of causes, including unawareness of programs, the perception of high costs, and the lack of a protected commercial identity.

Institutional linkage and perceived distance (P1)

Between O_1 and O_2, the entrepreneur went from having no link with any institution to being linked with four: SEDECO; IHCE, which operates in coordination with SEDECO; and the municipal Secretariats of Economic Development and of Tourism. During this period, 30 institutional interactions were recorded: 2 in person and 28 remote. At O_2, the participant described the procedures as accessible, in contrast to the complexity, cost, and distance she had described at diagnosis.

The unexpected finding was that the municipal link already existed. Each municipality has an economic development office linked to SEDECO; in the case municipality, this channel existed but was not visible to the entrepreneur and only became operational when the state agency activated it. Support was therefore not lacking; what was lacking was the bridge that would make it accessible. This result illustrates why 73.6% of entrepreneurs report not knowing about government support programs (Asociación de Emprendedores de México, 2025): information may be available and still not reach those who need it.

These results are consistent with Mellado Ibarra and Sánchez Tovar (2024), who found that distance from the authorities is one of the reasons for remaining informal, and they qualify those authors' conclusion that perceptions of institutions need to change: in this case, the perception did not change because procedures were simplified, but because someone accompanied the entrepreneur through them. In Lipsky's (2010) terms, public policy took concrete form in the interaction with public servants and with the university resident who acted as a liaison between the university, government, and the productive sector (Etzkowitz & Leydesdorff, 2000). It is also noteworthy that this closeness did not depend on physical presence: 28 of the 30 interactions were remote, which suggests that, in municipalities far from the capital, remote accompaniment can also reduce perceived institutional distance. With coinciding documentary, count, and self-report evidence, P1 is considered supported, with one qualification: perception can only be known through self-report, whereas the records document closeness in behavior, not in perception.

Formalization by degrees (P2)

Formalization advanced in three steps during November 2025: RESICO registration, the trademark application, and the application for the Hecho en México seal (Table 3). At O_2, the last two procedures were still pending; at follow-up, the trademark had been registered, the seal had been granted, and the entrepreneur remained in RESICO. Each step responded to a concrete benefit: invoicing allowed her to recover the weekly customer she had lost before the intervention, and the trademark protected the commercial identity she had just defined.

This pattern is consistent with the idea that formality is a continuum rather than a change of status (Williams & Shahid, 2016) and with the argument that businesses formalize when they obtain a net benefit (Bruhn & McKenzie, 2014). It differs, however, from the municipal reform analyzed by Bruhn (2011), in which owners of preexisting informal businesses were not more likely to register: here, an entrepreneur with two decades in informality did formalize, albeit through accompaniment rather than through the mere simplification of procedures. From the perspective of Webb et al. (2009), formalization did not create the legitimacy of the trade, which was already socially accepted, but added formal legitimacy to it. P2 is considered supported: the tax status certificate, the filing receipts, the trademark registration certificate, the resolution granting the seal, and the invoices are consistent with the benefit the participant reported.

Training linked to procedures (P3)

Each training activity was followed by a concrete action within about one week. The business training, which the entrepreneur completed through IHCE's weekly online sessions, had two effects: she began to keep

financial records, albeit informally, and she met the requirement for IHCE to refer her to IMPI, which allowed her to obtain a 90% discount on the trademark registration fee. Tax training on RESICO preceded her registration in that regime by one week; the IMPI training sessions preceded the trademark application by six days; and the training on the seal preceded its application by about one week (Table 3). The case also shows that a single institution can coordinate several forms of support: IHCE trained the entrepreneur, designed her logo, and gave her access to the IMPI discount.

The literature shows that isolated training has modest effects and is applied only in part (McKenzie & Woodruff, 2014); in Tizayuca, 94.4% of respondents considered the courses they had received useful, but only 11.8% applied everything they had learned (Galicia Lagos & Hernández Silva, 2024). In this case, the short interval between learning and applying is consistent with what P3 anticipated, which is considered supported with respect to the expected pattern, since the dated certificates and filing receipts document the sequence. However, the design does not allow a comparison with isolated training, so the advantage of linking training to procedures remains a hypothesis for studies with a comparison group. Table 5 summarizes the assessment of the three propositions.

Table 5: Assessment of the propositions against the case evidence

Proposition	Expected pattern	Observed pattern	Judgment
P1	Lower perceived institutional distance with clear and close interaction	From 0 to 4 linked institutions and 30 interactions, 28 of them remote; municipal link activated; procedures perceived as accessible	Supported
P2	Formalization by degrees, guided by concrete benefits	RESICO registration, trademark application, and seal application; customer recovered through invoicing; trademark and seal obtained, and persistence after 10 months	Supported
P3	Training that immediately translates into a procedure	Each training activity followed by an action within about one week: tax registration, trademark and seal applications, and financial records	Supported, without comparison with isolated training

Note. Prepared by the authors. The judgment applies the decision rule described in the Data Analysis section (Figure 6).

Effectiveness of the intervention

In terms of efficacy, the six planned strategies were implemented and the three formal milestones were achieved: tax regularization within the intervention period and, once the procedures had been completed, trademark registration and the granting of the seal. In terms of efficiency, the direct cost to the entrepreneur was MXN 728.64: MXN 416 for the logo design at IHCE, which was produced through successive proposals until the entrepreneur chose one, and MXN 312.64 for the trademark application, thanks to the 90% discount. At the full fee of MXN 3,126.41, the cost would have been MXN 3,542.41, so the accompaniment reduced the expense by 79.4%. The intervention lasted 53 days, in October and November 2025, and required about 60 hours of institutional work, estimated at an average of two hours for each of the 30 interactions. All actions were part of the regular services of the agency and its affiliated bodies, so they did not require additional resources.

Regarding business results, the participant reported an approximate 30% increase in her income and an increase in orders, in addition to recovering the customer who required invoices. The invoices issued and the financial records she began to keep after the training support the increase in activity after the intervention, but they do not allow a comparison with O_1 because no records existed before. In addition, O_2 coincided with the

product's high sales season, which makes it impossible to separate the effect of the intervention from the seasonal effect. Her entrepreneurial self-assessment rose from 2 to 5 points. The direction of these changes is consistent with the income gap between formal and informal women entrepreneurs reported by IMCO (2021) and with the evidence that personalized accompaniment is associated with substantial business improvements (Bruhn et al., 2018). However, the design does not allow these changes to be attributed to the intervention, and the self-assessment may partly reflect the enthusiasm typical of the end of an accompaniment process.

Persistence of changes after 10 months

At the October 15, 2026, follow-up, the entrepreneur remained in RESICO, held the registered trademark and the granted seal, and was seeking access to sources of financing. She was also receiving invitations to local fairs, which, according to her testimony, help her promote her product. Her interest in financing is relevant: it corresponds to the stage that the intervention left out for lack of time when it prioritized the foundations of formalization. The fact that the entrepreneur has now reached that stage suggests that those foundations played an enabling role. However, other factors come into play over more than 10 months (Shadish et al., 2002), so these results are interpreted as evidence of persistence rather than as an effect of the intervention.

CONCLUSION

This study examined how and to what extent accompaniment based on SEDECO's strategies contributed to strengthening an artisanal mole microenterprise led by a woman in a rural municipality of Hidalgo. Within 72 days, the entrepreneur went from having no link with any institution to being linked with four; she also registered in RESICO and filed the trademark and seal applications, at a direct cost of MXN 728.64, 79.4% less than at full fees. More than 10 months later, both procedures had been concluded favorably, and the business remained formal. All three propositions were considered supported.

The case contributes three ideas to the study of informality. First, perceived institutional distance is not a fixed trait of those who run informal businesses: it can be reduced through close interaction with public servants, even remotely, as the street-level bureaucracy approach anticipates (Lipsky, 2010). Second, formalization advances in steps guided by concrete benefits, which supports the idea of a continuum of formality (Williams & Shahid, 2016). Third, institutional support may exist and still remain latent: the municipal link was available but only became operational when the state agency activated it.

For SEDECO and municipalities, the results suggest three actions: deliberately activating existing municipal links, starting with the procedures that enable subsequent ones (tax registration, commercial identity, and trademark), and linking each training activity to the immediate completion of the corresponding procedure. Since all actions were part of the regular services and most interactions were remote, the model could be replicated in other municipalities without additional resources and offer the channel that, according to Saavedra García et al. (2013), microenterprise support policies have yet to find.

The findings should be read with caution. This is a single, self-selected case without a comparison group, evaluated by the same researcher who implemented the intervention; some results depend on self-report; the postintervention measurement coincided with the high sales season; the follow-up was not part of the original design; and only some of the agency's programs were evaluated. Therefore, generalization is analytical rather than statistical (Yin, 2018). Future research could compare women entrepreneurs with and without accompaniment, extend the follow-up to assess business sustainability, evaluate the financing programs this study left out, and estimate the institutional cost of extending accompaniment to other municipalities.

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participated in the pilot test for their time. Special thanks go to the entrepreneur in the case for her trust and her willingness to share her experience. This study received no specific funding.

Ethical Approval

This study was not submitted to a research ethics committee. It was considered minimal risk because the intervention consisted of services that SEDECO and its affiliated bodies routinely offer to any entrepreneur, with no experimental procedures. The participant was informed of the purpose of the study and gave written informed consent; she authorized the recording of the interviews, the subsequent follow-up, and the publication of the results, and she retained the right to withdraw at any time. To protect her identity, her name, the name of the municipality, the trade name, and the exact dates of public procedures are omitted. Personal data were handled in accordance with the data protection obligations that govern the agency. The pilot test participants gave verbal consent.

Conflict Of Interest

The researcher completed her professional residency at SEDECO's Directorate of Entrepreneurship and Competitiveness Support, whose strategies are evaluated in this study. She received no remuneration or scholarship from the agency, and this relationship is disclosed in the interest of transparency. The authors declare no other conflicts of interest.

Data Availability

The data supporting the findings (interview transcripts, financial records, invoices, and procedure documents) are not publicly available because the participant did not authorize their dissemination and the agency is required to protect citizens' personal data.

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