



QRO
ORGULLO
DE **MX**



SECRETARÍA
DE DESARROLLO
SUSTENTABLE

QUERÉTARO

IS THE WAY

QRO
ORGULLO
DE **MX**



Strategic location

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PODER EJECUTIVO DEL ESTADO DE
QUERÉTARO

MORE THAN
45 MILLION
INHABITANTS
WITHIN A 350 KM RADIUS

Area: 11,688 km²

Weather: 23° C

Pacific Ocean

United States of America

San Luis Potosí

Guanajuato

Querétaro

Hidalgo

State
of
Mexico



Connectivity



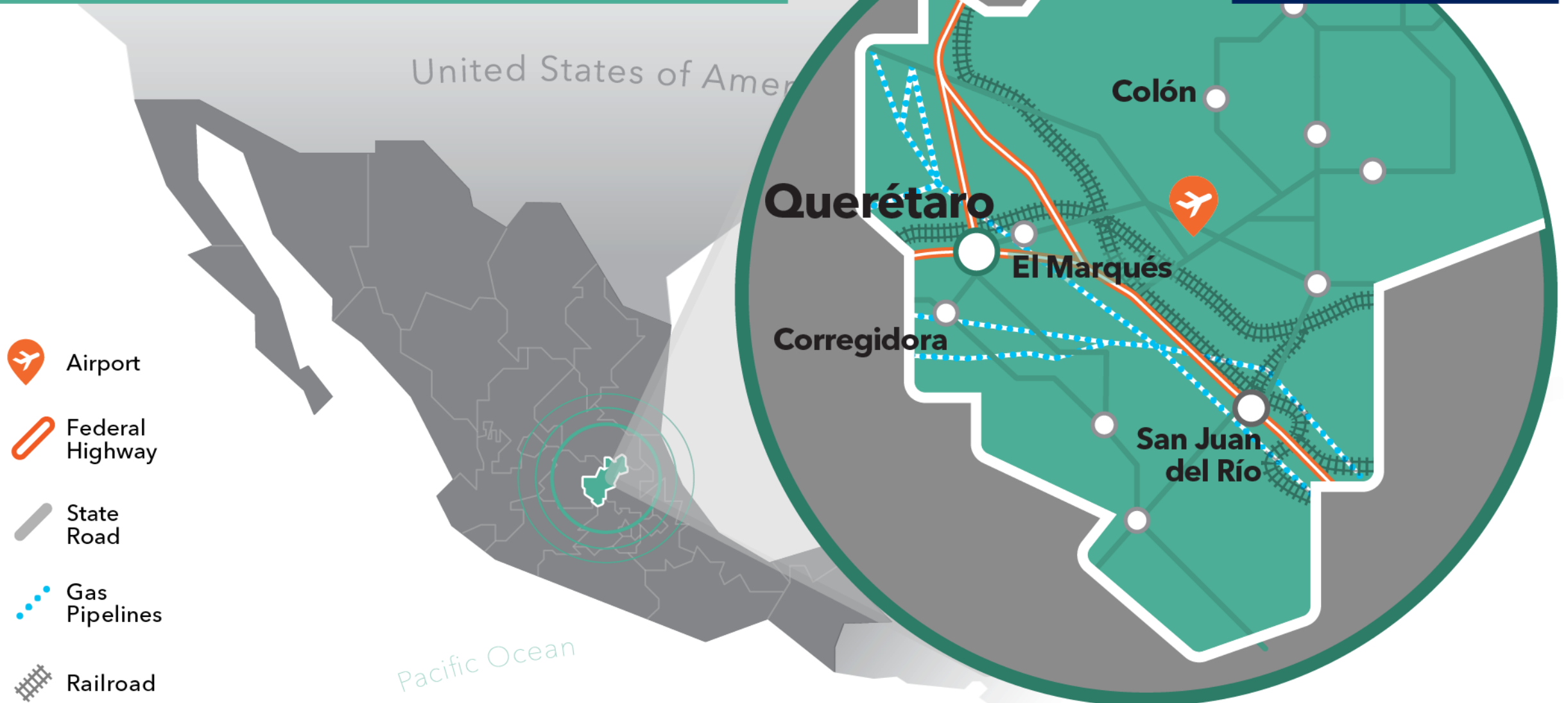
Distances to Atlantic and Pacific Ports

Destination	Km	Mi
Altamira	631	392
Veracruz	607	377
Lázaro Cárdenas	544	338
Manzanillo	650	403
Mexico City	238	147

Distances to the USA border

Destination	Km	Mi
El Paso, Texas	1,630	1,012
San Diego, Cal.	2,600	1,615
Laredo, Texas	940	584

Infrastructure



Demographic Profile

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2.27 m

State Population
(CONAPO, 2019)

28 years

State average age
(CONAPO 2019)

888 k

Economically
Active Population
(CONAPO, 2019)

3.5%

National
Unemployment
Rate (INEGI, 2019)

67 people

Arrive daily to
Querétaro state
(CONAPO, 2019)

4.7%

State
Unemployment
Rate (INEGI, 2019)

International Competitiveness Indicators



mxAA+ STANDARD & POOR'S

First state in country to obtain an investment grade rating.

1st choice KPMG

of companies to invest in Mexico (3rd year in a row)

2nd state

with the lowest public debt (El Economista, 2018).

Aa1.mx MOODY'S INVESTORS SERVICE

Investment level higher than most municipalities in Mexico.

2nd place fDi AMERICAN CITIES OF THE FUTURE

as "Latin American States of the future in Economic Potential Overall" (2018-2019).

5th place fDi AMERICAN CITIES OF THE FUTURE

as "South American States of the future in Business Friendliness Overall" (2018-2019).

Intercontinental Airport



Commercial Airlines



United States of America



Cargo flights

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Cargo Airlines



**Multimodal
Terminal**

**Fiscal
Enclosure**

Public transportation

Transportation Axis

Metropolitan area

- 5 de Febrero
- Revolución
- San Isidro Miranda / Tlacote
- Constituyentes
- Bernardo Quintana
- Av. de la Luz
- Chichimequillas
- Pie de la Cuesta
- Revolución
- Chichimequillas
-  **Industrial Parks**



Rule of Law



1st place

National Ranking of Progress
"Consolidation of the Accusatory
Criminal Justice System"
(Cosmos Model).

Center of Analysis of Public Policies

COSMOS Model

Oral accusatory system that allows to
provide attention to crimes of patrimonial
nature via an electronic tablet.

1st state

with an Anti- Corruption System

Speeds up
the process

Grants
access

To the complaint
at the scene of
events

35%
increase

in receipt of
complaints

74% of the
complaints

raised are
registered in 45
min or less

Tourism



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3 UNESCO

World Heritage Sites:

- Centro histórico
- Misiones Franciscanas
- Camino Real de Tierra Adentro

272

Cultural Venues

Pueblos Mágicos

6 "Magical Towns"

Wine, cheese & art route

25 vineyards

11 cheese factories

Tourism

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2nd

Most visited non-coastal destination in the country

30%

Increase in tourists (2015-2018)

48%

Growth in hotel rooms (2015-2018)

Source: Ministry of Tourism, 2018.

Tourism

11,062
millions of pesos
Economic spill

55%
Belongs to
business tourism

**International
visitors**

#1 U.S.A. **#2** Canada



Leisure

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2

Polo Clubs

12

Country Clubs

452

Hotels

1,380

Restaurants

5

Luxury Malls

10

Golf Courses



Foreign Community

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10,381

Foreign visitors
in Querétaro
in 2016-2017

+15

International
Schools in
Querétaro

**Foreign
Communities
Festival**

Annual participation
of more than 72
countries



+38

Private Institutions
& Hospitals

Public Institutions

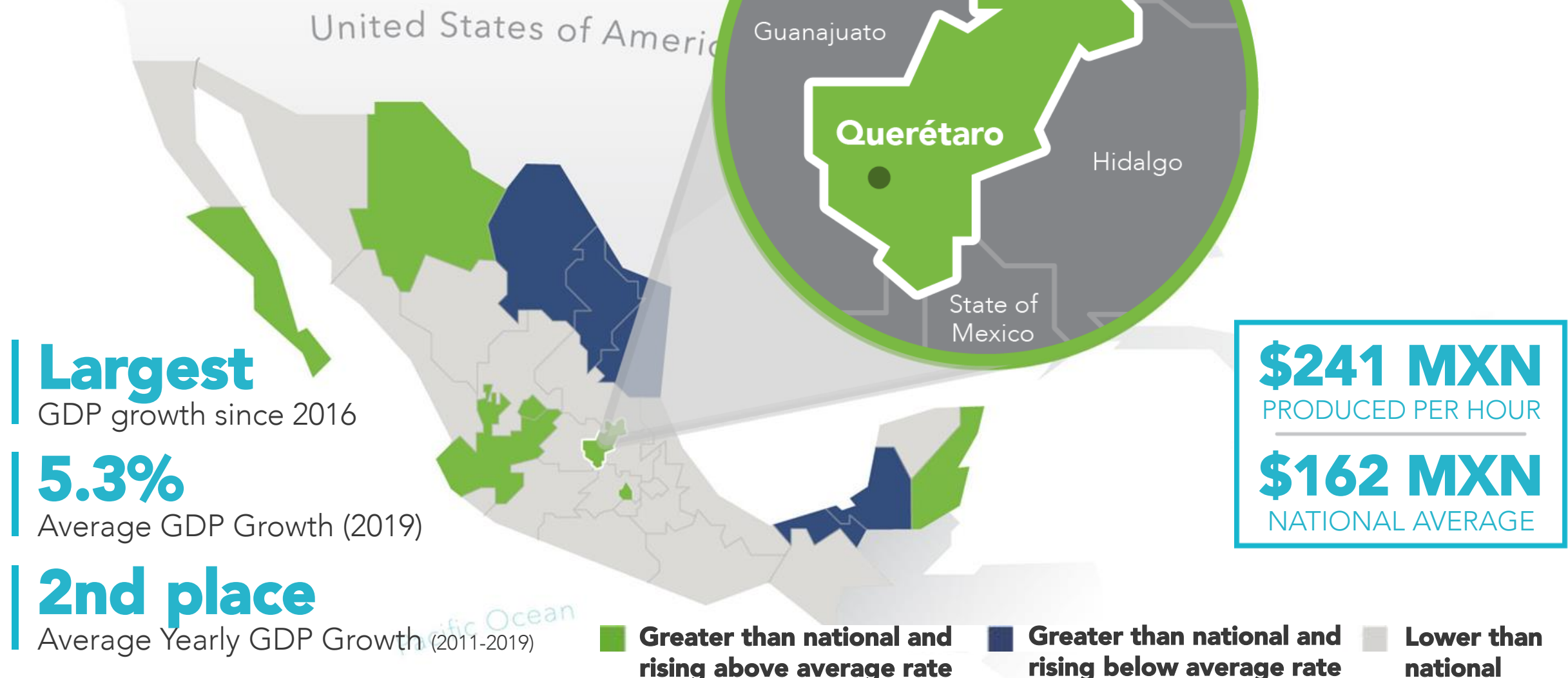
4 General Hospitals
58 Mobile medical units
202 Health Centers

Specialty Centers

1 Specialties Hospital for children and women
1 Oncology Unit
1 Mental Health Center
1 Hemodialysis Unit
1 Blood Transfusion Center
1 Sexually Transmitted Diseases Center

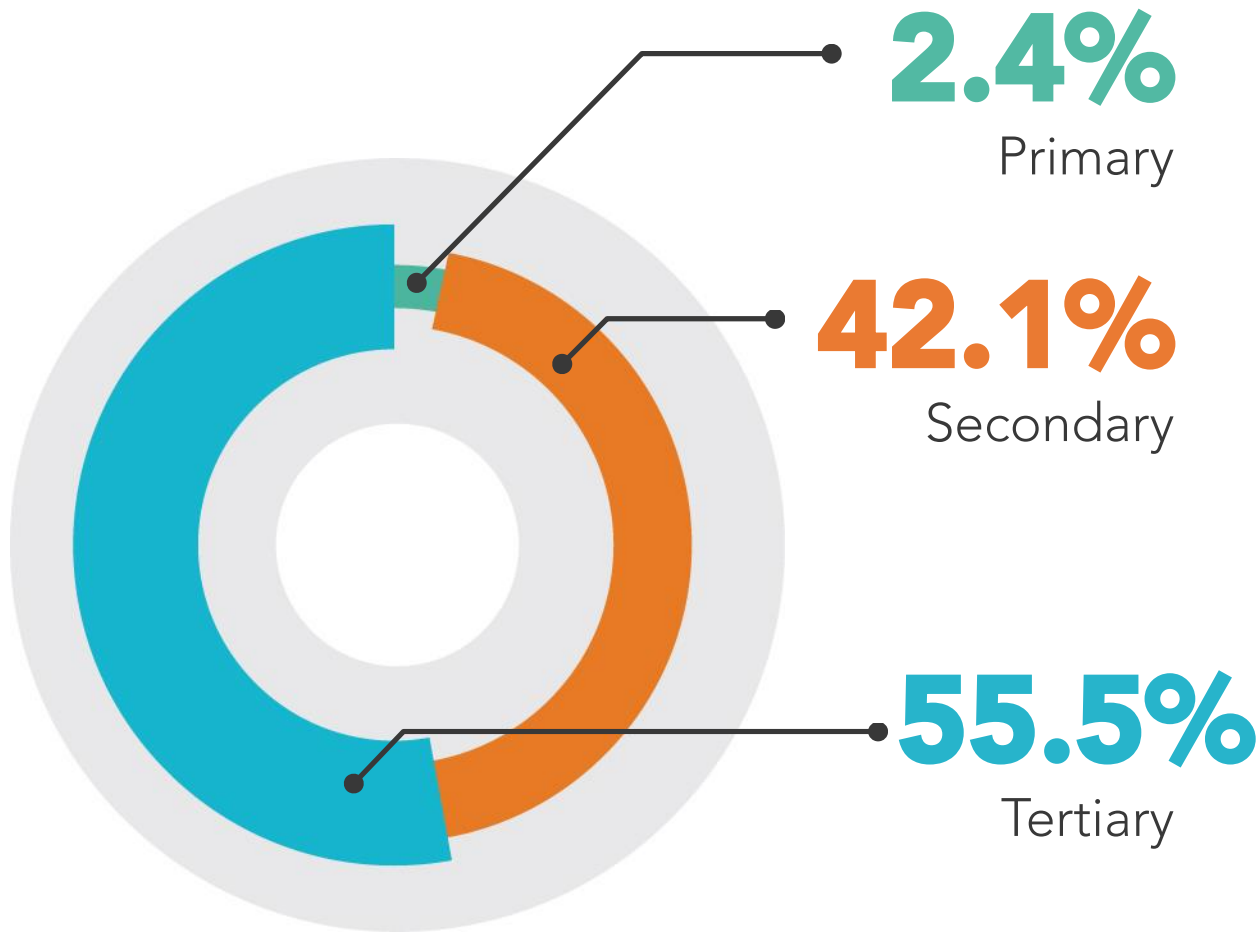
Productivity

Source: INEGI



GDP Distribution

Source: INEGI



0.16%
Mining

1.8%
Agriculture

22%
Manufacturing

2%
Food Industry

1.8%
Electricity,
Water & Gas

10.3%
Construction

6%
Other

21.7%
Trade &
Commerce

8%
Transportation

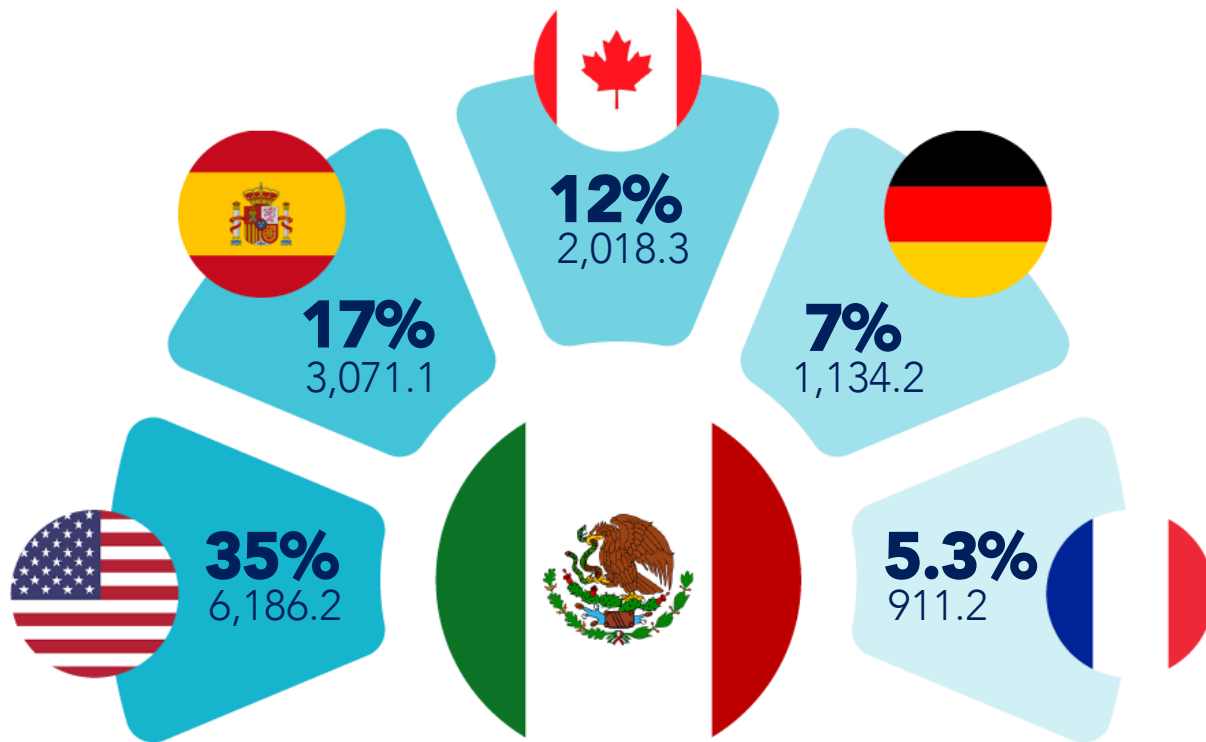
3.8%
Educational
Services

8%
RE Services





14%
Other

Foreign Direct Investment (1999-2019)

Source:SE



Main Partners

Country	Investment MUSD	FDI %
	716.2	4.1%
	560.5	3.2%
	552.6	3.2%
	346.3	2.0%
Others	1,178.3	11.2%

Trade Relations & Intl. Regulations

Source:SE

Pacific Alliance

Population **226 m**
GDP **2,121 bn**
Exports **615 bi**

2.2%
Glbl. GDP
3.4%
Glbl. Trde.

FTA EU - MX

Population **640 m**
GDP **19,974 bn**
Exports **6,732 bi**

22.9%
Glbl. GDP
34.9%
Glbl. Trde.

USMCA

Population **494.8 m**
GDP **24,440 bn**
Exports **2,567 bi**

28%
Glbl. GDP
13.3%
Glbl. Trde.

TIPAT

Population **507.3 m**
GDP **11,262 bn**
Exports **2,964 bi**

12.9%
Glbl. GDP
15.4%
Glbl. Trde.



Access to
1.36 bi
consumers

Trade Relations & Intl. Regulations

Pacific Alliance

FTA EU - MX

USMCA

TIPAT

Competition Law

Antimonopoly Law

Foreign Investment (FDI) Act

Current text regulating FDI in Mexico

Multilateral regional forums

WTO, APEC, OECD, ALADI



13 FTAs

With **46** countries

32 APPRIs

With **33** countries

9 Limited Scope

agreements in ALADI

Queretaro's Industrialization



1940 -1960

- Textile
- Agro Industries
- Food & Beverages

1961-1990

- Metal Mechanics
- Home Appliances
- Chemical
- Rubber & Plastic

1991-2016

- Automotive
- Electric & Electronic
- Aerospace
- IT
- OEM

2017-2021

- IT
- Financial Services
- Renewable Energies



IBM

Visteon

Continental

Deloitte.

brose
Technik für Automobile
R&D

MetLife

VÜHL

ZOHO

HUAWEI

Automotive Industry

Source: SEDESU · INA

104 TR1

Suppliers

+200 TR2

Suppliers

7 OEM

Bus, Tractor, Recreational
& Lightweight Car



34.4%

Share of State
Manufacturing
GDP



5,330

Autopart
Production
(2015)



28.5%

Share of total
State Exports



2,281

Of FDI
(2010-2017)



70k

Jobs

Vehicle Security Experimental Track



2.7 km

Paved track

Mexican Transport Institute

Experimental testing track

Acceleration and break tests

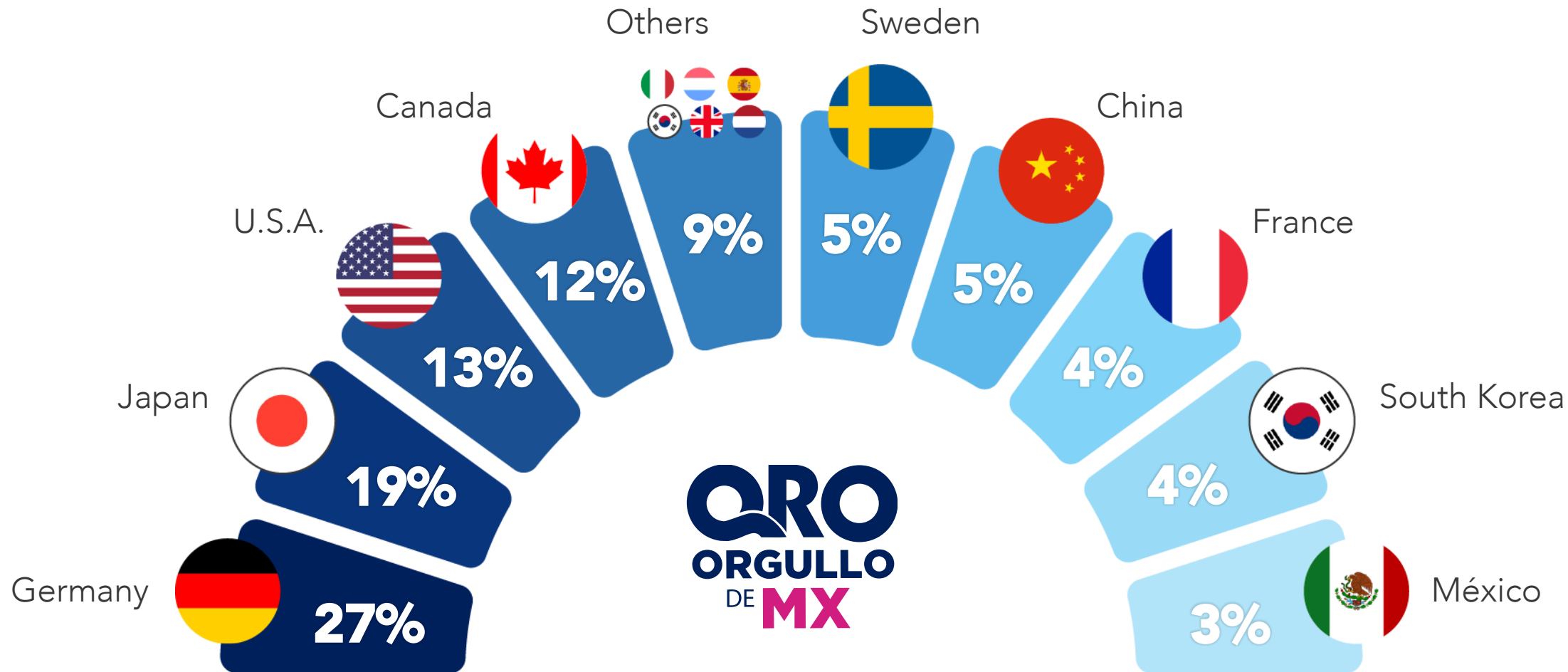
Tire and track testing

Emergency vehicle testing

Stability and noise testing

Automotive FDI in Querétaro 1999-2017

Source: INA



Aerospace Industry

+80
Companies and
support entities

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Source: CAQ

| **2 OEMs**

| **26 TR 1&2**

| **5 MROs**

| **5**

Special Processes

| **4**

Raw Materials

| **19**

General Services

| **12**

Research Centers

| **7**

Academic Institutions

4th Place

“Cities with
the best FDI
performance in the
aerospace sector”

Top 10 (2016-2017)
Financial Times
2017/FDI Magazine



+10k

Employees



37%

Aeronautical
Exports
Nationwide

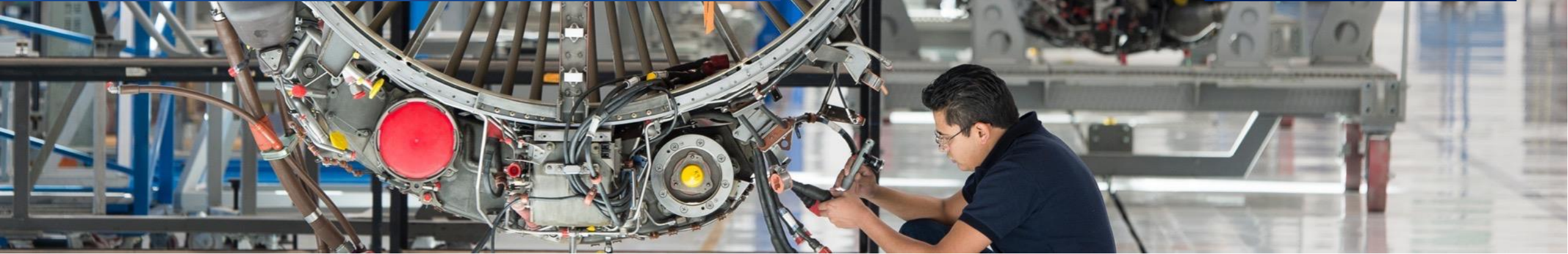


50%

Of Aerospace
FDI in México
Last 10 years

Aerospace Industry

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75 MUSD

FDI increase in Querétaro's aerospace industry.

200% growth

of aerospace companies from 2006 to 2016

Aerospace Industry

72% in manufacturing

13% in research and design

11% in maintenance and repair

04% others

Destinations

North America and Europe are the main export destinations

7k MUSD

in exportations (2006-2016)

Products and Services

Source: CAQ



Aerospace Complex



Source: CAQ



4.0 Industry - Linkage

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ConMad:

Additive Manufacturing Consortium



Engineer and
Industrial
Development
Center
(Centro de Ingeniería
y Desarrollo Industrial)



Advanced
Technology
Center
(Centro de Tecnología
Avanzada)



General
Electric

CIC 4.0:

Creativity and Innovation center 4.0



SIEMENS



Foundation
Mexico – United
States for Science
(Fundación México Estados Unidos para la Ciencia)

4.0 Industry - Companies



**Industrial
Internet**



**Autonomous
vehicles**



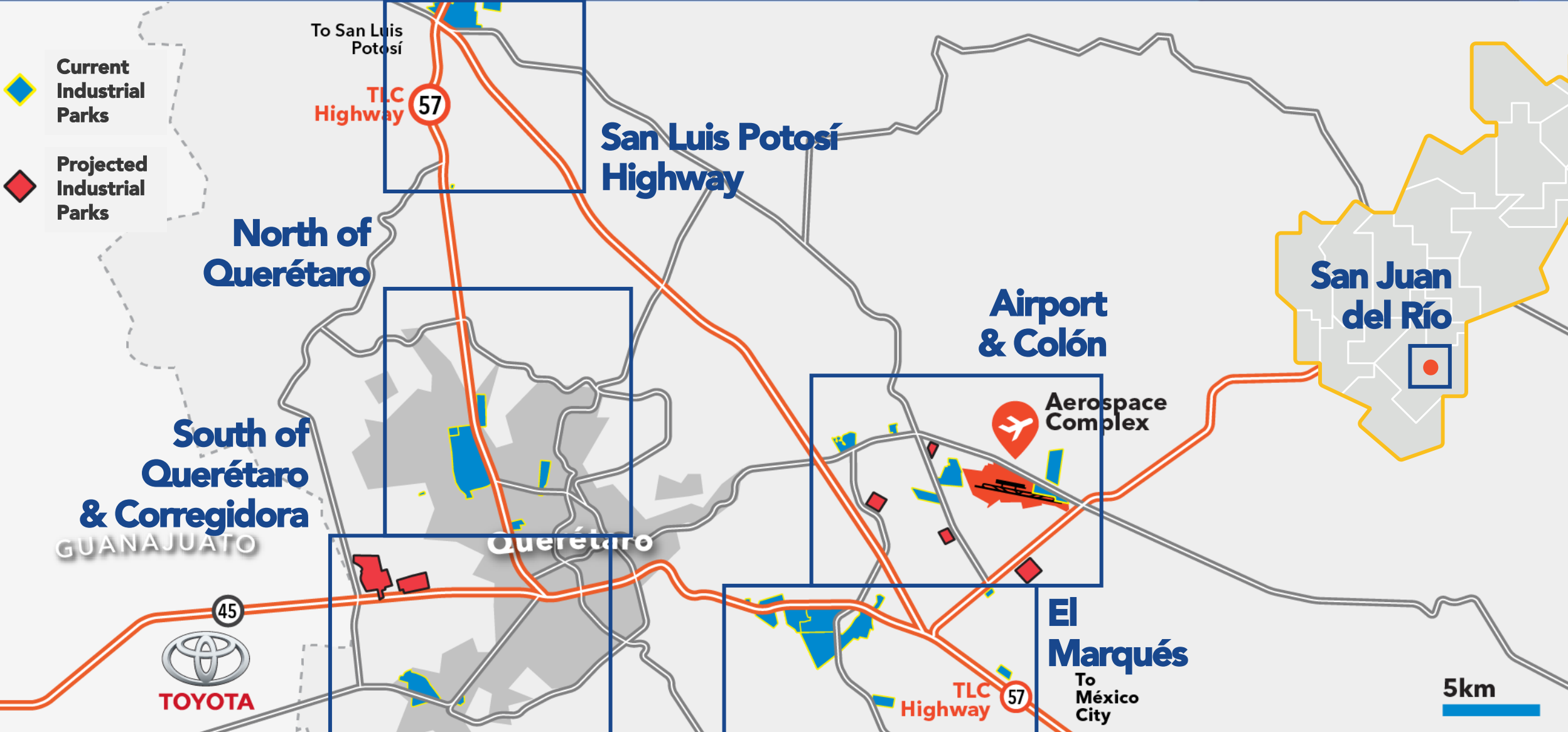
**UNIVERSAL
ROBOTS**

**Robotics Training
Colaborativa
(Cobots)**



**Vehicle
Software**

Industrial Real Estate Zones



Real Estate

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Industrial Park

\$56 - \$100

Land Cost. USD/Sq.m.

\$3.75 - \$5.40

Lease Rate. USD/Sq.m/Month

Triple Net based on a 5 year contract

Greenfield

With Industrial Use of Land

\$26 - \$45

Land Cost. USD/Sq.m.

Labor Force

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Labor Stability

No industrial strikes in the last 25 years

**Labor force focused
on productivity
and high performance**

Training centers

102

Centers

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ICATEQ
INSTITUTO DE CAPACITACIÓN
PARA EL TRABAJO DEL ESTADO DE QUERÉTARO

108
Courses

**Based on German Dual
Educational System**

Some Courses

Electromechanics	English
Industrial Machining	Electronics
Plastic Molding	Automotive Technical Assistance
IT	

Technical High School



2-3

Years

28

Schools

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Source:USEBEO

**High
School**

+

**Technical
Courses**

26,120

Enrolled Students
(2018-2019)

5,112

Graduated
(2018-2019)

Some Courses

Electromechanics

Electronics

Maintenance

Control Systems

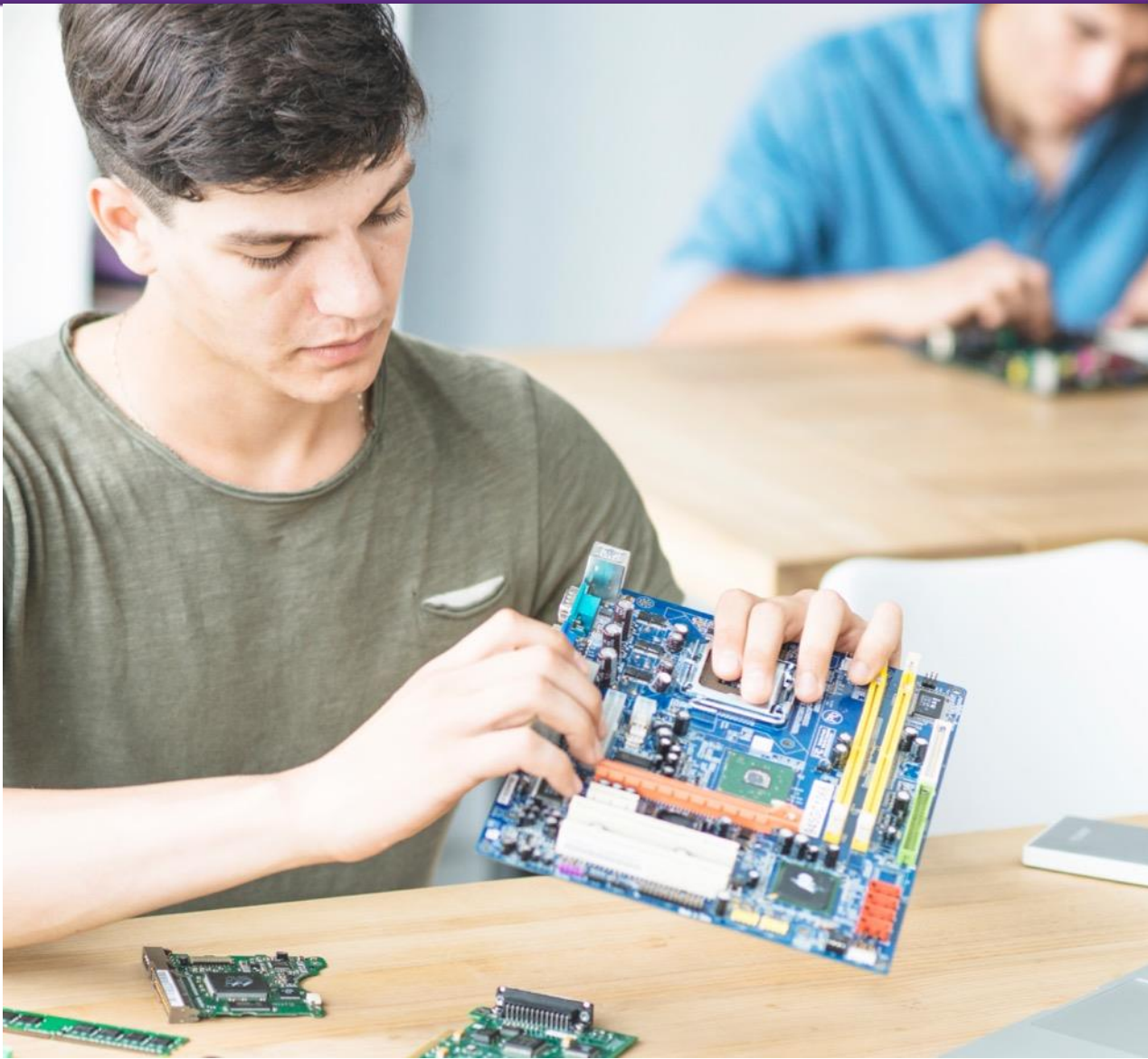
Machining, Tooling

Computer Equipment

Industrial Productivity

Quality Control

Technical University



2-3

Years

13

Schools

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Source:USEBEO

Technical Career

Flexible programs according to industry needs

6,910

Enrolled Students
(2018-2019)

3,220

Graduated
(2018-2019)

Students by area

- 69% Engineering & Tech
- 28% Administration & Social Sciences
- 3% Others

Higher Education



4-5

Years

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Source:USEBEO

74

Higher
Education
Institutions

77k Enrolled
(2018-2019)

15k Graduated
(2018-2019)

39

Institutions
with Graduate
Programs

5.8k Enrolled
(2018-2019)

1.8k Graduated
(2018-2019)

Students by area

- 44% Administration & Social Sciences
- 34% Engineering & Tech
- 13% Education & Humanities
- 9% Health

+8k

Graduates
since 2006

French - Mexican Campus

The new infrastructure will upgrade the quality and reliability of the training to International standards and has the recognition from the French Government in Mexico.

Degrees

Technical Training Programs for Manufacturing	2-8 months
Upper Level Technician *DGAC	2 years
Engineering	4 years
Graduate Programs (Master)	2-3 years



**3 years
4 months**

Program duration

CIDESI

Center of Innovation &
Automotive Development

Dual training laboratory
in conjunction with Brose

Courses

Technologies for Manufacturing Engineering

Mechatronic Engineering

Computer Systems Engineering

Automotive Engineering



Creativity and Innovation Center 4.0



Programs
100%
Focused on engineering

+20k
Graduated students

7k
Enrolled Students

Strategic Alliances



Industry 4.0

Industry Solutions Center 4.0

Reverse Engineering

Additive Manufacturing

3D Printing

CAD CAM CAE PLM Center

IoT Lab

Embedded Systems

Artificial Intelligence Lab



| **Bilingual**
| **International**
| **Inclusive**
| **Sustainable**

Programs

Software Engineering

Animation & Visual Effects Engineering

Automotive Systems Engineering

Industrial Metrology Engineering

Physical Therapy

R&D Centers



53

Public & Private
R&D Centers



brose

Continental 

mabe



CONDUMEX

TREMEC

Triple Helix Model

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Clusters



| **Automotive Cluster**



| **Aerospace Cluster**



| **Logistics Cluster**



| **Plastics Cluster**



| **IT Cluster**



| **Medical Cluster**

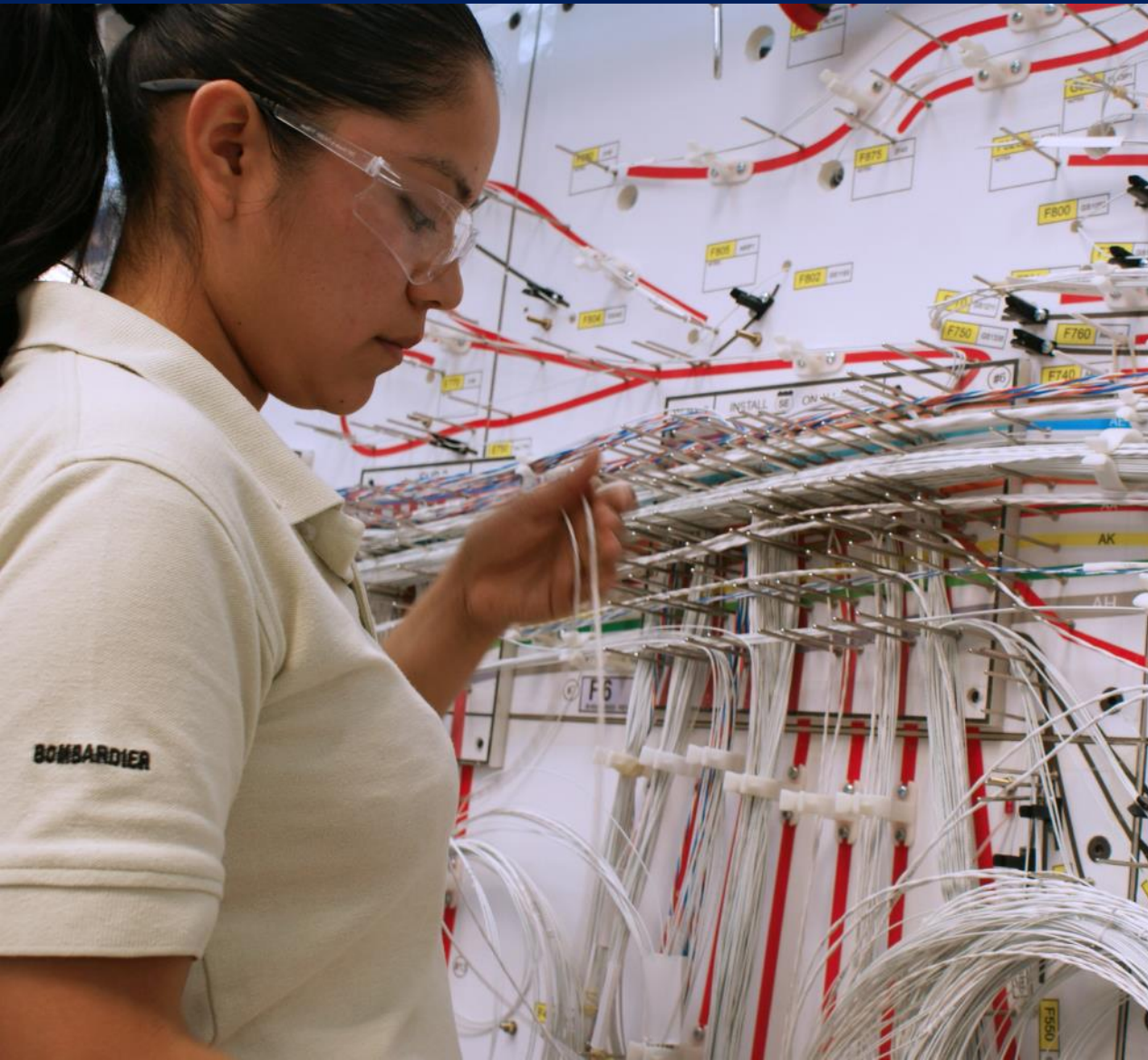


| **Energy Cluster**





Triple Helix Success Stories



+

BOMBARDIER
the evolution of mobility

+





Triple Helix Success Stories



+

brose

Technik für Automobile

+



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DE QUERÉTARO



Triple Helix Success Stories



PODER EJECUTIVO DEL ESTADO DE
QUERÉTARO



SAFRAN
AEROSPACE · DEFENCE · SECURITY



UNQ
Universidad
Aeronáutica en Querétaro



Triple Helix Success Stories



Continental





Triple Helix Success Stories



PODER EJECUTIVO DEL ESTADO DE QUERÉTARO

+

-

VUHL

+





Triple Helix Success Stories



+

Deloitte.

+

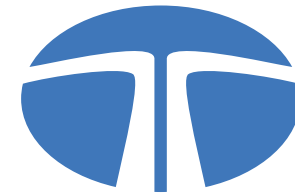




Triple Helix Success Stories



+



TATA

+



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Triple Helix Success Stories



**Querétaro
is the way**



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QUERÉTARO

SECRETARÍA
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