



QRO
ORGULLO
DE **MX**



PODER EJECUTIVO DEL ESTADO DE
QUERÉTARO

SECRETARÍA
DE DESARROLLO
SUSTENTABLE

QUERÉTARO

IS THE WAY

QRO
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DE **MX**



Strategic Location

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**MORE THAN
45 MILLION
INHABITANTS**
WITHIN A 350 KM RADIUS

Area: 11,688 km²

Weather: 23° C

Pacific Ocean

United States of America

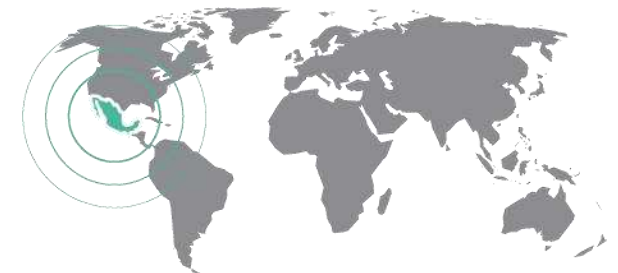
San Luis Potosí

Guanajuato

Querétaro

Hidalgo

State of
Mexico



Connectivity



Distances to Atlantic and Pacific Ports

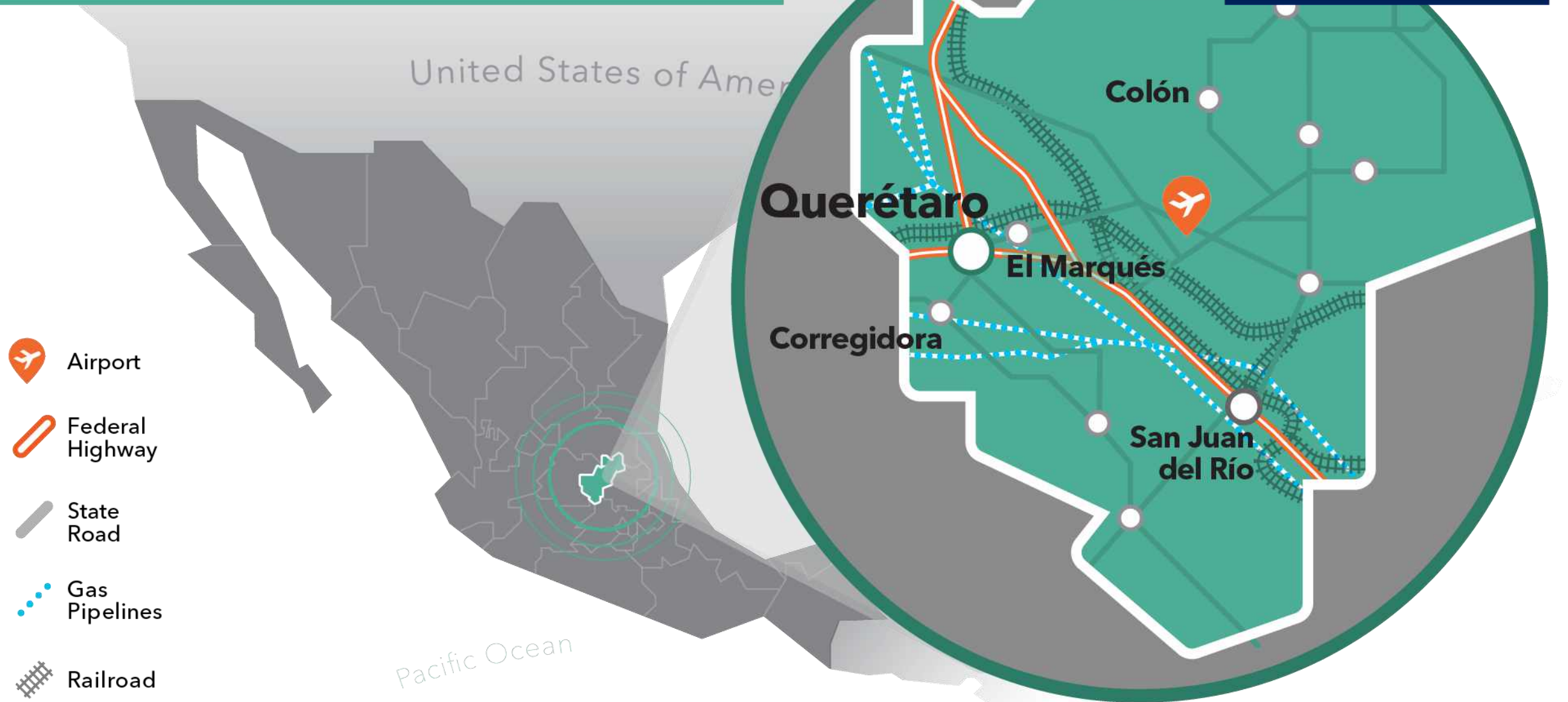
Destination	Km	Mi
Altamira	631	392
Veracruz	607	377
Lázaro Cárdenas	544	338
Manzanillo	650	403
Mexico City	238	147

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

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Demographic Profile



2.09 m

State Population

27 years

State average age
(CONAPO)

869 k

Economically
Active Population

3.5%

National
Unemployment
Rate (INEGI, 2019)

67 people

Arrive daily to
Queretaro state
(CONAPO)

3.2%

State
Unemployment
Rate (INEGI, 2019)

International Competitiveness Indicators



mxAA+

STANDARD
&POOR'S

First state in country to obtain an investment grade rating.

1st choice



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



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

5th place



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

Intercontinental Airport

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Commercial Airlines



AEROMEXICO



volaris

American Airlines



UNITED

TAR
Aerolíneas



DELTA

VIVA
aerobus



Cargo Flights

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Cargo Airlines

FedEx
Express

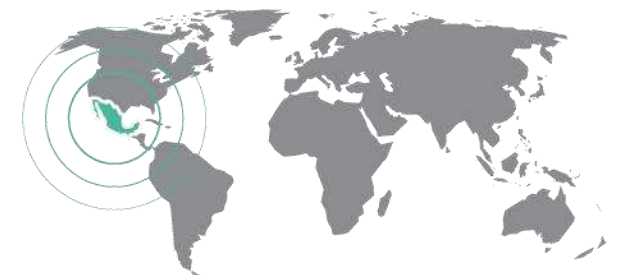


MCS
AREO CARGA



SENATOR
INTERNATIONAL

PANALPINA



Los Angeles

Cincinnati

Huntsville

Memphis

Frankfurt

Hamburg

Luxembourg

Hermosillo

La Paz

Mazatlán

Monterrey

Cancún

Querétaro

Toluca

Villahermosa

**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

COSMOS

Accomplishments



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 a maximum time of 45 min.

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

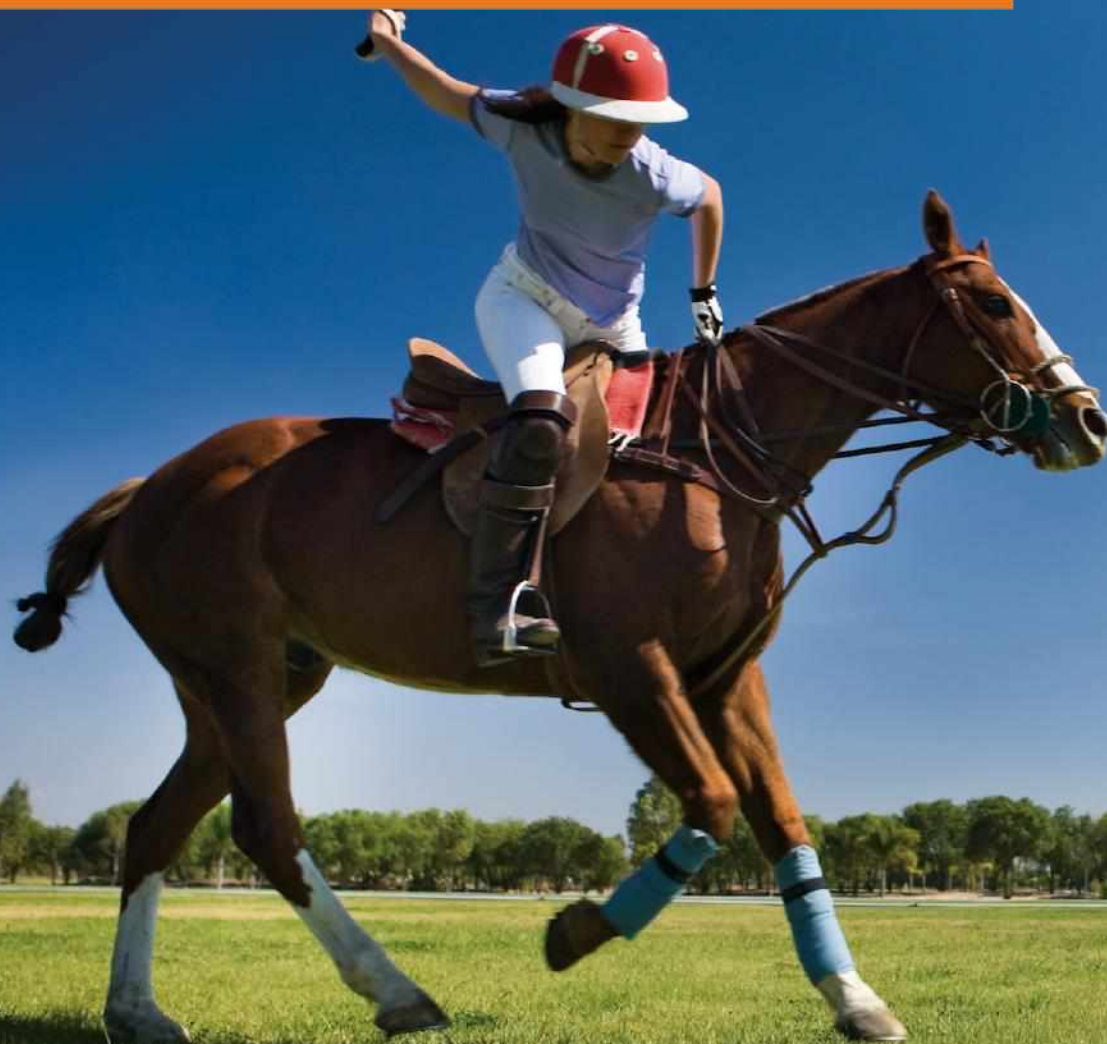
**International
visitors**

#1 U.S.A. #2 Canada



Source: Ministry of Tourism, 2018.

Leisure



| **2**
Polo Clubs

| **12**
Country Clubs

| **452**
Hotels

| **1,380**
Restaurants

| **5**
Luxury Malls

| **10**
Golf Courses

Healthcare

+38

Private
Institutions

Public Institutions

4 General Hospitals
58 Mobile medical units
202 Health Centers

Specialty Centers

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

Foreign Community



10,381

Foreign visitors
in Querétaro
in 2016-2017

+15

International
Schools in
Querétaro

**Foreign
Communities
Festival**

Annual participation
of more than 72
countries

Productivity

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United States of America

Guanajuato

San Luis Potosí

Hidalgo

State of Mexico

Querétaro

Largest

GDP growth in 2016

5.7%

Average GDP Growth (2016)

2nd place

Average Yearly GDP Growth (2011-2016)

\$230 MXN
PRODUCED PER HOUR

\$161 MXN
NATIONAL AVERAGE

Greater than national and
rising above average rate

Greater than national and
rising below average rate

Lower than
national

GDP Distribution

2.3%
Primary

44.8%
Secondary

53%
Tertiary

1%
Mining

2%
Agriculture

18%
Manufacturing

2%
Food Industry

6%
Electricity,
Water & Gas

12%
Construction

6%
Other

20%
Trade &
Commerce

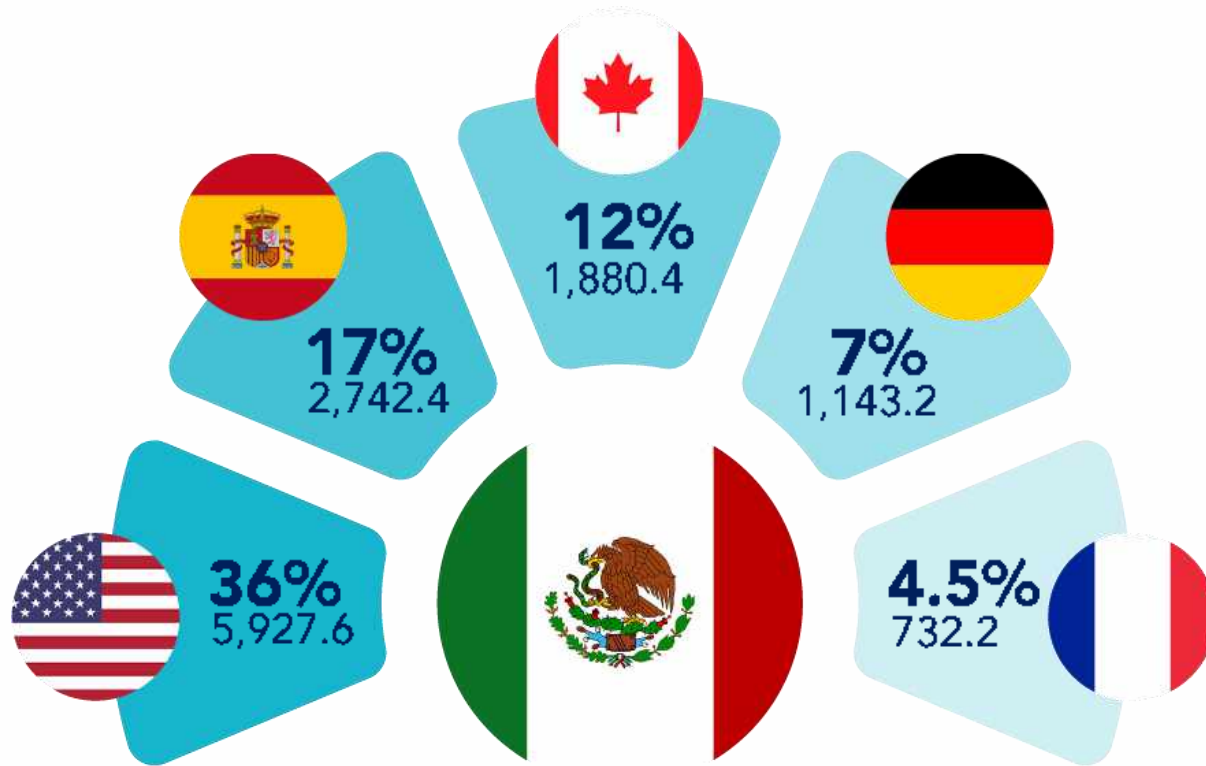
8%
Transportation

3%
Educational
Services





8%
RE Services

14%
Other

Foreign Direct Investment 1999-2019



Main Partners

Country	Investment MUSD	FDI %
	692.2	4.2%
	554.5	3.4%
	535.6	3.3%
	332.3	2.0%
Others	1,783.3	10.9%

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



Automotive Industry



104 TR1

Suppliers

+200 TR2

Suppliers



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

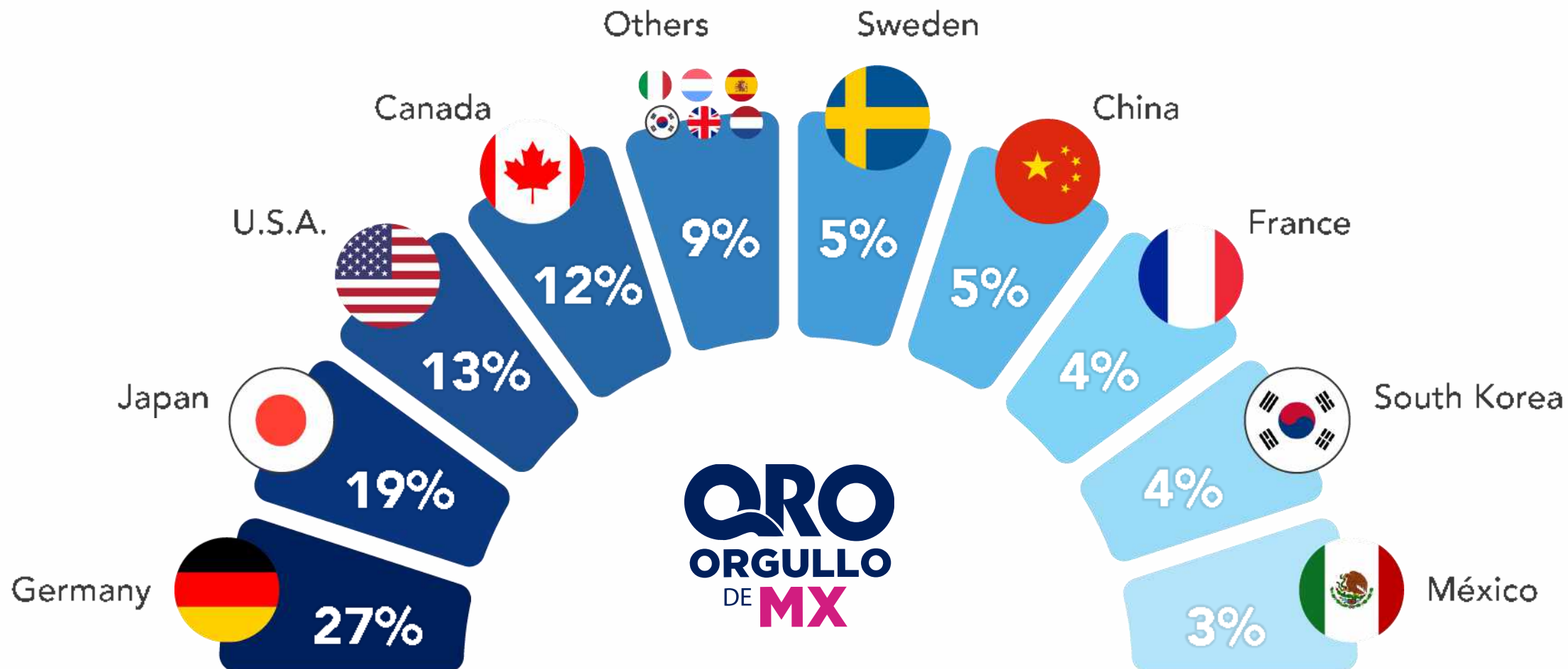
| Acceleration
and break
tests

| Tire and
track
testing

| Emergency
vehicle
testing

| Stability
and noise
testing

Automotive FDI in Querétaro (1999-2017)



Aerospace Industry

+80
Companies and
support entities



| **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



Thermal
Treatments



Superficial
Treatments



Machining of Complex
Components



Composite
Materials



Engine
Components



Aerostructure



Landing
Gear Components



Braking
System Components



Electric Harnesses



MRO Landing
Gear



Engine MRO



Aircraft
MRO

4.0 Industry - Linkage



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**



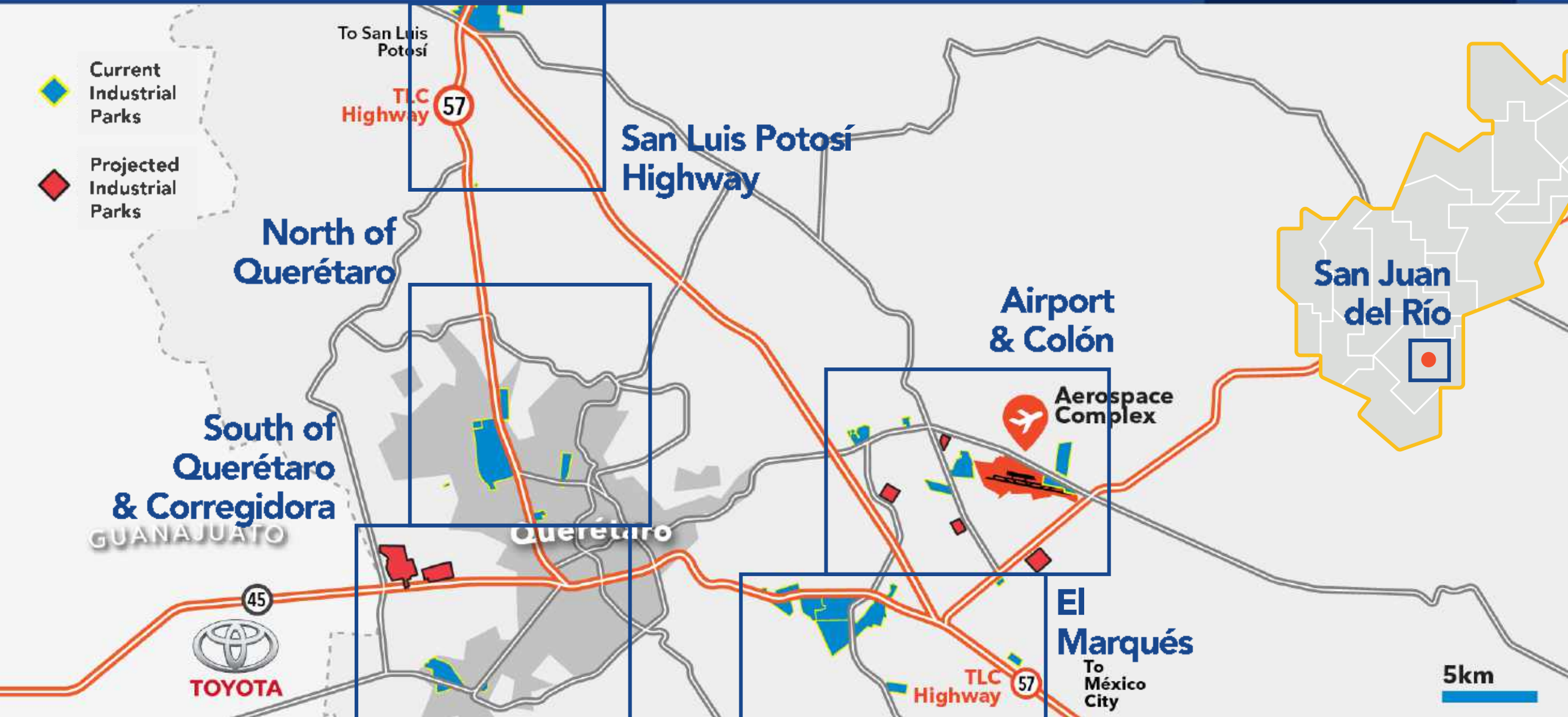
**UNIVERSAL
ROBOTS**

**Robotics Training
Colaborative
(Cobots)**



**Vehicle
Software**

Industrial Real Estate Zones



Real Estate

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\$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



Labor Stability

No industrial strikes in the last 24 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:USEBEQ

**High
School**

+

**Technical
Courses**

26,103

Enrolled Students
(2017-2018)

5,107

Graduated
(2017-2018)

Some Courses

Electromechanics

Maintenance

Machining, Tooling

Industrial Productivity

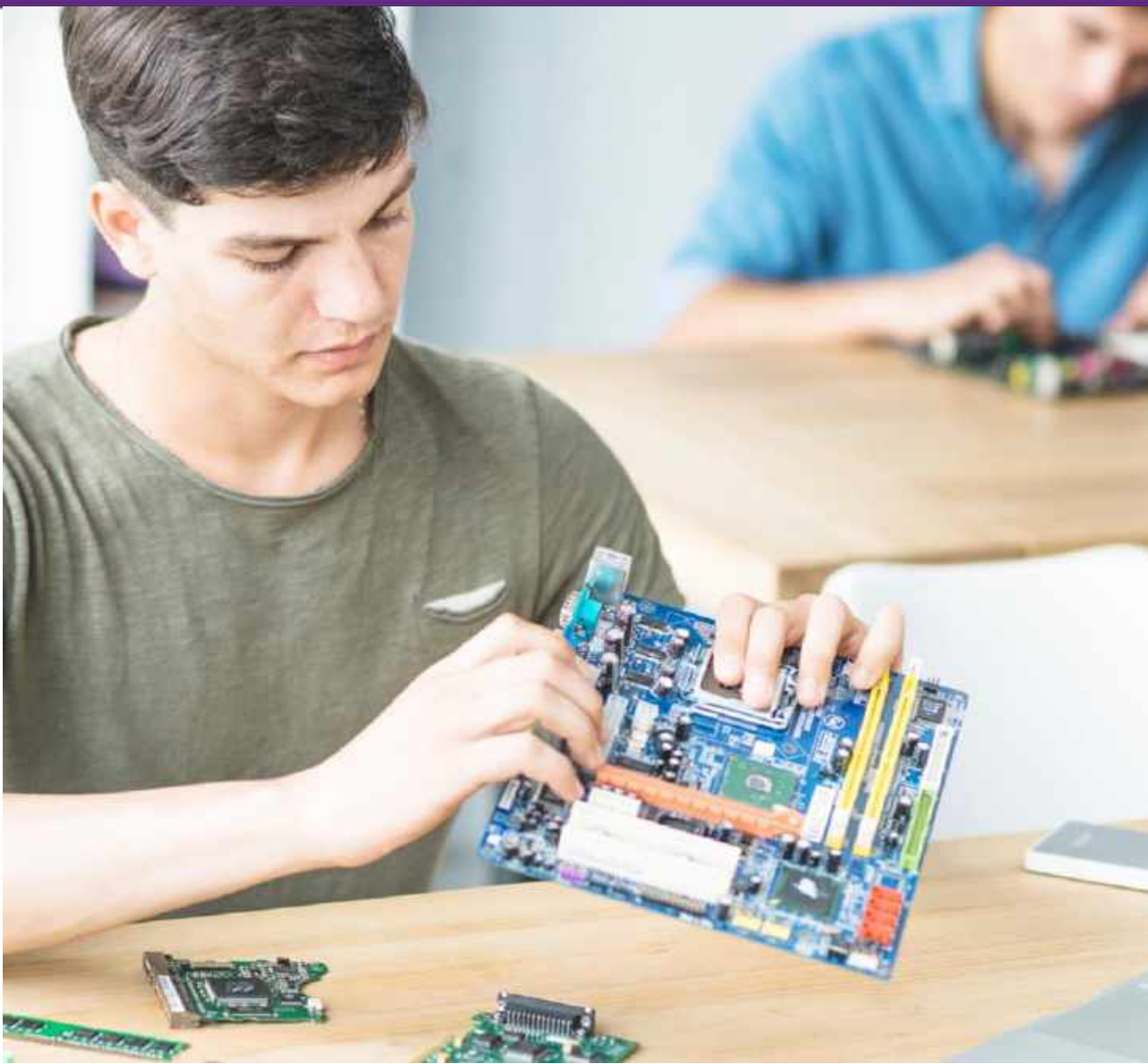
Electronics

Control Systems

Computer Equipment

Quality Control

Technical University



2-3

Years

13

Schools

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Source:USEBEQ

Technical Career

Flexible programs according to industry needs

6,824

Enrolled Students
(2017-2018)

3,107

Graduated
(2017-2018)

Students by area

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

Higher Education



4-5
Years

QRO
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Source:USEBEQ

74

Higher
Education
Institutions

78k Enrolled
(2017-2018)

14k Graduated
(2017-2018)

39

Institutions
with Graduate
Programs

5.7k Enrolled
(2017-2018)

1.7k Graduated
(2017-2018)

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

6.8k

Enrolled
Students

Strategic Alliances



SIEMENS



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

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brose

Continental 

mabe



TREMEC

Triple Helix Model





Clusters



Automotive Cluster



Aerospace Cluster



Logistics Cluster



Plastics Cluster



IT Cluster



Medical Cluster

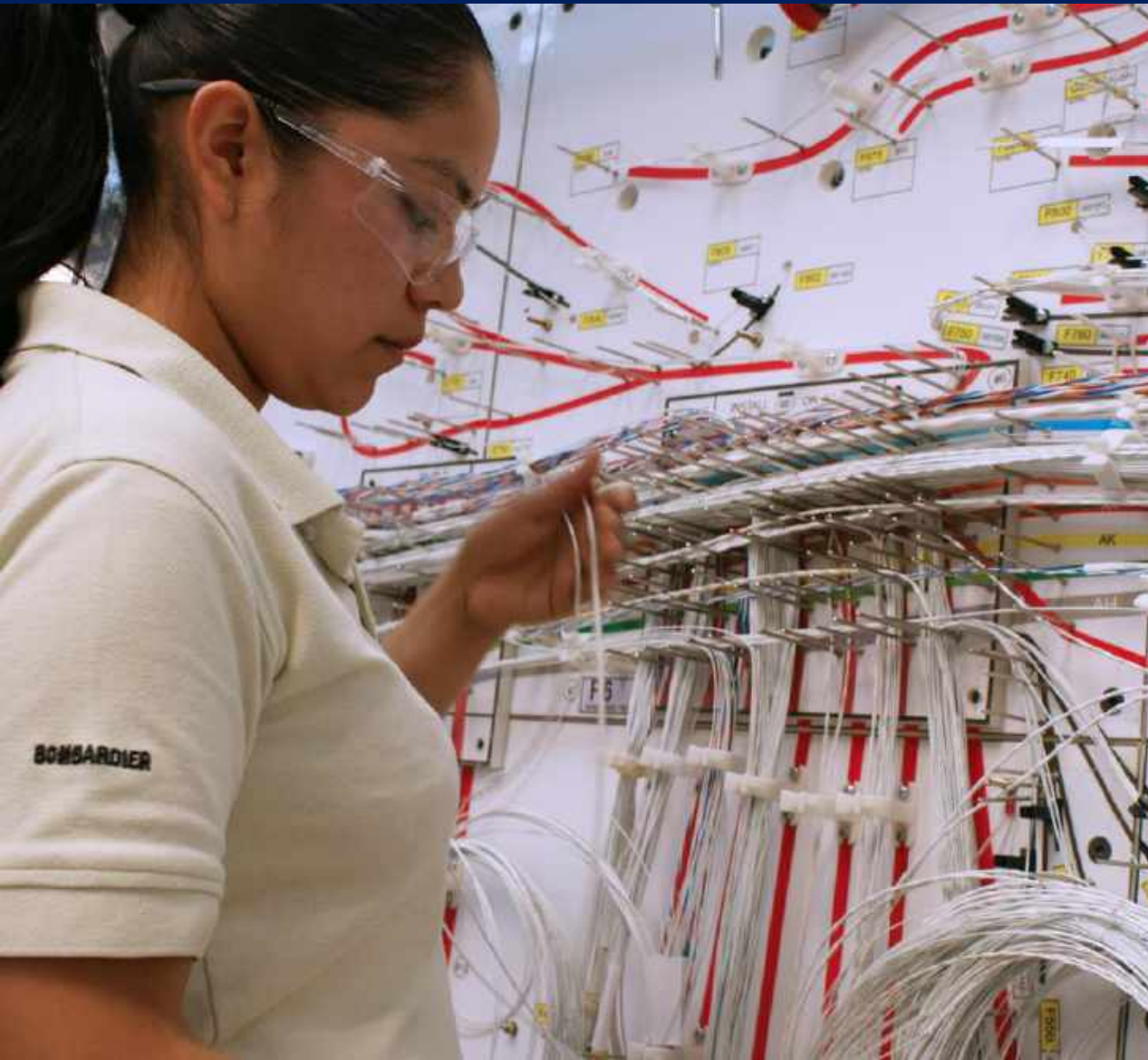


Energy Cluster





Triple Helix Success Stories



+

BOMBARDIER
the evolution of mobility

+





Triple Helix Success Stories



+

brose
Technik für Automobile

+





Triple Helix Success Stories



+



SAFRAN
AEROSPACE · DEFENCE · SECURITY

+





Triple Helix Success Stories



Photo by Tesla Copyrights Reserved



+

Continental 

+





Triple Helix Success Stories



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+

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VUHL

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Triple Helix Success Stories



+

Deloitte.

+





Triple Helix Success Stories



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TATA

+



UNIVERSIDAD POLITÉCNICA
DE QUERÉTARO

Triple Helix Success Stories



+



+



**Querétaro is
the way**



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