



# 2021

ECONOMIC YEARBOOK

## COMPETITIVE QUERÉTARO





# PRESENTATION



The current health situation has forced us all, society, business and government, to change our behavior, to focus our attention on different priorities, to be flexible, adaptable and supportive in an uncertain environment, and at an unprecedented pace.

But it has also forced us to evolve; in Querétaro we are certain that the work we have done since October 2015 has led us along the right path to face these challenges in a proactive manner, and to resume our rhythm of development and growth thanks to our greatest strength: our human resource, which is highly skilled, creative and committed towards coordinated work in each of our economic sectors.

The positive and proactive participation of Queretaro's population makes it possible for the state to remain strong and innovative, focused on its vocation to facilitate and improve the economic activity of small and large entrepreneurs, resulting in a great dynamism that creates opportunities.

Even throughout these difficult times, the entity stands out for its leadership in fundamental areas such as competitiveness; a result of the resilience and productivity of its people, who undertake a major role in the economic, political and social activity every day.

Today, Querétaro is on the right path, a path defined by the organized collaboration of the industrial, academic, scientific and government sectors, which contribute to economic development with measurable data, results and continuous improvement.

As never before, in this historic moment that we are facing, it is of utmost importance to have tools that allow us to observe our economic outlook with useful, representative and objective information in order to drive us to continue working for a prosperous and competitive Querétaro, with national and international leadership.

As is customary, the Executive Power of the State of Querétaro, through the Ministry of Sustainable Development, presents with great enthusiasm the **Economic Yearbook "Competitive Querétaro"** in its 2021 edition, providing reliable information for decision-making, the creation of opportunities and public policies for the benefit of the state.

The result of the contribution of public and private agencies, the Yearbook is undoubtedly a copy that has valuable information and will remain as an obligatory reference for those who, in the future, study this page of history of which we are the protagonists.

The task at hand is permanent: to consolidate Querétaro as the pride of Mexico!

**Francisco Domínguez Servién**  
Constitutional Governor of the State of Querétaro



# PRESENTATION

In face of the public health emergency derived from the pandemic from the SARS-CoV2 virus (COVID-19), in Querétaro we have learned to adapt to the circumstances; the paradigm shift that arises for companies and for society leads us to explore new opportunities for innovation, the reconversion of processes and entrepreneurship.

Our state is undoubtedly recognized for having resilient, enterprising, committed and hard-working people who drive Querétaro to maintain the highest standards, standing out at a national level.

We know that Querétaro stands out for being innovative, solid and flexible in the face of adversities such as these times of pandemic, where the economic reactivation of the state through the coordinated work of each of its economic sectors has been fruitful, generating conditions to help resume the previous rhythm of growth and job creation.

In times of COVID-19, it is of utmost importance to have tools that show hard data to support decision-making, the Executive Power of the State, through the Ministry of Sustainable Development, joins efforts with the bodies generating information at the three government levels, and with the private sector, in order to create the Economic Yearbook, "Competitive Querétaro" in its 2021 edition.

It is a pleasure to put this compilation of the relevant aspects of Querétaro's economic life at your disposal, which supports the analysis of decision-makers to promote investment, employment, competitiveness and, as a result, the quality of life in the state.

**Marco A. Del Prete T.**

Secretary of Sustainable Development  
Executive Power of the State of Querétaro.





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## AEE | 2021

### Competitive Querétaro

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## ENVIRONMENT

It is extremely important to consider Querétaro's resources and the economic activities that sustain it. The objective is for the people to identify themselves with the elements that are part of the region so that they can take action in solving its ecological issues, both as individuals and as a society.

This chapter offers an overview of the potential and virtues of Querétaro's environment and environmental management. Geographical and sociodemographic data are presented to contextualize the situation of its territory.

SUSTAINABLE  
QUERÉTARO

18 MUNICIPALITIES

0.6% OF THE TOTAL SURFACE  
AREA OF THE COUNTRY11,690.58 km<sup>2</sup>  
STATE SURFACE AREA9 DIFFERENT  
TYPES & SUBTYPES  
OF CLIMATESINHABITANTS  
IN THE ENTITY  
2,368,467  
ACCORDING TO THE 2020 POPULATION CENSUSWOMEN  
1,211,647  
MEN  
1,156,820

1,530,820 PEOPLE LIVE IN THE METROPOLITAN AREA OF QUERÉTARO

769,179  
MOTOR VEHICLES  
IN CIRCULATION51 PUBLIC  
WATER  
TREATMENT  
PLANTS412 ENVIRONMENTAL  
UGA MANAGEMENT  
UNITS13 ECOLOGICAL MANAGEMENT  
PROGRAMS (POEL)  
IN FORCE IN DIFFERENT MUNICIPALITIESPROTECTED  
NATURAL AREAS (ANP) 15802.2 MILLION  
DOLLARS  
INCOMING REMITTANCES31,383  
PEOPLE WHO SPEAK  
INDIGENOUS LANGUAGES



# 1.1. Geography

## 1.1.1. Geographical location and territorial division

Mexico ranks 5<sup>th</sup> place regarding territorial extension in the continent, and it consists of 32 states.

EXTREME LATITUDES

**32° 43' 06"** North  
To the North At Monument 206, on the border with the United States of America.

**14° 32' 27"** North  
To the South At the outlet of the Suchiate River, on the border with the Republic of Guatemala.

EXTREME LONGITUDES

**86° 42' 36"** West  
To the East At the extreme southeast of Isla Mujeres.

**118° 27' 24"** West  
To the West At Punta Roca Elefante on Guadalupe Island.



United States of Mexico  
Territorial division by federative entity.

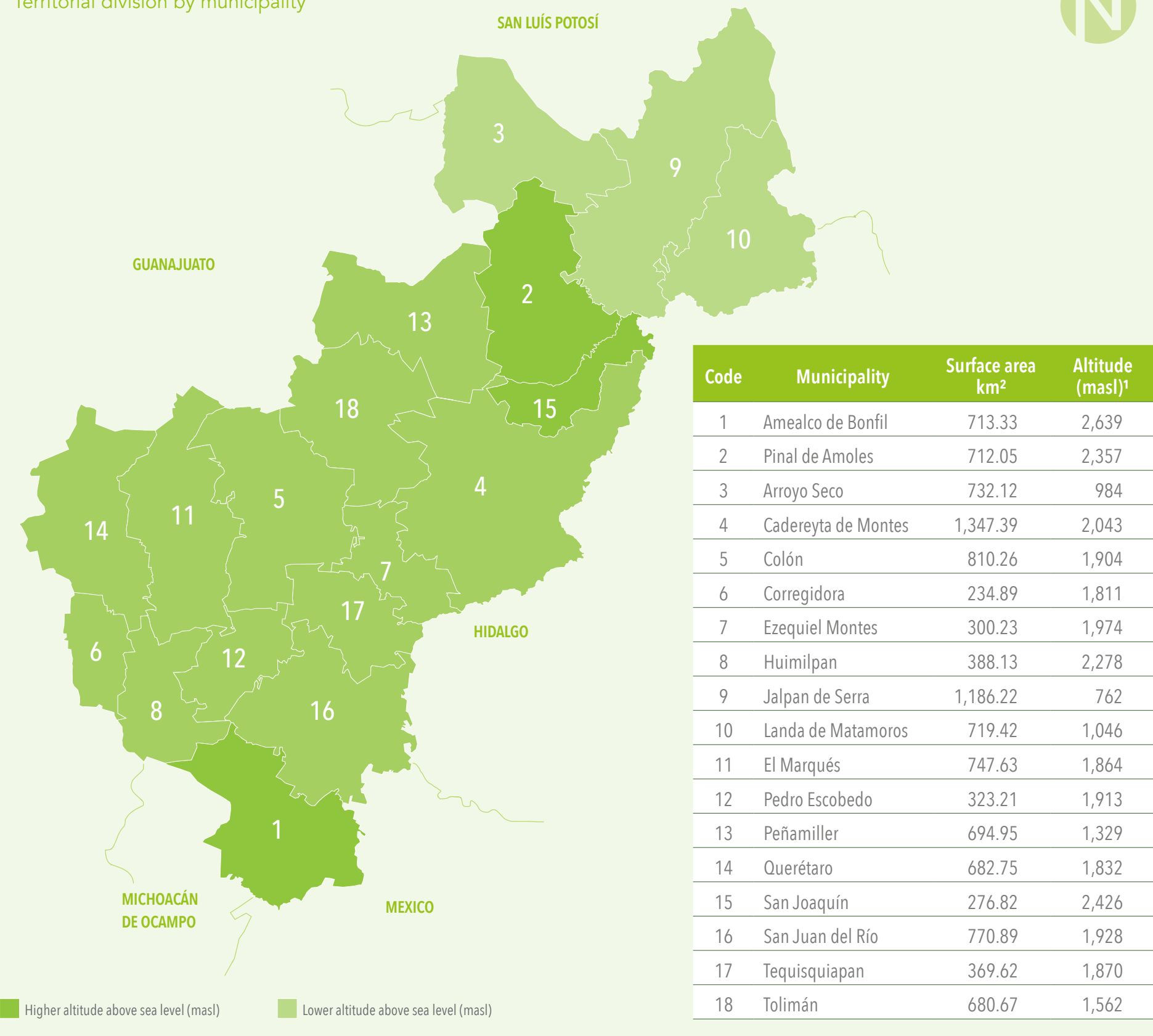
01	Aguascalientes
02	Baja California
03	Baja California Sur
04	Campeche
05	Chiapas
06	Chihuahua
07	Mexico City
08	Coahuila de Zaragoza
09	Colima
10	Durango
11	Guanajuato
12	Guerrero
13	Hidalgo
14	Jalisco
15	Mexico
16	Michoacán de Ocampo
17	Morelos
18	Nayarit
19	Nuevo León
20	Oaxaca
21	Puebla
22	Querétaro
23	Quintana Roo
24	San Luis Potosí
25	Sinaloa
26	Sonora
27	Tabasco
28	Tamaulipas
29	Tlaxcala
30	Veracruz de Ignacio de la Llave
31	Yucatán
32	Zacatecas

Source: INEGI, 2020 Statistical and Geographic Yearbook by State.  
General Management of Geography and Environment. Continental and Insular Surface of the National Territory, 1998.  
SRE. International Boundary and Water Commission.



# State of Querétaro

Territorial division by municipality



Sources: National Statistics and Geography Institute. Unique Code Catalog for the Geostatistical Areas of States, Municipalities and Localities.

## Geographic location

The entity is located at the center of the national territory. It borders with the State of Mexico, San Luis Potosí, Michoacán, Hidalgo and Guanajuato.

Its coordinates are: 21°40'12" to the north, 20°00'54" to the south, 99°02'35" to the east and 100°35'48" to the west.

## Territorial extension

The state has a territorial extension of 11,690.58 km², which represents 0.6% of the total surface area of the country.

## Territorial division and extension of the municipalities

Querétaro is divided into 18 municipalities, each one with particular characteristics, which makes it unique among all other states of the country when it comes to the extent and diversity of attractions it has to offer.

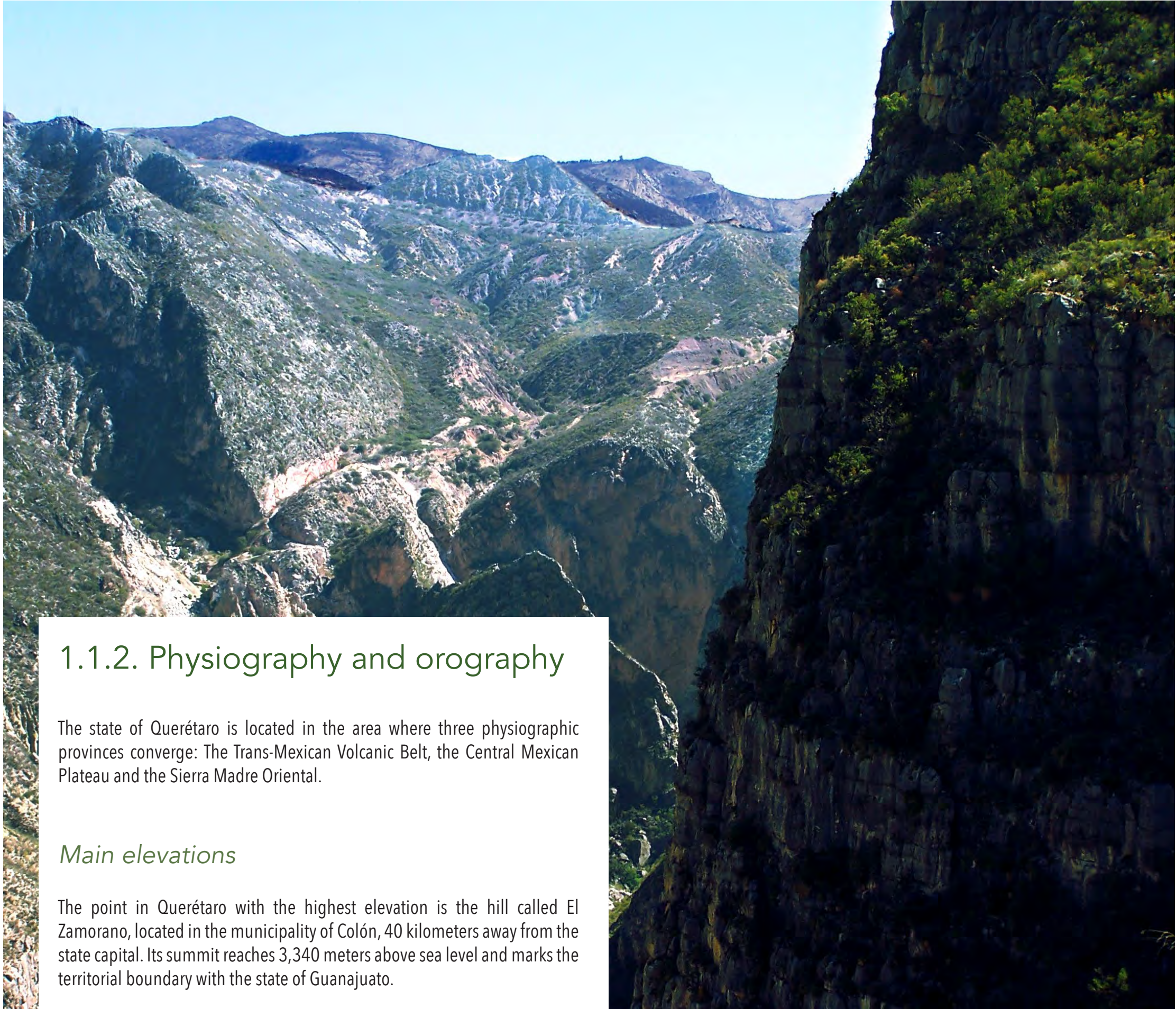
The capital of the state is the municipality of Querétaro.

The municipalities of Corregidora, El Marqués, Huimilpan and Querétaro constitute 18% of the territorial extension of the entity; San Juan Río and Tequisquiapan constitute 10%; and the rest of the municipalities 72%.

The municipalities with an extension inferior to 3% of the state territory are: Pedro Escobedo, Ezequiel Montes, San Joaquín and Corregidora.

Amealco de Bonfil, San Joaquín and Pinal de Amoles are the municipalities with the highest altitude in the state, while Landa de Matamoros, Arroyo Seco and Jalpan de Serra are those with the lowest altitudes in meters above sea level (masl).





### 1.1.2. Physiography and orography

The state of Querétaro is located in the area where three physiographic provinces converge: The Trans-Mexican Volcanic Belt, the Central Mexican Plateau and the Sierra Madre Oriental.

#### Main elevations

The point in Querétaro with the highest elevation is the hill called El Zamorano, located in the municipality of Colón, 40 kilometers away from the state capital. Its summit reaches 3,340 meters above sea level and marks the territorial boundary with the state of Guanajuato.

Elevations of the state of Querétaro.

Hill	Elevation (masl)
Trans-Mexican Volcanic Belt	
Grande	2,820
Bravo	2,810
Gordo	2,530
Peña de Bernal	2,430
Central Mexican Plateau	
El Zamorano	3,340
Sierra Madre Oriental	
El Espolón	3,240
La Pingüica	3,160
Las Vigas	3,120
La Laja	3,120
La Calentura	3,060
El Gallo	2,760
El Tejocote	2,720
La Peña Azul (Sierra)	2,700
El Frontón	2,500
Joya de las Papas	2,160

Sources: National Statistics and Geography Institute. 2017 Geographic and Statistical Yearbook of Querétaro. Retrieved on March 25th, 2021. masl: meters above sea level.





### 1.1.3. Climate

There are three climatic areas in the state of Querétaro: the first one corresponds to a part of the physical province of the Trans-Mexican Volcanic Belt; the second one adds some regions of the Sierra Madre Oriental and the Central Mexican Plateau to the Trans-Mexican Volcanic Belt; and the third one belongs exclusively to a specific region of the Sierra Madre Oriental.

The physiography of the state is closely linked to the three large climate groups that exist. Subhumid temperate climates are predominant in the south of the state; in the central region, dry and semi-dry climates prevail; and finally, in the northeastern region the main climates are warm and subhumid semi-warm.

#### Climate profile

There are nine different types and subtypes of climates in Querétaro for the three climatic areas as described below:

Percentage of the state surface by type of climate.	
Climate type or subtype	Percentage
Warm subhumid with rains in summer	2.9
Humid semi-warm with abundant rains in summer	0.9
Subhumid semi-warm with rains in summer	21.5
Humid temperate with abundant rains in summer	0.8
Subhumid temperate with rains in summer	23.2
Semidry very warm and warm	0.4
Semidry semi-warm	9.1
Semidry temperate	37.3
Dry semi-warm	4.1
<b>Total</b>	<b>100.0</b>

Sources: National Statistics and Geography Institute. National Continuum of the Geographic Data Set of the Climate Chart Scale 1: 1 000 000, series I. 2017 Geographic and Statistical Yearbook of Querétaro. Retrieved on March 25, 2021.

It is also useful to classify the state territory into "natural regions" where the semi-arid region predominates with 55.1%:

#### Percentage of the state surface according to main natural regions.

Climate type or subtype	Percentage
Temperate	25.4
Humid tropical	0.0
Dry tropical	19.5
Arid	0.0
Semi-arid	55.1
<b>Total</b>	<b>100.0</b>

Sources: INEGI, 2020 Geographic and statistical yearbook by state. SARH. Statistical Compendium of Livestock Production, 1989-1993.

#### Average annual temperature

The National Water Commission (CONAGUA) has six meteorological stations recording the temperatures and volumes of rainfall. The average temperature per available period for each station is shown below.

In 2020, Presa el Capulín was the station that reported the lowest temperature, 0° C, while the highest temperature, 41°C, was recorded in Ayutla. The stations of Jalpan and Toliman stopped their operations during 2020 due to the pandemic.

#### Average annual temperature of the state of Querétaro, 2020.

Station	Average temperature <sup>1</sup>	Coldest temperature of the year <sup>1</sup>	Warmest temperature of the year <sup>1</sup>
Ayutla	24.7	7	41
Jalpan	S/D	S/D	S/D
Presa El Capulín	15.8	0	31
Querétaro	20.6	3.5	34.8
San Juan del Río	21.7	2	37.5
Tolimán	S/D	S/D	S/D

Source: National Water Commission, 2021.  
<sup>1</sup> Figures in degrees Celsius (°C).  
 S/D: without information. Station that stopped operations in 2020 due to the pandemic.



# 1.1.4. Edaphology

Edaphology is the study of the nature of soils based on their chemical, physical and biological properties which allows for their classification and grouping into units.

According to the National Statistics and Geography Institute, there are more than 10 groups of prevailing soil types in Querétaro. The following are among those groups that cover the highest percentage of the entity's surface area: leptosol, 30.6%; phaeozem, 23.5%; vertisol, 20.6%; luvisol, 13.9%; and regosol, 5.4%.

## Environmental diagnosis

According to data from the Regional Ecological Planning Program of the State of Querétaro, there are two main causes for soil degradation: pollution and erosion.

Soil pollution derives from the use of synthesized substances, which are usually non-biodegradable, and from an inappropriate final disposal in homes, the industry, agriculture and livestock. In Querétaro there are laws in place that strengthen prevention and measures are being taken to eliminate other factors that contribute to this type of pollution.

According to the diagnosis made in the technical studies conducted for the updated revision of the Regional Ecological Planning Program of the State of Querétaro, the municipalities of Amealco de Bonfil, Colón, Tequisquiapan and Tolimán are the ones that show the highest percentage of impact from some type of erosive process in terms of their territorial surface.

To sum up, slight laminar water erosion is the dominant type, followed by laminar water erosion with groove formation. A high percentage of wind erosion was also found in the municipalities of Ezequiel Montes and Tequisquiapan.

## Prevention of soil contamination

Both the General Law for the Prevention and Integral Management of Waste, and the Law for the Prevention and Integral Management of Waste of the State of Querétaro foster prevention in the generation, recovery and comprehensive management of hazardous waste, including urban solid waste and special management waste, to anticipate the damage of pollution and, ultimately, carry out actions for its remediation.





# 1.1.5. Hydrology

## Surface hydrology

In relation to bodies of water and their characteristics, Querétaro is located in the regions of Lerma-Santiago on the Pacific Ocean drainage basin and Pánuco on the Gulf of Mexico drainage basin.

The Lerma-Santiago region is made up of the Lerma-Toluca and Laja river basins, which represent 1.8% and 19.4%, respectively, of the total surface area of the state. This region has an average annual volume of natural runoff of 13,061.6 hm³ and an average annual availability of 9,503.8 hm³.

The Pánuco region is made up of the basins of the Moctezuma and Tamuín rivers. It covers approximately 78.8% of Querétaro’s territory, and its main currents are the Ayutla, Concá, Extoraz, Jalpan, Moctezuma, San Juan, Santa María and Tolimán rivers. It has an average annual volume of natural runoff of 20,223.6 hm³ and an average annual availability of 49,069.6 hm³.

## Supply Sources

The National Water Commission (CONAGUA) states that Querétaro’s territory is located at the confluence of 12 aquifers: 11 of them in Querétaro, and one more that is shared with the state of San Luis Potosí.

The aquifers show variable mean recharges among themselves: the highest is the one of the Valley of San Juan del Río with 191.5 hm³ per year, followed by the one of the Valley of Tequisquiapan with 108.1 hm³.



hm³ = Cubic hectometer, a unit of volume that represents one million cubic meters.

Surface hydrology of the state of Querétaro.				
Region		Basin		Percentage of the state's surface area
Code	Name	Code	River	
RH12	Lerma-Santiago	A	Lerma-Toluca	1.8
		H	Laja	19.4
RH26	Pánuco	C	Tamuín	23.2
		D	Moctezuma	55.6
Total				100.0

Source: National Statistics and Geography Institute. 2017 Geographic and Statistical Yearbook of Querétaro. Retrieved on March 25, 2021.

Aquifers in the state of Querétaro.				
Aquifer	Average recharge (m³/year)	Natural discharge (m³/year)	Volume of groundwater extraction	Availability and/or deficit
Valley of Querétaro	70.00	4.00	129.72	-63.72
Valley of Amazcala	34.00	2.80	54.45	-23.25
Valley of San Juan del Río	191.50	0.00	327.76	-136.26
Valley of Buena Vista	11.00	0.10	23.34	-12.44
Valley of Tequisquiapan	108.10	2.60	108.07	-2.57
Valley of Cadereyta de Montes	4.10	0.00	4.14	-0.04
Tolimán	8.40	2.90	9.46	-3.96
Valley of Huimilpan	20.00	2.00	21.91	-3.91
Valley of Amealco de Bonfil	22.50	0.80	20.84	0.86
Moctezuma	50.00	6.50	0.07	43.43
Tampaón (sierra region)	49.00	13.60	2.39	33.01

Source: Official Federal Gazette 07/09/2020.

Notes: The figures are provided in millions of cubic meters per year.

The availability of groundwater is updated at least every 3 years.

The volume of groundwater extraction is made up of: the awarded/assigned volumes of groundwater; the volume of water extraction in the zones of provisional suspension of free extraction and those registered in the Permanent National Registry; the volumes of water extraction pending authorization and/or registration in the REPDA; the volumes of water corresponding to reserves, regulations and water scheduling.



# 1.1.6. Biodiversity

Despite being one of the smallest states in the country, Querétaro has a great climate and ecosystem diversity. Due to its geographical location, it encompasses part of the Trans-Mexican Volcanic Belt in its southwestern region, part of the Central Mexican Plateau in its central region, and it reaches the Sierra Madre Oriental in its northeastern region.

Almost all types of flora known in the country can be found in the state of Querétaro. The preserved vegetation covers 50.6% of the total surface area of the state territory, the disturbed vegetation covers 19%, the areas without vegetation or with urban or industrial occupation cover 3.7%, and 26.36%, of the surface area corresponds to irrigated and rainfed agriculture land. This wide-ranging variety of ecosystems favors biodiversity.

The following information is the result of the research published in the Autonomous University of Querétaro’s 2016 book about Querétaro’s Natural History and the “Flora and Fauna Unit” database of the Ministry of Sustainable Development of the State of Querétaro:

## Flora

Querétaro has a significant diversity consisting of more than 4 thousand species. Among them there are 2,421 varieties of vascular plants that are part of 170 families and 937 genres. SEDESU’s database identifies that, from the aforementioned species, 64 are classified under some risk category in accordance with NOM-059-SEMAR-NAT-2010 “Environmental protection - Wild flora and fauna species that are native of Mexico - Risk categories and specifications for their inclusion, exclusion or change - List of endangered species”. Out of these species, 26 belong to the cactus family and 24 are endemic.

## Mushrooms

Fungi are organisms that degrade organic matter. They play an important ecological role in nature by participating in the recycling processes of organic matter thus fostering the formation and conservation of the soil. They also maintain the balance of natural ecosystems through their relationships with other organisms. A total of 633 species of macromycetes fungi have been registered in the state of Querétaro.

## Fauna

### • Vertebrates

There are 715 vertebrate species registered in SEDESU’s list, where birds are the most diverse group with a variety of 431 species, followed by reptiles, mammals, fish, and amphibians.

According to NOM-059-SEMARNAT-2010, 118 out of the 715 vertebrate species registered in the entity are under some risk category with various degrees of endemism: 8 fish, 13 amphibians, 50 reptiles, 32 birds and 15 mammals. The reptile group, which represents 42.4% of the endangered species, is the most affected.

### • Invertebrates

Invertebrate animals form the largest group of animals. They are characterized by the lack of a spine and an articulated internal skeleton; most of them have external protection, some sort of armor, like beetles, but there are invertebrates that do not have any type of protection. The number of studies and records for this group is insufficient in the state of Querétaro; nonetheless, 523 insect species, 8 decapod crustacean species, and 17 scorpions have been identified.



Registry of vertebrate species in the state of Querétaro.

Group	Species	Families
Birds	431	67
Reptiles	104	21
Mammals	101	22
Fish	45	12
Amphibians	34	9

Source: Ministry of Sustainable Development of the Executive Power of the State of Querétaro. Department of Conservation and Protected Natural Areas. Flora and Fauna Unit, 2021.



# 1.2. Environment and environmental management

## 1.2.1. Air

An atmospheric monitoring system that renders reliable, quality information and coverage is one of the strategies of the Management Program to Improve Air Quality in the Metropolitan Area of Querétaro-San Juan del Río 2014-2023. To this end, the project of the Querétaro State Air Quality Monitoring Center (CeMCAQ for its Spanish acronym), operated by the Ministry of Sustainable Development.

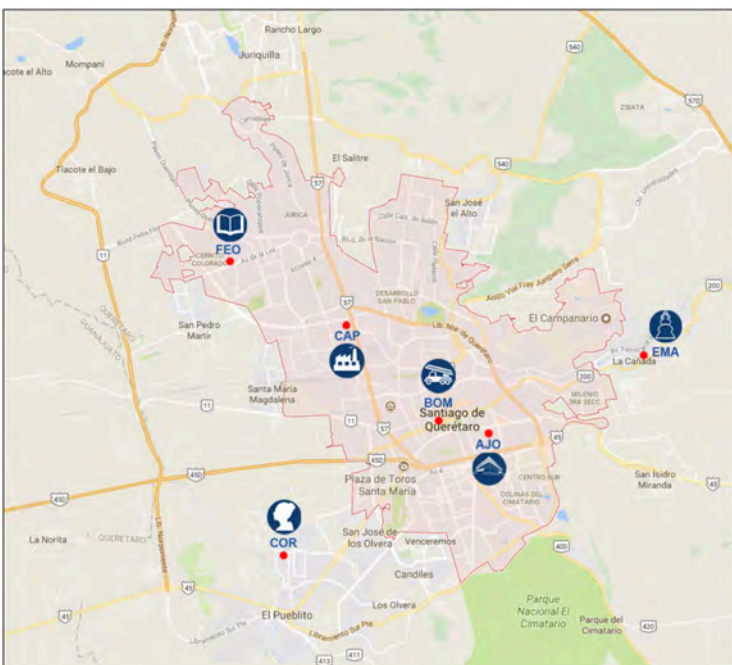
### Atmospheric monitoring

The Ministry of Sustainable Development of the state of Querétaro has an atmospheric monitoring network whose purpose is to understand the pollutant's behavior: carbon monoxide, nitrogen dioxide, sulfur dioxide, ozone, particles smaller than 2.5 microns and particles smaller than 10 microns. This network renders statistical data that is used for decision-making with the end goal of protecting the population's health.

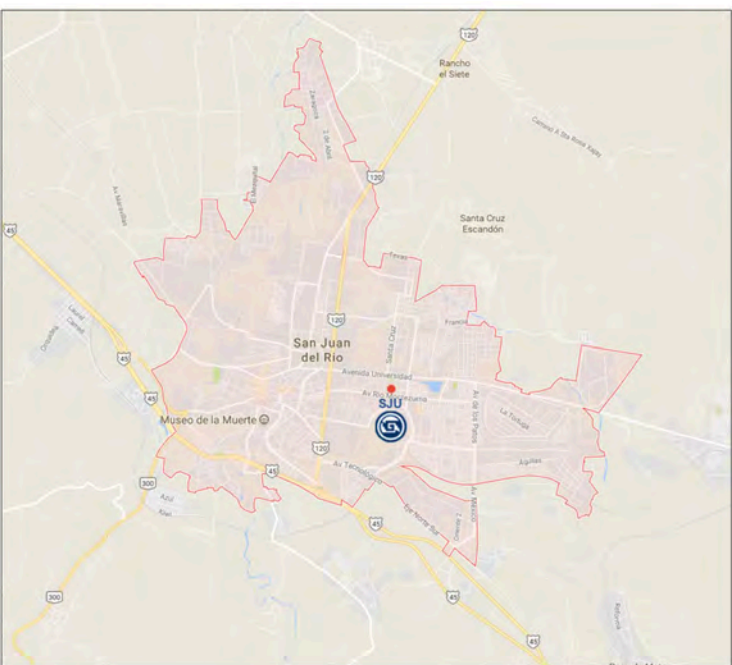
The monitoring stations also measure meteorological parameters such as pressure, solar radiation, temperature, wind direction and speed, relative humidity and rainfall.

The network is made up of the following stations in the metropolitan areas of Querétaro and San Juan del Río:

Monitoring stations in the City of Querétaro and its suburbs.



Monitoring stations in San Juan del Río.



Source: [www.cemcaq.mx/monitoreo](http://www.cemcaq.mx/monitoreo)



Félix Osores (FEO)



Carrillo Puerto (CAP)



El Marqués (EMA)



Bomberos (BOM)



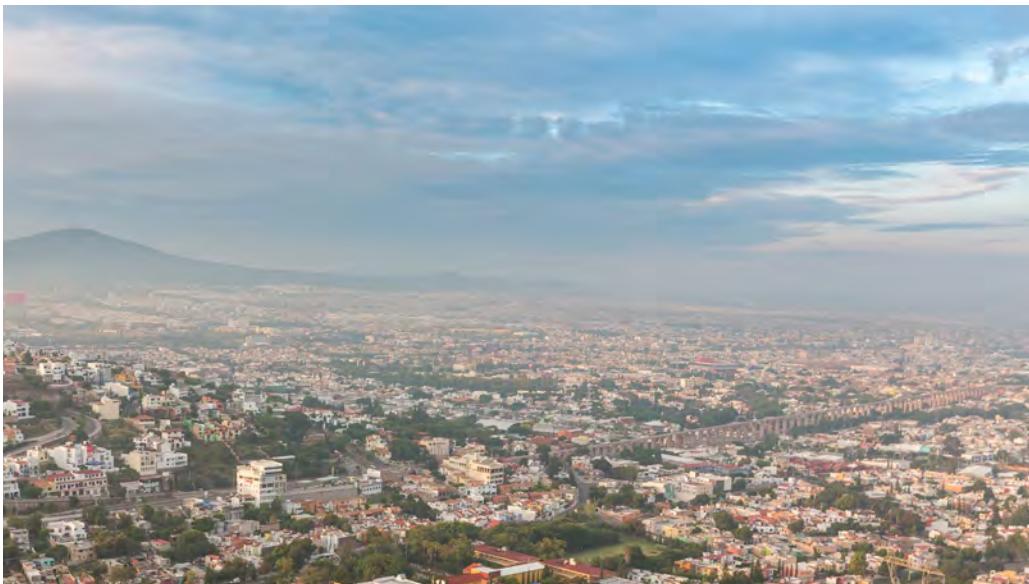
Corregidora (COR)



Auditorio Josefina Ortíz (AJO)



San Juan del Río (SJU)



With the aim of keeping the population informed, the project for the Official Mexican Standard NOM-172-SEMARNAT-2019 "Guidelines for obtaining and communicating the Air Quality and Health Risks Index" develops precise and easy-to-interpret data:

- The purpose of the air and health index is to inform the population about the quality of air, about health risks and protective measures that can be taken.
- The air and health index is solely informative and can be used to prevent the population in a city or locality at a specific time.
- Recommendations are transmitted to the population for each category of the air and health index.

The colors assigned for each category are the following:

● Good

● Acceptable

● Bad

● Very bad

● Extremely bad



## Prevention and control of atmospheric pollution

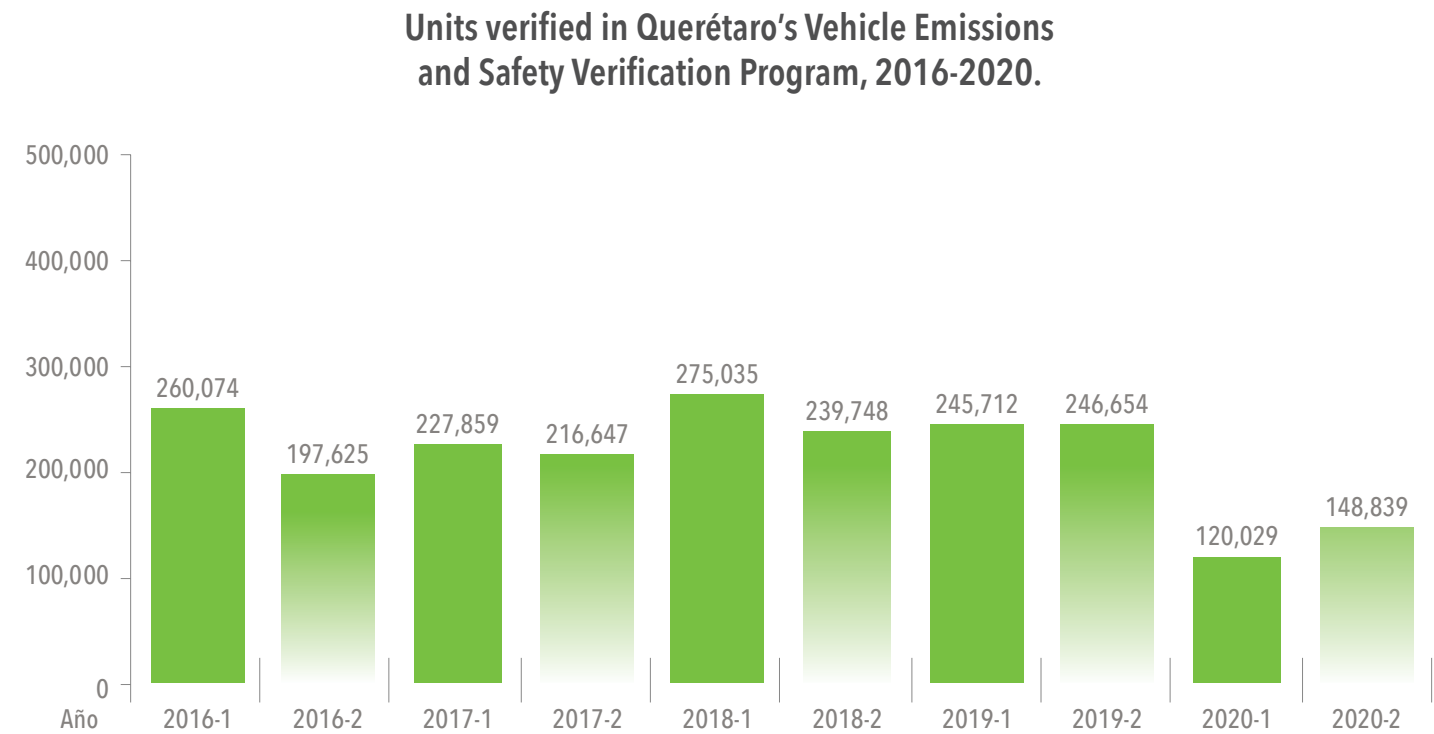
One of the mechanisms used to control mobile pollution sources is the State Vehicle Emissions and Safety Verification Program, which consists of the biannual verification of the emission of pollutants from private, heavy-duty, public service, cargo, passenger, utility and official vehicles.

The Program aims to establish a calendar and guidelines according to which the polluting emissions of all internal combustion motor vehicles registered in the State Vehicle Registry, other entities, and abroad, that are in circulation in the state of Querétaro must be verified, with the exception of motorcycles or automobiles that, due to their technological characteristics, cannot be tested according to the protocols established in the Official Mexican Standards.

In 1990 Querétaro was the second federative entity that implemented a mandatory program for the control of pollution caused by mobile sources, the first being the Federal District, today known as Mexico City.

From the total number of vehicles in the registry, 120,029 units were verified in the first semester of 2020, and 148,839 in the second semester.

The behaviors of these variables in recent years are shown below:



**Source:** Ministry of Sustainable Development of the Executive Power of the State of Querétaro. State Vehicle Emissions and Safety Verification Program, 2021.  
**Note:** As of 2016, vehicle emissions and safety verification in the state of Querétaro is carried out every six months.

## Sources of pollution

The main air pollutants are originated in the emissions that come from mobile sources and go into the atmosphere, that is, from the local vehicles in circulation, and also the ones passing through the state, in addition to those pollutants generated as a consequence of urban and industrial development, and those originating from forest fires.

According to the statistics of the Ministry of Planning and Finance of the Executive Power of the state, there were 769,179 motor vehicles in circulation in 2020, a figure that includes trucks, motorcycles and automobiles. From these, 69.2%, or 531,908 units are automobiles, a figure that decreased by -0.3% compared to the 533,491 units registered in 2019.

Registered automobiles in circulation in the state of Querétaro, 2018, 2019 and 2020.			
Municipality	2018	2019	2020
Amealco de Bonfil	6,890	7,570	7,761
Arroyo Seco	1,418	1,612	1,658
Cadereyta de Montes	6,691	7,296	7,254
Colón	6,012	6,629	6,502
Corregidora	56,241	61,523	62,599
El Marqués	24,966	29,533	31,394
Ezequiel Montes	6,063	6,568	6,528
Huimilpan	5,674	6,362	6,644
Jalpan de Serra	2,903	3,186	3,238
Landa de Matamoros	1,359	1,546	1,573
Pedro Escobedo	9,160	9,955	9,767
Peñamiller	1,309	1,456	1,534
Pinal de Amoles	1,172	1,312	1,296
Querétaro	299,086	319,552	315,709
San Joaquín	733	815	812
San Juan del Río	50,385	54,641	53,846
Tequisquiapan	10,444	11,403	11,282
Tolimán	2,291	2,532	2,511
Total	492,797	533,491	531,908

**Source:** Ministry of Finance of the Executive Power of the State of Querétaro, 2021.



# 1.2.2. Water

Water is a vital element for the development of the activities of any living being; it is a non-renewable natural resource that covers three quarters of the planet in the form of rivers, seas and lakes.

Only 2.5% of the world's water is drinkable and, according to data obtained by the UNESCO in 2017, 80% of wastewater returns to the ecosystem without being treated or reused in any way. However, the state of Querétaro takes the necessary measures to treat a large percentage of its wastewater in over 30 water treatment plants throughout the entity.

## Pluvial precipitation

According to data from CONAGUA, six meteorological stations were responsible for recording precipitation in the entity in 2020.

The highest average of total annual precipitation in the state is recorded in the station of Jalpan, with 819.2 mm, and the lowest one in Tolimán, with 313.7 mm, according to the recording periods. The average rainfall in each of these stations is detailed below:

Precipitation in the state of Querétaro.				
Station	Period	Average rainfall (mm)	Rainfall of the driest year (mm)	Rainfall of the rainiest year (mm)
Ayutla	1980 - 2020	661.7	272.5	1,322.5
Jalpan	1980 - 2020	819.2	447.6	1,350.5
Presa El Capulín	1980 - 2020	803.6	514.9	1,274.1
Querétaro	1980 - 2020	569.0	187.7	935.4
San Juan del Río	1980 - 2020	488.6	226.3	695.3
Tolimán	1980 - 2020	313.7	186.0	877.6

Source: National Water Commission, 2021.  
mm: millimeters.



## Water treatment

Querétaro treats 87.8% of its wastewater in 40 public water treatment plants operated by the CEA, with a capacity of 1,706.85 liters per second (lps). The annual volume of treated water amounts to 41,853,302.88 m³.

The municipalities with the highest number of public water treatment plants are Querétaro and Huimilpan, with 6 each, and El Marqués and Colón with 4 each, and the rest of the municipalities have one or two plants in operation.

On the other hand, CONAGUA has a registry of 51 public water treatment plants and 176 private water treatment plants distributed in 16 and 17 municipalities respectively.

It is important to highlight that the municipality of San Juan del Río has 10 public water treatment plants with a capacity of 473 lps, and that its annual volume of treated water is 5,754,180 m³, a figure that represents an approximate coverage of 45%.





### 1.2.3. Energy

In Mexico most of the energy comes from non-renewable natural resources, mainly hydrocarbons and coal, so it is crucial to search for alternatives for their preservation.

#### *Efficient use of energy*

According to data from the Energy Saving Trust (FIDE for its Spanish acronym), in 2018 the energy savings obtained from the implementation of summer daylight saving time would be used to power 592,240 dwellings for a whole year (based on an average bimonthly consumption of 266 kW), or they would keep 8.3 million lamps lit 24 hours per day, 365 days per year.

Specialists have recognized Querétaro's potential for generating electrical energy from alternative sources, using the likes of wind or photovoltaic systems, thanks to its geographic and climatic conditions. In a 2016 publication, the Electrical Research Institute reported a daily average solar radiation of 5.9 kWh/m<sup>2</sup> per day in Querétaro.

The World Bank Group makes the Global Solar Atlas ([www.globalsolaratlas.info/](http://www.globalsolaratlas.info/)) available for consultation, promoting a broader use of solar energy in many countries, including Mexico.





# 1.2.4. Ecological ordering

The Ecological Ordering (EO) is the instrument of environmental policy that consists of planning and applying measures to regulate, induce and evaluate the use of the land, and program the management of natural resources and productive activities. The goal of this planning is to protect the environment, and to preserve and use natural resources sustainably through the analysis of deterioration trends, their possible recovery and the potentialities of their use.

According to the General Law of Ecological Balance and Environmental Protection (LGEEPA) there are four types of EO:

- General
- Marine
- Regional
- Local

The first two modalities are under Federal management. For the other two, article 35 of the Law of Environmental Protection for Sustainable Development of the State of Querétaro (LPADSEQ for its Spanish abbreviation) provides that the state territory's EO must be implemented regionally when the programs' scope covers the whole state, or part of it, or else, locally, when the programs' scope covers a municipality, whether fully or partially.

Having an instrument for the environmental planning of the territory is crucial since it allows for the identification, prevention and reversal of those processes that deteriorate the environment, such as water scarcity and pollution, the damage and loss of flora and fauna species, the degradation of soil and the loss of areas covered by vegetation, among others; and it also helps reduce the vulnerability of human populations to natural disasters and climate change.

## Program for the General Ecological Ordering of the Territory (POEGT for its Spanish abbreviation)

It is a public policy instrument supported by the LGEEPA and the regulations on EO matters. Its observance is mandatory throughout the national territory and its purpose is to link the actions and programs of the Federal Public Administration that must consider the environmental variable in terms of the Planning Law.

The POEGT was issued in September 2012, regionalizing the national territory into Biophysical Environmental Units (UAB for its Spanish abbreviation). These are made up of the main factors of the biophysical environment: climate, topography, vegetation and soil. In order to manage the UAB, 10 ecological guidelines, 44 general strategies and 4 environmental policies were established:

- Preservation
- Protection
- Restoration
- Sustainable use

The state of Querétaro is part of the following UAB:

### Biophysical Environmental Units in which the state of Querétaro is located.

Region code	UAB <sup>1</sup>	Name of the UAB <sup>1</sup>	Development guidelines	Development aids	Development Associates	Other sectors of interest	Environmental policy	Level of priority attention
5.17	30	Karst Huasteco North	Forest	Mining and preservation of flora and fauna	Agriculture and Livestock	PEMEX and indigenous peoples	Preservation, sustainable use and restoration	Low
18.8	44	Sierras and Plains of the North of Guanajuato	Agriculture and preservation of flora and fauna	Livestock and mining	Population	Indigenous villages	Restoration and sustainable use	High
	52	Northern Plains of Guanajuato	Agriculture and preservation of flora and fauna	Agriculture, social development, livestock and mining		PEMEX and indigenous peoples	Restoration and sustainable use	Intermediate

**Sources:** Ministry of Sustainable Development of the Executive Power of the State of Querétaro, with information extracted from the 2012 POEGT. Program for the General Ecological Ordering of the Territory (POEGT, 2012). Ecological Regionalization of Biophysical Environmental Units.  
<sup>1</sup> Biophysical Environmental Unit.



Program for the Regional Ecological Ordering of the State of Querétaro (POEREQ for its Spanish abbreviation)

It is an inductive-regulatory environmental planning instrument that divides the state territory into 412 Environmental Management Units (UGA for its Spanish abbreviation). The POEREQ establishes 23 environmental guidelines or goals, and 113 actions with the objective of reducing conflicts in environmental matters and guiding the state’s development in accordance with the territorial capacity.

General classification of Environmental Management Units (UGA).	
UGA number	Vocation
191	Urban
62	Preserved vegetation
46	Proposed protected natural area
43	Rainfed agriculture
27	Water
15	Priority area for conservation
10	Core area
9	Natural area decreed as protected
8	Irrigation agriculture
1	Rainfed and irrigation agriculture
1	Park

Source: Ministry of Sustainable Development of the Executive Power of the State of Querétaro. Environmental Sub-ministry 2021, with information from POEREQ 2009.

According to their vocation and aptitude, UGAs can be classified into 4 groups that correspond to environmental policies in matters of ecological ordering according to their description in the program:

- 1. **Protection:** They are in charge of the natural areas decreed as protected, the proposals, and the core areas.
- 2. **Conservation:** They are the ones that describe vegetation, water, park, and priority areas for their preservation.
- 3. **Sustainable use:** They are the ones related to irrigated and rainfed agriculture.
- 4. **Urban:** They are those that describe growth centers identified by urban development instruments.

The policies defined for the Ecological Ordering of the Territory are derived from the applicable environmental legislation in this subject matter, and their objective is to maintain the structure, function, preservation and sustainable use of the territory. These policies are the following:

- **Protection (PP):** for units whose environmental conditions are relevant for the preservation of flora and fauna species; riparian and aquatic ecosystems; natural elements involved in the hydrological cycle, such as soil and its coverage; forest areas; areas of scenic, historical, archaeological, paleontological or scientific value, or when the Units are identified as risk areas or subject to limitations or easements for the protection of the public domain.

- **Preservation (PC):** for units that have a balance in their ecosystems and whose current uses do not affect or alter its functioning. Given their characteristics of stability, they could be allocated for sustainable use when the sustainability of the flora and fauna is guaranteed, and their balance is not affected nor their potential diminished, putting their stability at risk. It includes natural or man-induced green areas in order to compensate for environmental services within or near urban developments, providing connectivity to the mobility and natural dispersion of regional biodiversity, functioning as ecological corridors.
- **Restoration (PR):** it is focused on units showing signs of degradation, damage or impact as a direct or indirect result of natural or anthropogenic events, to the extent that the ecosystem cannot recover the condition prior to its alteration by its own means. The restoration will be focused on initiating or accelerating the recovery process of the ecosystem with respect to its integrity and sustainability so as to recover its optimal state, always using existing species from the region.
- **Sustainable use (PAS):** it is for the Units that due to their physical and biological characteristics are appropriate for the use and management of their resources, preferably for the consolidation of primary activities; provided that the availability and resilience in the management of resources is considered, as well as the maintenance of its biodiversity.
- **Urban Development (PDU):** they are the Units located in growth centers, with urban uses of the land and allocations, and their corresponding growth and regulation projection established in the existing urban planning instruments.





# Local Ecological Ordering Programs (POEL for its Spanish abbreviation)

The objective is to strategically regulate the use of the land and its allocation outside of the growth centers acknowledged in the urban planning instruments through environmental policies (Protection, Preservation, Restoration, Sustainable Use), guidelines, and ecologic regulation strategies and criteria.

There are currently thirteen POELs in force in the municipalities of Amealco, Cadereyta, Colón, Corregidora, El Marqués, Ezequiel Montes, Huimilpan, Pedro Escobedo, Querétaro, San Joaquín, San Juan del Río, Tequisquiapan and Tolimán. This ecological planning represents 67.18% of the surface of the state territory, an area where 94.4% of the state’s population lives.

Considering the thirteen local ecological ordering programs that have been approved and published, plus the natural areas that are protected in the territory, Querétaro becomes the first state country-wide with environmental instruments for the planning and management of natural resources, and the uses and allocations of land with a focus on sustainability.



POEL in the state of Querétaro.		
Municipality	Council approval	Sombra de Arteaga publication
Amealco de Bonfil	22/04/16	24/06/16
Cadereyta	14/11/17	09/05/18
Colón	08/02/18	23/02/18
Corregidora	14/12/16	10/02/17
El Marqués	11/04/18	01/06/18
Ezequiel Montes	16/01/20	31/04/2020
Huimilpan	28/03/18	20/04/18
Pedro Escobedo	12/01/17	17/02/17
Querétaro	29/04/14	16/05/14
San Joaquín	06/09/18	21/09/18
San Juan del Río	13/10/17	12/01/18
Tequisquiapan	28/09/15	30/10/15
Tolimán	13/09/18	25/09/18

Source: Ministry of Sustainable Development of the Executive Power of the State of Querétaro. Environmental Sub-ministry, 2021.



# Protected Natural Areas (ANP for its Spanish abbreviation)

These are areas of the national territory over which the nation exercises its sovereignty and jurisdiction. ANPs stand out because their original environments have not been significantly altered by human activity or they need to be preserved and restored.

ANPs are instituted by means of a presidential decree and the activities that can be carried out in them are established in accordance with the General Law of Ecological Balance and Environmental Protection and its regulations, the management program and the ecological ordering programs. These protected areas are subject to special protection, conservation, restoration and development regimes, according to categories stated by law.

## Protected Natural Areas in the entity

The Environmental Protection Law for Sustainable Development of the State of Querétaro defines Protected Natural Areas as the areas of the entity that are subject to the protection regime. The purpose is to preserve and conserve natural environments, safeguard biodiversity, use natural resources in a sustainable way, and care for and improve the quality of the environment and the environmental services that ecosystems provide.

There are 15 ANPs registered in the state of Querétaro. Four of them are federal, six are statal and five are municipal, and they are distributed among 13 of the 18 municipalities.

The decreed areas add up to a total surface area of 434,928.56 hectares which represent 37.2% of the state surface area.

Protected Natural Areas in the state of Querétaro.							
Total	Protected Natural Area	Category	Date of publication of the declaration	Publication medium	Municipalities	Area (hectares)	Percentage of the state surface
Protected Natural Areas of the Federal Order							
4	Cerro de las Campanas	National Park	July 7, 1937	Official Federal Gazette	Querétaro	3.8	0.0
	El Cimatario	National Park	July 21, 1982 (first) July 27, 1982 (second)		Corregidora Huimilpan Querétaro	2,447.9	0.2
	Sierra Gorda	Biosphere Reserve	May 19, 1997		Arroyo Seco Jalpan de Serra Landa de Matamoros Peñamiller Pinal de Amoles	383,567.4	32.8
	Zona Protectora Forestal	Natural Resources Protection Area	November 4, 1941		Amealco de Bonfil San Juan del Río	23,255.0	2.0
Natural Protected Areas of the State Order							
6	Mario Molina Pasquel "El Pinalito"	State Reserve	February 7, 2003	Official Journal of the Government of the State of Querétaro La Sombra de Arteaga	El Marqués	1,592.5	0.1
	El Tángano	Area Subject to Ecological Conservation	March 22, 2005		El Marqués Huimilpan Querétaro	717.7	0.1
	Bordo Benito Juárez	Ecological Preservation Zone in Growth Centers with a Subcategory of Intraurban Park	February 13, 2009		Querétaro	27.6	0.0
	Tángano II	Ecological Reserve Zone	May 22, 2009		El Marqués Huimilpan	137.6	0.0
	Peña de Bernal	Protected Landscape	June 5, 2009		Ezequiel Montes Tolimán	263.9	0.0
	El Batán	Ecological Reserve Zone	June 6, 2013		Corregidora	3,341.6	0.3





Protected Natural Areas in the state of Querétaro.							
Total	Protected Natural Area	Category	Date of publication of the declaration	Publication medium	Municipalities	Area (hectares)	Percentage of the state surface
Protected Natural Areas of the Municipal Order							
5	Zona Occidental de Microcuencas	Area Subject to Ecological Conservation	August 30, 2006 (by Agreement of Querétaro City's Council)	Municipal Gazette of Querétaro's City Council	Querétaro	12,234.1	1.1
	Jurica Poniente	Ecological Preservation Zone in Growth Centers with a Subcategory of Intraurban Park	September 25, 2006		Querétaro	224.1	0.0
	Cañada Juriquilla	Ecological Preservation Zone in Growth Centers with a Subcategory of Intraurban Park	May 19, 2009		Querétaro	22.1	0.0
	Sierra de El Raspiño	Ecological Preservation Zone in Growth Centers with a Subcategory of Intraurban Park	September 12, 2014		Querétaro	4,104.2	0.4
	Cerro Grande	Ecological Preservation Zone in Growth Centers with a Subcategory of Intraurban Park	September 12, 2014		Querétaro	2,989.2	0.3
Total						434,928.6	37.2

Source: Ministry of Sustainable Development of the Executive Power of the State of Querétaro, 2021.





Management programs for Protected Natural Areas

They are essential planning and regulation tools that establish the activities, actions and basic guidelines for the operation and administration of the ANP.

Five management programs have been officially published. There are four of them under the state regime and one under the federal regime:

Management Programs for Protected Natural Areas in the state of Querétaro.			
Regime	Protected Natural Area	Date of publication of the Management Plan	Publication medium
State	Bordo Benito Juárez	Summary - June 4, 2010	Official Journal of the Government of the State of Querétaro La Sombra de Arteaga
	El Batán	Summary - June 3, 2016	
	El Tángano	Summary - September 21, 2005	
	Peña de Bernal	Summary - June 24, 2011	
Federal	Sierra Gorda Biosphere Reserve	September 1999	National Institute of Ecology

Source: Ministry of Sustainable Development of the Executive Power of the State of Querétaro, 2021.



# 1.2.6. Waste

The following regulations integrate the state legal framework:

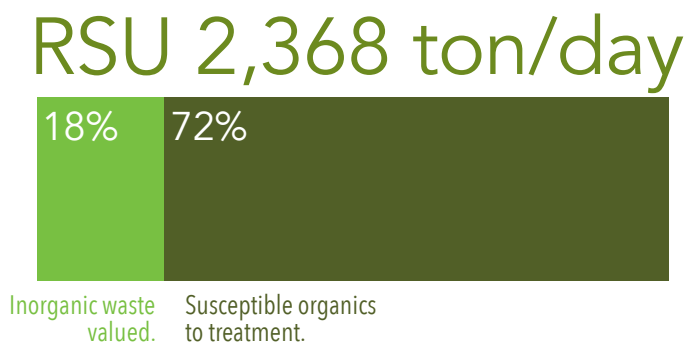
- Political Constitution of the State of Querétaro.
- Law of Environmental Protection for Sustainable Development of the State of Querétaro.
- Law for the Prevention and Integral Management of Waste in the State of Querétaro and its respective regulations.
- State Program for the Prevention and Comprehensive Management of Urban Solid Waste and Waste Requiring Special Handling of the State of Querétaro 2018-2021.

Waste is regulated by means of the organic laws of the municipalities and the existing regulations on ecology which are in accordance with the provisions contained in the official Mexican standards pertaining to this subject matter: The General Law of Prevention and Comprehensive Management of Waste and its respective regulations.

## Solid urban waste

Based on the diagnosis of the State Program for the Prevention and Comprehensive Management of Waste, 2,368 tons of urban solid waste are generated daily in the state (tons/day), from which 18% is valued inorganic waste and 72% is organic waste that can be treated for later use.

The entity's waste makes-up 3% of the total greenhouse gas emissions according to the 2015 base year inventory.



## Waste requiring special handling

According to the General Law for the Prevention and Comprehensive Management of Waste, waste requiring special handling (RME for its Spanish abbreviation) is the waste generated in production processes that doesn't meet the characteristics to be considered as hazardous, and that is also not human solid waste nor produced by large urban solid waste generators.

Based on the diagnosis of the State Program for the Prevention and Comprehensive Management of Waste, the generation of waste requiring special handling is of approximately 4,089 tons/day, of which 58% is valued.

This type of waste is regulated by the Registries of Handling Plans for Waste Requiring Special Handling, whose objective is to minimize the generation and maximize the recovery of RME under criteria of environmental, technological, economic and social efficiency, and under the principles of shared responsibility and comprehensive waste management. Querétaro has 775 registries of handling plans for waste requiring special handling.

In 2020, 194,676 tons (ton) of waste requiring special handling were authorized for repurposing:

- 166,953 tons as a soil improver in accordance with NOM-004-SEMARNAT-2002.
- 941 tons as cattle feed.
- 9,138 tons in authorized disposal banks for their restoration.
- 16,644 tons as raw materials for other production processes.

This has been achieved by preventing the disposal of waste in final disposal sites, which would reduce its useful life.

Deposit of RSU <sup>1</sup> in final disposal sites in 2020.	
Municipality where waste is deposited	Municipality generating the waste
Amealco de Bonfil	Amealco de Bonfil
Arroyo Seco	Arroyo Seco
Cadereyta de Montes	Cadereyta de Montes
Colón (CEMIRO)	Colón
	Corregidora
	El Marqués
	Ezequiel Montes
	Pinal de Amoles
	Tolimán
Huimilpan	Huimilpan
Jalpan de Serra	Jalpan de Serra
Landa de Matamoros	Landa de Matamoros
Peñamiller	Peñamiller
Querétaro	Querétaro
San Joaquín	San Joaquín
San Juan del Río	San Juan del Río
	Pedro Escobedo
Tequisquiapan	Tequisquiapan

Source: Ministry of Sustainable Development of the Executive Power of the State of Querétaro; Environmental Sub-ministry; Department of Environmental Control, 2021.  
<sup>1</sup> RSU: Solid urban waste



## Final disposal sites

At the end of 2020, the state had 15 sites for the final disposal of urban solid waste (RSU for its Spanish abbreviation) out of which six sites are considered landfills:

- Arroyo Seco
- CEMIROQ – Colón
- Landa de Matamoros
- Querétaro
- San Juan del Río
- Tequisquiapan

Six more are categorized as controlled sites:

- Amealco de Bonfil
- Cadereyta de Montes
- Huimilpan
- Jalpan de Serra
- Peñamiller
- San Joaquín

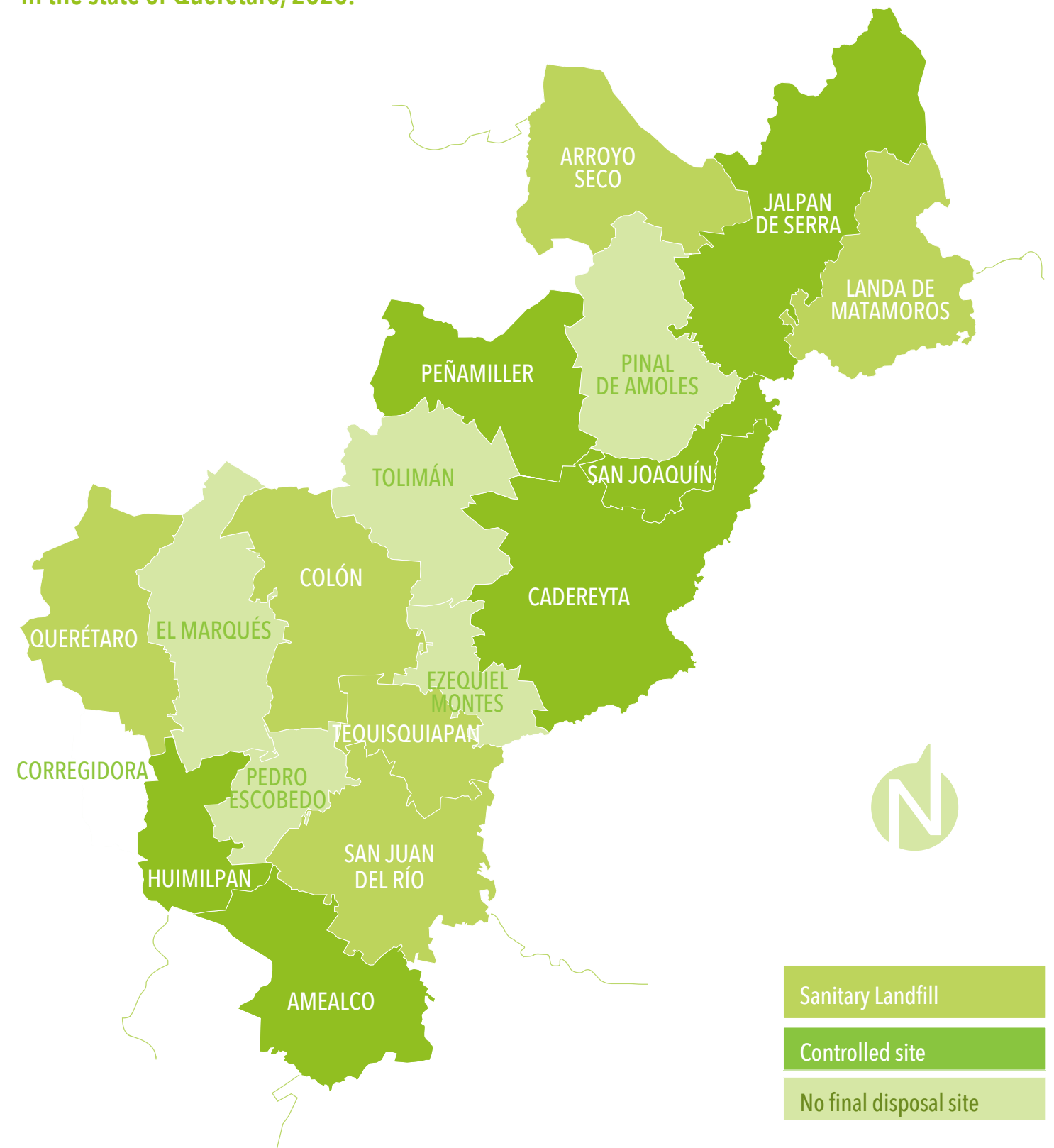
It is worth highlighting that these sites were built as sanitary landfills with waterproofing specifications both in the cells and infrastructure works; however, they are considered as controlled sites since they do not fully comply with the operation requirements to be categorized as sanitary landfills.

There are 3 sites currently not being operated:

- Colón (La Esperanza)
- Corregidora
- Ezequiel Montes

The last uncontrolled site in the state that was operated by a municipality was cleaned up and closed. This was the case of an open-air dump in Tolimán, which currently deposits waste in a sanitary landfill. For this reason, the percentage of tons deposited by type of final disposal site is 93% in sanitary landfill and 7% in controlled sites.

## Sites for the disposal of waste in the state of Querétaro, 2020.



Source: Ministry of Sustainable Development of the Executive Power of the State of Querétaro, Department of Environmental Control 2021.



### 1.2.7. Pollutant emissions

Industrial activity can produce large quantities of water vapor, carbon dioxide, methane, nitrogen oxides, ozone, and chlorofluorocarbons (CFCs). These gases influence the quality of the breathable air and can be classified into three categories:

- Natural origin
- Natural origin accelerated by human activity
- Anthropogenic origin

The third group is made up of all those emissions introduced into the atmosphere by human activities: those from vehicle exhaust pipes, those generated in industrial processes, and those emitted by the solid urban waste, among others.

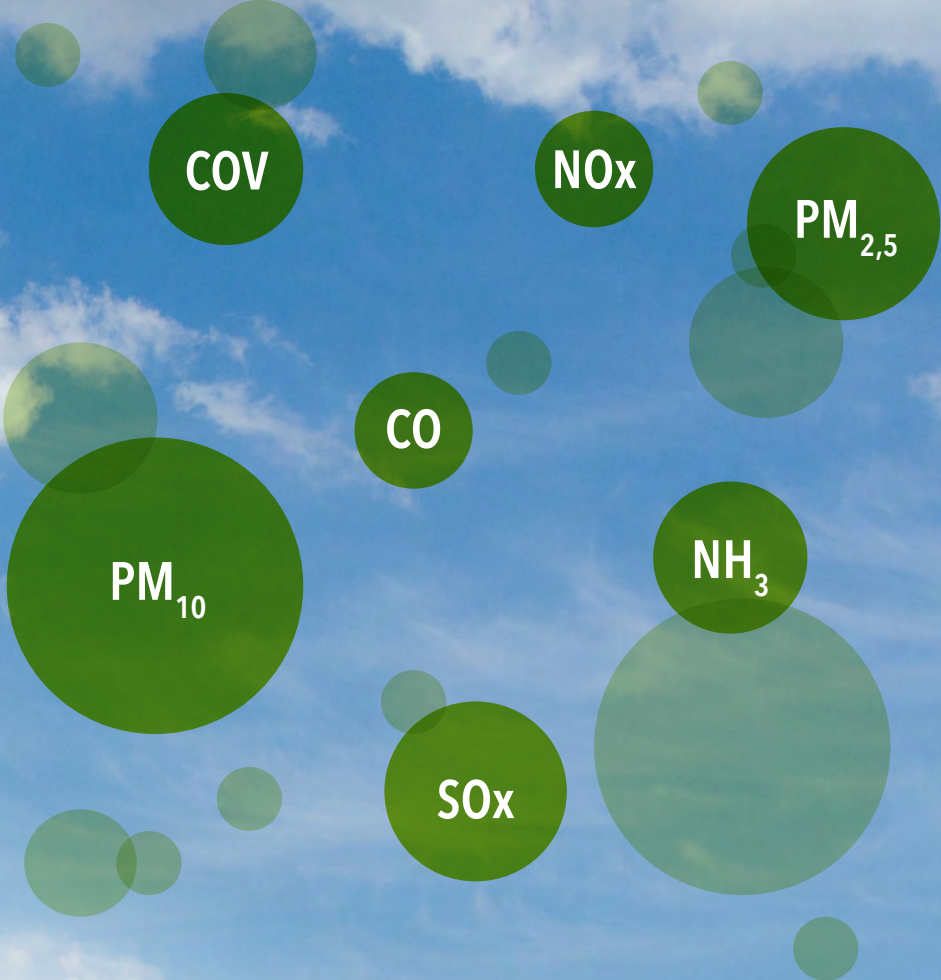
#### Total emissions by source of emission

According to the type of source, the following findings were made:

- Fixed sources: Main contributors of SOx emissions (83%).
- Area sources: Main contributors of emissions of PM10 (73%), PM2.5 (69%) and NH3 (99%).
- Area sources and natural sources: They contribute with the highest percentage of VOC emissions (43%) and (41%) respectively.
- Mobile sources: Main contributors of CO (82%) and NO X (58%) emissions.

#### Municipalities with the highest contribution of emissions

- Querétaro: Has the highest contribution of PM10 (22%), PM2.5 (19%), SOx (54%), CO (45%), NOx (37%) and VOC (25%)
- San Juan del Río: Second contributing municipality of SOx (29%), CO (13%) and NH3 (15%) emissions, and third of PM10 (11%), PM2.5 (11%), NOx (12%) and VOC (10%)
- Pedro Escobedo: Second contributor of PM2.5 (11%) and NOx (13%) and third contributor of SOx (9%) and NH 3 (13%)
- Amealco de Bonfil: Main contributor of NH3 emissions with (20%)
- El Marqués: Second place as a contributor of PM10 emissions (12%)
- Jalpan de Serra: Second contributor of VOC (13%)
- Corregidora: Third place as a CO contributor (7%)

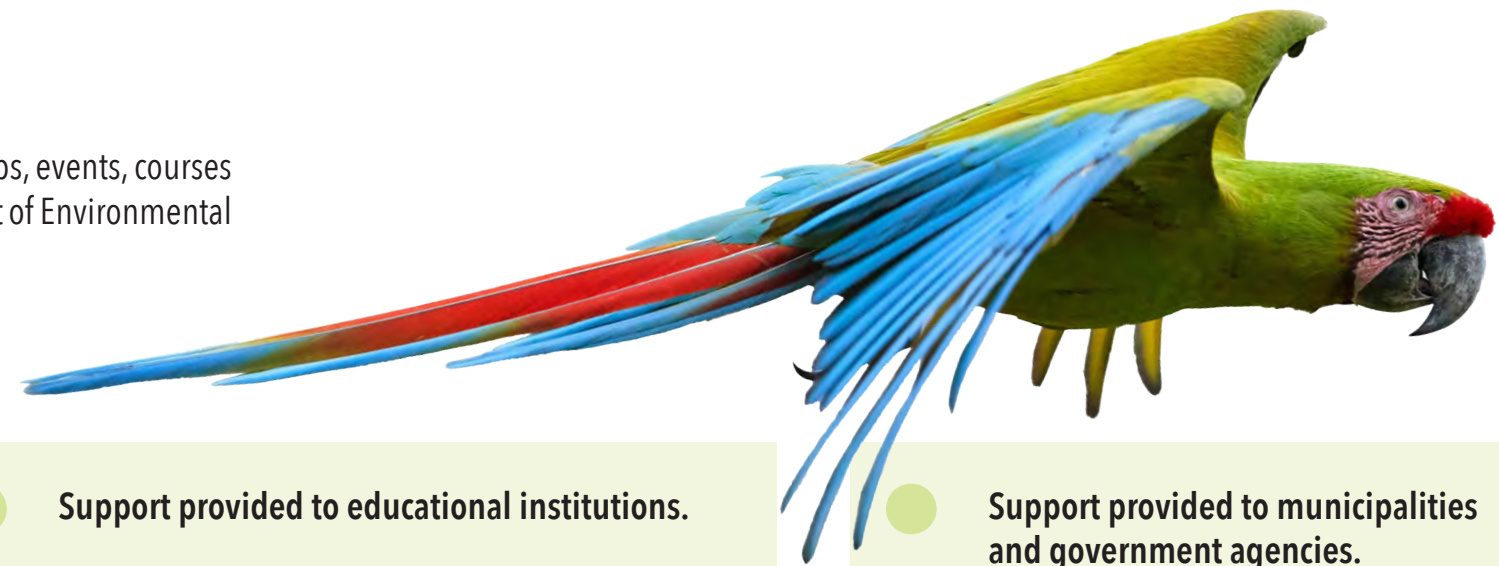




## 1.2.8. Environmental education

In 2020, the awareness of 4,465 people was raised through 504 activities such as workshops, events, courses and training for the conservation and care of the environment, facilitated by the Department of Environmental Education.

Some of the activities are listed below:



### Support and advice provided to companies and civil association organizations.

- Training courses for environmental advocates. The course was conducted in coordination with the UNAQ, and it was aimed at the administrative personnel of the UNAQ and other state, national and international education institutions. It had a duration of 24 hours divided into 12 sessions. A total of 27 individuals attended.



- Green Macaw Preservation Project. The municipalities of Peñamiller, Pinal de Amoles and Arroyo Seco, together with the CONANP and the United Corridors organization, carried out several actions, such as the donation of 11,000 pinyon pines and the coordination of a course about the importance of reforestation and connectivity, to promote the preservation of this endangered species.

- The edition and publication of 1,500 copies of a high-quality bilingual book (Spanish and English) about the protected natural areas of the State of Querétaro was backed with the objective of supporting efforts on the promotion about the importance of the preservation of natural protected areas in the State of Querétaro.

### Support provided to educational institutions.

- The first international congress on Environmental Education for Sustainability (EAS for its Spanish abbreviation) 2020 was carried out in conjunction with the State Commission for the Planning of Higher Education in Querétaro, the Polytechnic University of Santa Rosa Jáuregui (UPSRJ, Universidad Politécnica de Santa Rosa Jáuregui) and the Ministry of Sustainable Development (SEDESU). There were 125 academic events and the approximate attendance to the different activities carried out during the Congress was of 3,392 individuals.
- The Autonomous University of Querétaro (UAQ, Universidad Autónoma de Querétaro) received support as a sponsor of the 2020 Alejandrina Prize.

### Environmental Communication Strategy.

26 video conferences have been conducted with a total of 1,505 national and international attendees. The main subjects that have been covered are: biodiversity, climate change and the sustainable use of natural resources.

### Support provided to municipalities and government agencies.

Consulting and environmental awareness activities were provided in the 18 municipalities of the State; among these activities there were two educational courses about the importance of the preservation of the environment offered to the inhabitants of the Extóraz River Basin that live in the municipalities of Pinal de Amoles, Peñamiller and Arroyo Seco, where a total of 35 people attended.

Support was provided to the Ministry of National Defense (SEDENA for its Spanish acronym) for a project where 685,864 plants of 12 different species were to be planted and produced through the second stage of the project "Support for the production of plants in the State of Querétaro".

### Reforestation Activities.

81,340 trees were donated to institutions, companies, civil association organizations and schools. The species donated were white cedar, broad leaf privet, guava, pinyon pine, pomegranate, mesquite, among others.



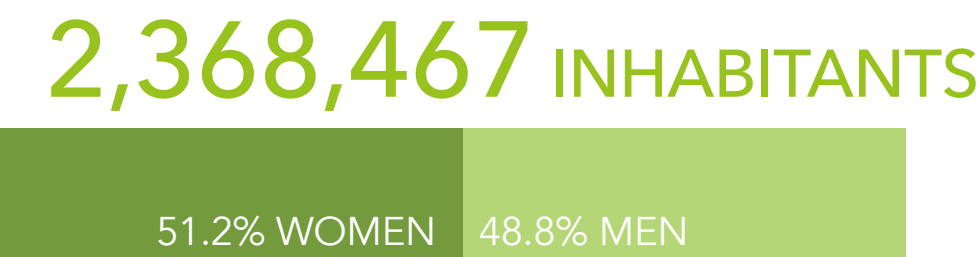
# 1.3. Sociodemographic

## 1.3.1. Population structure

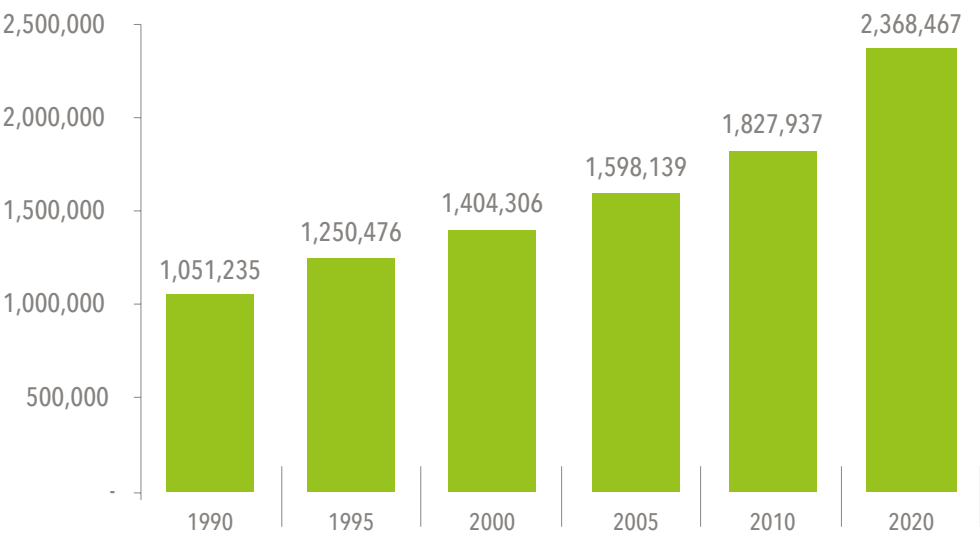
According to data from the 2020 Census of Population and Housing, the population amounts to 2,368,467 inhabitants in the entity, a figure that represents a growth of 29.6% compared to 2010, that is, 540,530 more people.

The Census establishes that, between 1990 and 2020, the total population of the state of Querétaro doubled from 1.05 to 2.37 million inhabitants.

In the state of Querétaro, 51.2% corresponds to 1,211,647 women and 48.8% corresponds to 1,156,820 men.



Population in the state of Querétaro, 1990-2020.



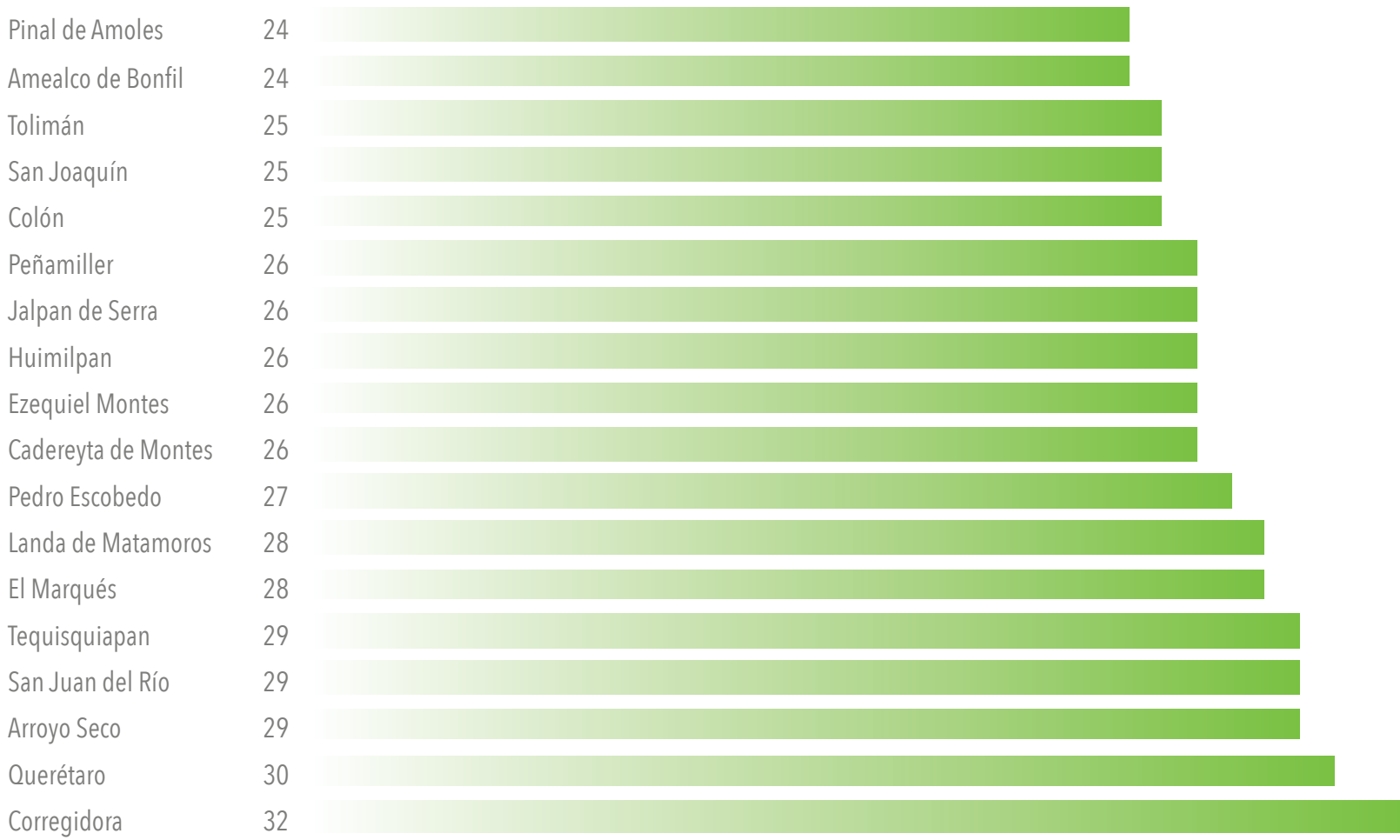
Source: XI 1990 General Census of Population and Housing. 1995 Population and Housing Count. XII 2000 General Census of Population and Housing. II 2005 Population and Housing Count. 2010 Census of Population and Housing. 2020 Census of Population and Housing. Consultation System for Territorial Integration (SCITEL for its Spanish abbreviation).

## Population dynamics in the entity

The 2020 Census of Population and Housing conducted by the INEGI indicates that the median age of the population in the state is 29 years, while in 2010 it was 25, and in 2000 it was 21. At the municipal level, this indicator fluctuates between 32 and 24 years. Only two municipalities are above the median age of the entity: Corregidora, and Querétaro.

29 YEARS  
MEDIAN AGE  
IN QUERÉTARO

Median age of the population, by municipality.

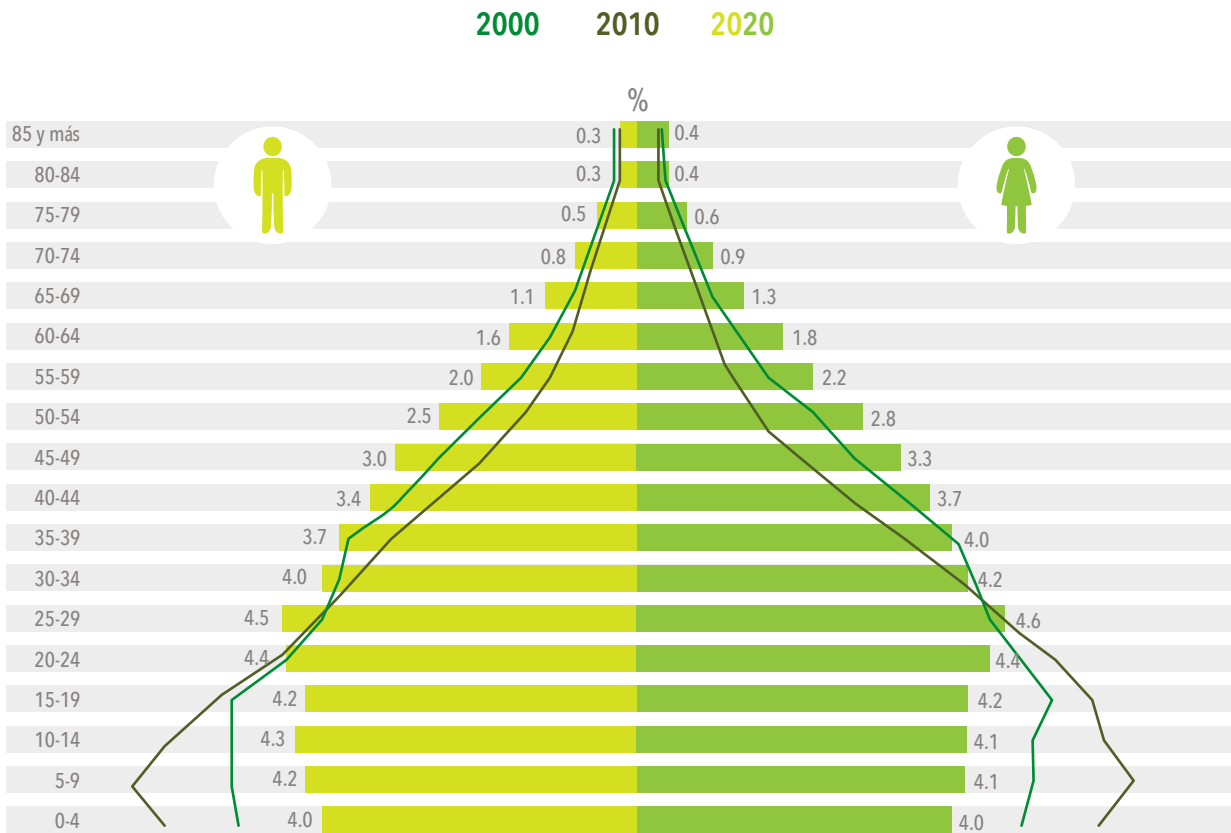


Source: National Statistics and Geography Institute. 2020 Census of Population and Housing.



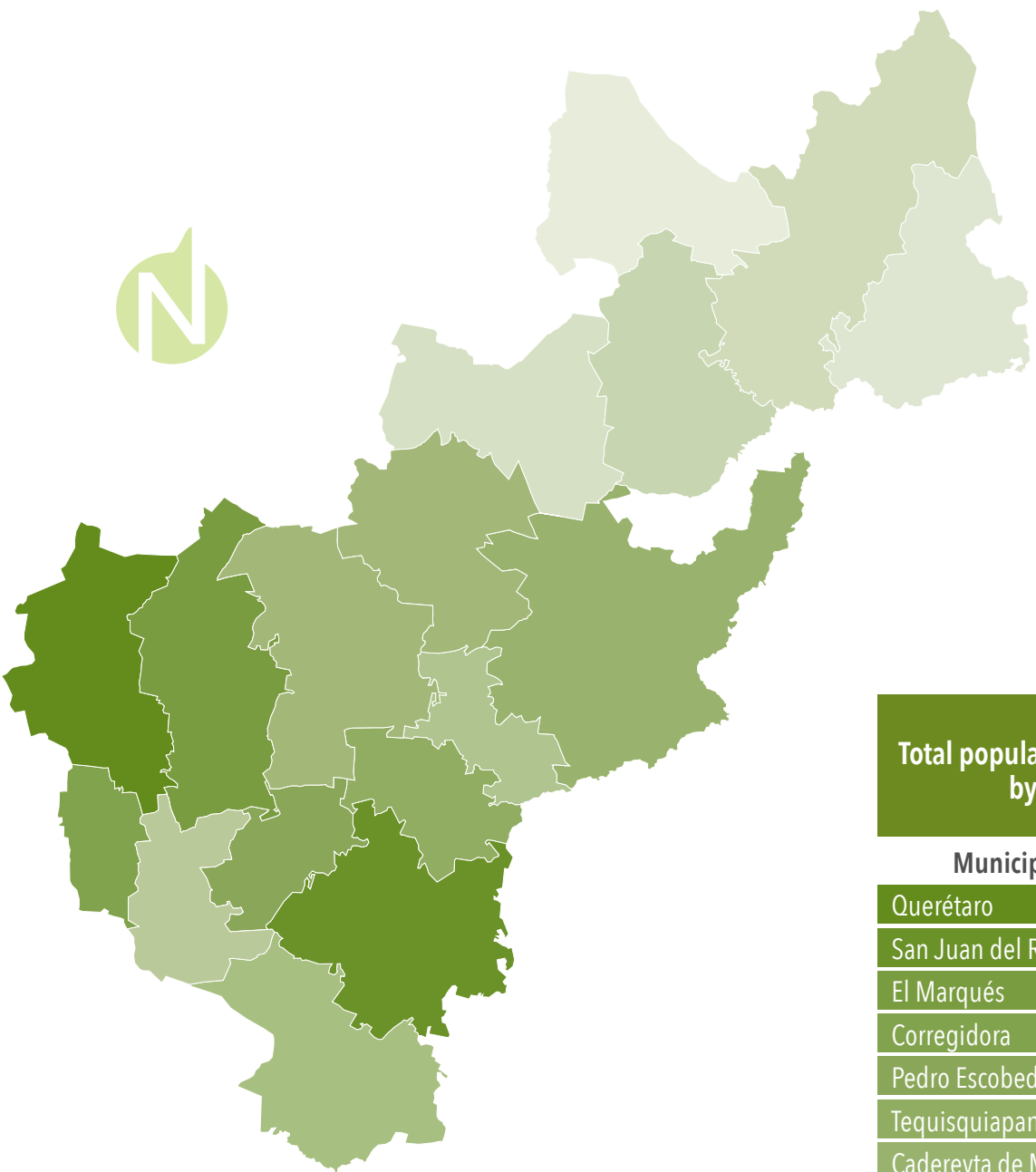


Population pyramid.



The population pyramid of Querétaro shows that in 2020 the population under 15 years of age represented 24.6% of the total; those of working age constituted 68.3%; and the elderly population constituted 6.7%.

In the 2020 population pyramid, a decrease of the base is observed compared to the years 2000 and 2010. For the year 2020, the age groups between 20 and 29 years are the most representative, which helps keep the state young.



Total population in the state of Querétaro, by municipality, 2020.

Municipality	Population
Querétaro	1,049,777
San Juan del Río	297,804
El Marqués	231,668
Corregidora	212,567
Pedro Escobedo	77,404
Tequisquiapan	72,201
Cadereyta de Montes	69,075
Colón	67,121
Amealco de Bonfil	66,841
Ezequiel Montes	45,141
Huimilpan	36,808
Tolimán	27,916
Pinal de Amoles	27,365
Jalpan de Serra	27,343
Peñamiller	19,141
Landa de Matamoros	18,794
Arroyo Seco	13,142
San Joaquín	8,359
<b>Total</b>	<b>2,368,467</b>

### Population dynamics in the municipalities

According to the 2020 Census of Population and Housing, there are 1,530,820 people living in the metropolitan area of Querétaro (64.6%): 1,049,777 in the municipality of Querétaro (44.3%); 212,567 in Corregidora (9%); 231,668 in El Marqués (9.8%); and 36,808 in Huimilpan (1.6%).

San Juan del Río is the second most populated municipality with 297,804 people (12.6%).

San Joaquín, with its 8,359 inhabitants (0.4%); Arroyo Seco with 13,142 people (0.6%); and Landa de Matamoros with 18,794 residents (0.8%) are the municipalities with the smallest population volumes.

Source: National Statistics and Geography Institute. 2020 Census of Population and Housing.



### 1.3.2. Birth and fertility

#### Gross birth rate

The gross birth rate indicates the number of live births per one thousand inhabitants in a certain year. For 2021 the expected gross birth rate is of 16.84 according to the number of births that occurred in the studied area. If compared to the 1990 rate of 32.74, the 2021 figure is 15.9 points lower according to the 2016-2050 projections.

#### Fertility rate

According to the 2016-2050 projections made by the National Population Council, an overall fertility rate of 1.99 children is expected for 2021, a figure which is considerably lower than the one from 1990 when a rate of 4.11 was recorded.



### 1.3.3. Morbidity

This is an important statistical data that provides information regarding the evolution or recession of any disease, the reasons for its emergence and the possible solutions.

#### Epidemiological Profile

Main causes of disease registered in Querétaro's health sector, 2019.		
Ailment	Total	Percentage
Acute respiratory infections	476,948	57.9%
Intestinal infections by other organisms and ill-defined ones	101,065	12.3%
Urinary tract infection	83,155	10.1%
Gingivitis and periodontal diseases	22,746	2.8%
Conjunctivitis	20,421	2.5%
Ulcers, gastritis and duodenitis	16,924	2.1%
Obesity	11,665	1.4%
Acute medium otitis	11,368	1.4%
Vulvovaginitis	10,169	1.2%
Transportation accidents in motor vehicles	8,582	1.0%
Domestic violence	6,783	0.8%
Arterial hypertension	6,509	0.8%
Non-insulin dependent diabetes mellitus (type II)	5,087	0.6%
Scorpion sting poisoning	4,800	0.6%
Influenza	3,642	0.4%
Peripheral venous insufficiency	3,125	0.4%
Chickenpox	2,992	0.4%
Burns	2,562	0.3%
Pneumonia and bronchopneumonia	2,366	0.3%
Other causes	22,696	2.8%
Total	823,605	100.0%

Source: Morbidity Yearbook 1984-2019. SSUIVE / DGE / Ministry of Health / United Mexican States 2019.



### 1.3.4. Mortality and life expectancy

Life expectancy is the average number of years that a specific population group lives in a certain period; it is influenced by various factors, such as the quality of medicine, hygiene and wars, among others.

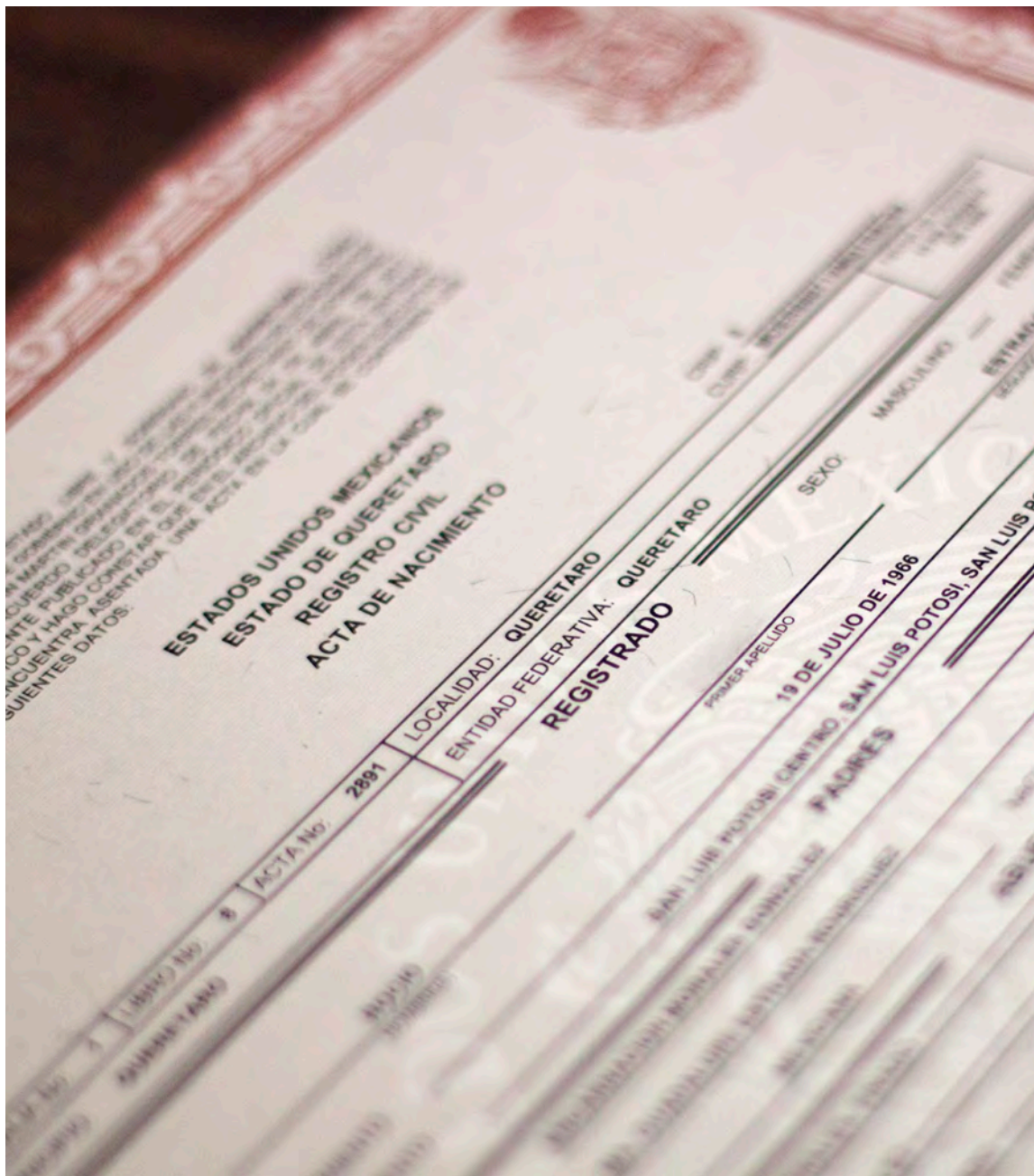
#### Gross mortality rate

According to CONAPO projections, during 2021 Querétaro is the fifth state with the lowest mortality rate (5.20 per one thousand, lower than the national rate of 6.13), ranking only below Quintana Roo, Baja California Sur, Baja California, and Aguascalientes.

#### Life expectancy

According to the 2016-2050 projections made by CONAPO, in the state of Querétaro the life expectancy of the total population is expected to be 75.8 years in 2021 and 77.04 years in 2030; women will reach the age of 78.8 years in 2021 and 80 years in 2030, while men will reach the age of 72.8 years and 74.1 years respectively.





### 1.3.5. Civil Registry

The registry acts in the state of Querétaro correspond to births, marriages, deaths, acknowledgments, divorces and adoptions.

During the year 2020, the number of applications carried out by the State Directorate of the Civil Registry registered a decrease of 6.9% compared to the previous year.

In the year of study, births represented 58.1% of total registrations, followed by deaths with 27.3%, marriages with 9.9%, divorces with 3.2%, acknowledgments with 1.4%, and lastly adoptions with 0.04%.

It is worth mentioning that, compared to 2010, registered births dropped by 18.7%, while divorces increased by 56.2%.

Annual indicators of acts and events of the civil status of people in the state of Querétaro.							
Year	Birth	Marriage	Death	Acknowledgement	Divorce	Adoption	Total
2010	40,843	8,078	8,122	1,259	1,183	2	59,487
2011	41,677	8,891	8,080	1,308	1,357	46	61,359
2012	41,534	9,149	8,628	1,382	1,403	84	62,180
2013	40,952	9,664	9,107	1,413	1,605	67	62,808
2014	40,950	9,694	9,349	1,302	1,516	44	62,855
2015	40,764	9,468	9,289	1,242	1,895	67	62,725
2016	39,628	9,100	10,203	1,243	2,119	25	62,318
2017	39,981	9,654	10,708	1,152	2,319	39	63,853
2018	38,547	8,685	10,948	1,128	2,426	36	61,770
2019	37,794	8,851	11,206	1,115	2,407	30	61,403
2020	33,225	5,631	15,626	815	1,848	21	57,166

Source: State Directorate of the Civil Registry.

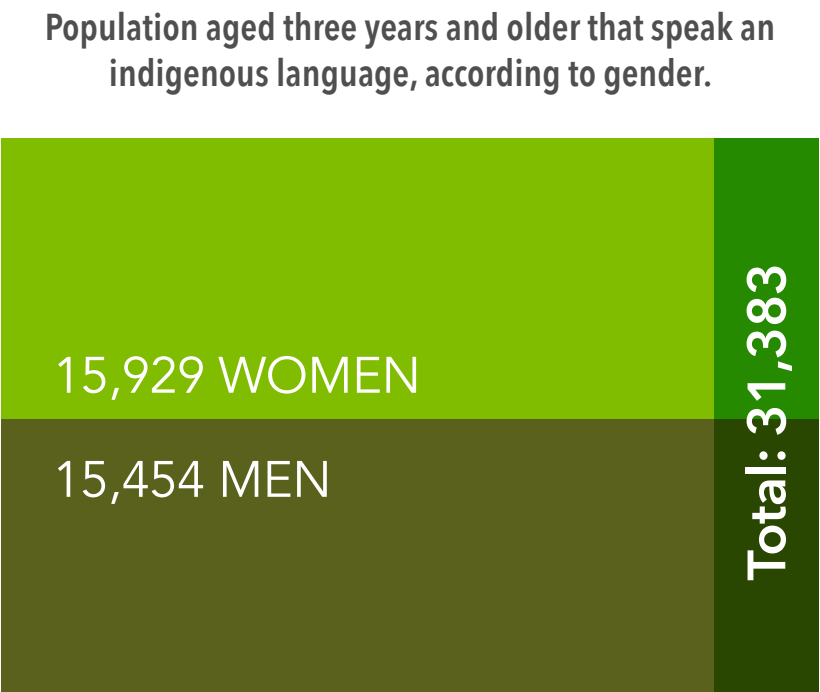


# 1.3.6. Indigenous communities

The state of Querétaro is a multicultural and multilingual entity due to the indigenous communities that inhabit it. These communities are characterized by their active citizen participation, constantly proposing strategies for the conservation of their languages, empowering their autonomy and their festivities, and the improvement of infrastructure, economy and education in their communities.

## Population representation of indigenous language speakers

There are currently 31,383 people aged three years and older who speak an indigenous language, of which 49.2% are male and 50.8% are female; together they represent 1.4% of the total state population. Nationwide, that age range increases to 6.1%. The main languages spoken are Náhuatl, Maya, Tselal, Tsotsil and Mixtec; the languages with less speakers are: Awakateko, Kickapoo, Ayapaneco, Kiliwa and Oluteco.



Source: National Statistics and Geography Institute. 2020 Census of Population and Housing.

## Level of instruction

Considering the latest available statistical data provided by the Basic Education Services Unit in the State of Querétaro (USEBEQ, for its Spanish abbreviation), it is observed that the total number of indigenous children in the municipalities of Amealco de Bonfil, Cadereyta de Montes, Colón, Ezequiel Montes and Tolimán enrolled in the 2019-2020 school year amounted to 2,895 students and 1,199 graduates thanks to the participation of 143 teachers in 84 schools.

The 2020-2021 school year added a total of 6,098 indigenous-language-speaking students enrolled in basic, high school and university education. Out of the total enrolled students, 43.4% are in elementary school.

Enrolled, existing and graduated students, teaching staff and schools in indigenous preschool at the end of courses by municipality. 2019-2020 school year.						
Municipality	Amealco de Bonfil	Cadereyta de Montes	Colón	Ezequiel Montes	Tolimán	Total
Enrolled students <sup>2</sup>	1,220	563	28	214	870	2,895
Existing students <sup>1</sup>	1,235	578	26	219	868	2,926
Graduated students <sup>1</sup>	571	238	13	81	296	1,199
Teaching staff <sup>2</sup>	57	32	2	11	41	143
Schools <sup>2,3</sup>	28	23	1	7	25	84

Source System F911 for the national educational statistical integration of the SEP. Ministry of Education of the State Government. Basic Education Service Unit in the State of Querétaro. Subcoordination of Administrative Management. Directorate of Educational Planning. Statistics Department.

Note: Indigenous preschool is the educational service provided to indigenous children between the ages of three and six to teach them the Spanish language before entering elementary education. It serves as a preschool education like the one taught in kindergardens.

<sup>1</sup> Existing students and graduates reported in the F911 statistical entry at the end of the 2019-2020 cycle of October 2020.

<sup>2</sup> Enrolled students, teaching staff and schools reported in the F911 statistical entry at the beginning of the 2019-2020 cycle of October 2019.

<sup>3</sup> The quantification of schools is expressed through the shifts offered by the same campus and not in terms of physical facilities.

## Family economy

The main productive vocations in indigenous communities are livestock activities with cattle, goats and sheep, pottery, mining, fish farming, handicraft production, and corn and apple production.

An important factor is the development of self-consumption activities such as agriculture of basic crops, poultry and fish farming.

Enrollment of students who speak indigenous languages in different educational levels. 2020-2021 school year.					
Municipality	Preschool	Elementary	Junior High	High School	University
Amealco de Bonfil	331	1846	719	245	
Arroyo Seco	0	2	0	6	
Cadereyta de Montes	110	319	34	34	1
Colón	0	1	0	5	58
Corregidora	51	1	0	19	
El Marqués	0	31	1	68	
Ezequiel Montes	72	114	0	21	
Huimilpan	0	0	0	2	
Jalpan de Serra	0	4	2	10	
Landa de Matamoros	0	0	0	14	
Pedro Escobedo	0	3	0	3	
Peñamiller	42	0	0	1	
Pinal de Amoles	30	0	0	10	
Querétaro	73	108	0	158	343
San Joaquín	0	0	0	4	
San Juan del Río	160	1	0	80	4
Tequisquiapan	1	1	1	18	
Tolimán	183	214	273	266	
Total	1,053	2,645	1,030	964	406

Source: F911 system for the national educational statistical integration of the SEP. Ministry of Education of the State Government. Basic Education Service Unit in the State of Querétaro. Subcoordination of Administrative Management. Directorate of Educational Planning. Statistics Department.



1.3.7. Migration

Migration is considered as one of the components that affect the dynamics of the population regarding growth and composition by gender and age. For years, Querétaro has been considered as an attractive state for migrants.

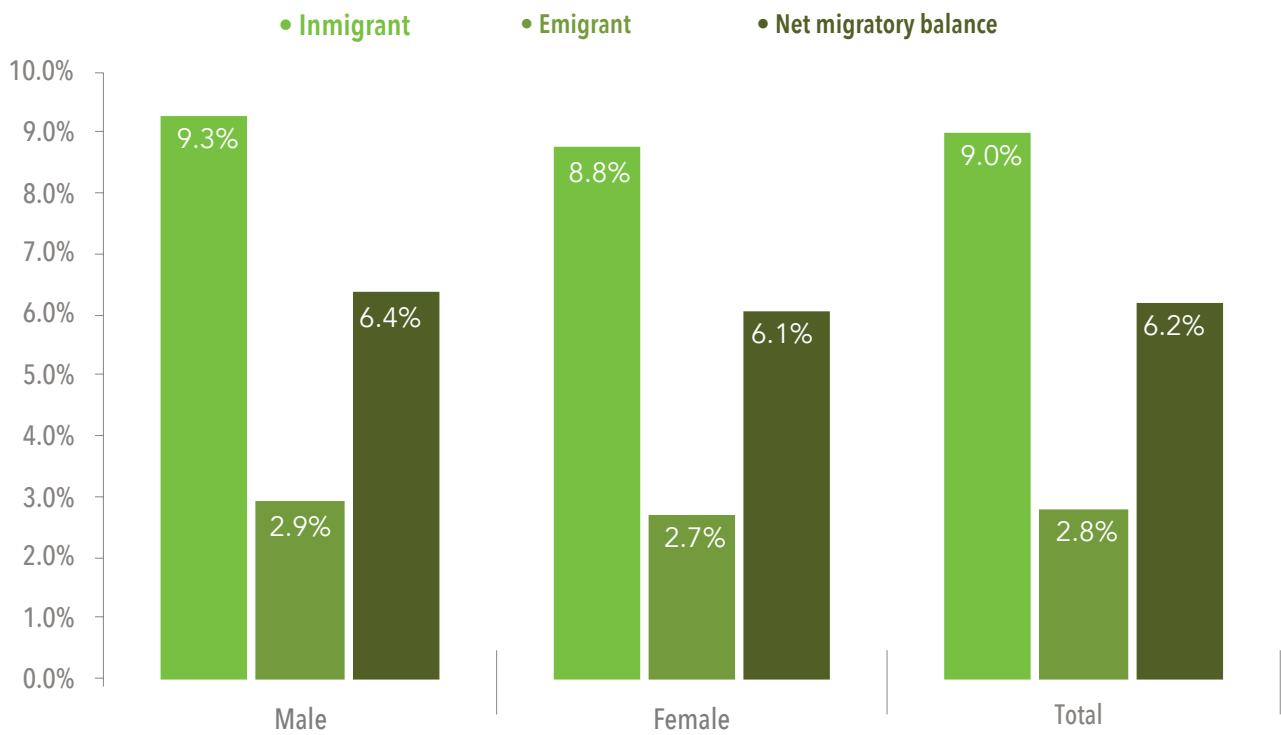
Migratory phenomenon

Information from the 2020 Census of Population and Housing shows that, from 2015 to 2020, the percentage of the population that arrived in Querétaro was 9%, while 2.8% left the entity, resulting in a net migratory balance (SNM for its Spanish abbreviation) of 6.2% which places the state in the third place nationwide.

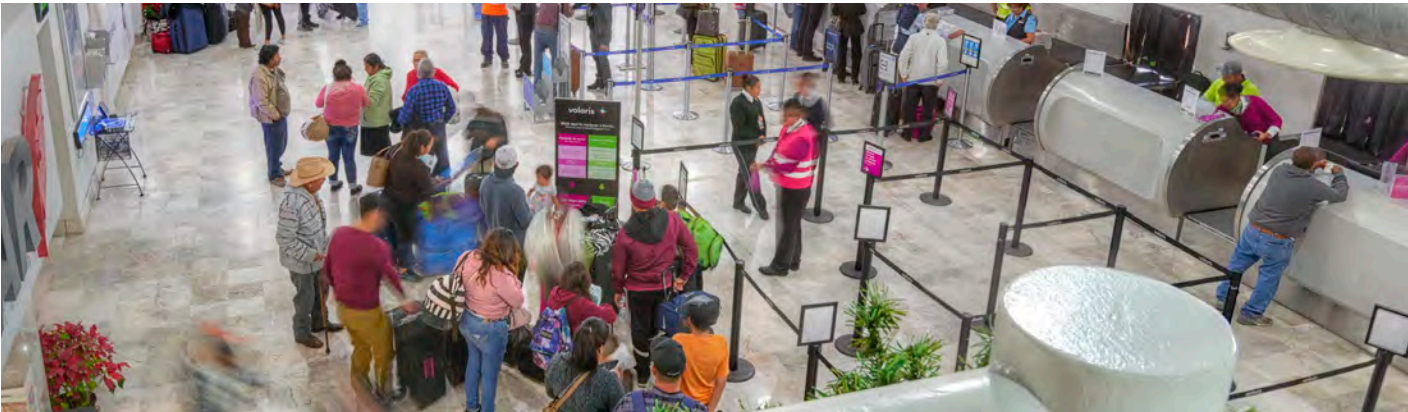
Municipalities with high migration

The municipalities with the highest percentage of population born in another entity or abroad are Corregidora and Querétaro with 43.8% and 37.0% respectively; followed by El Marqués with 36.6% and San Juan del Río with 28.9%.

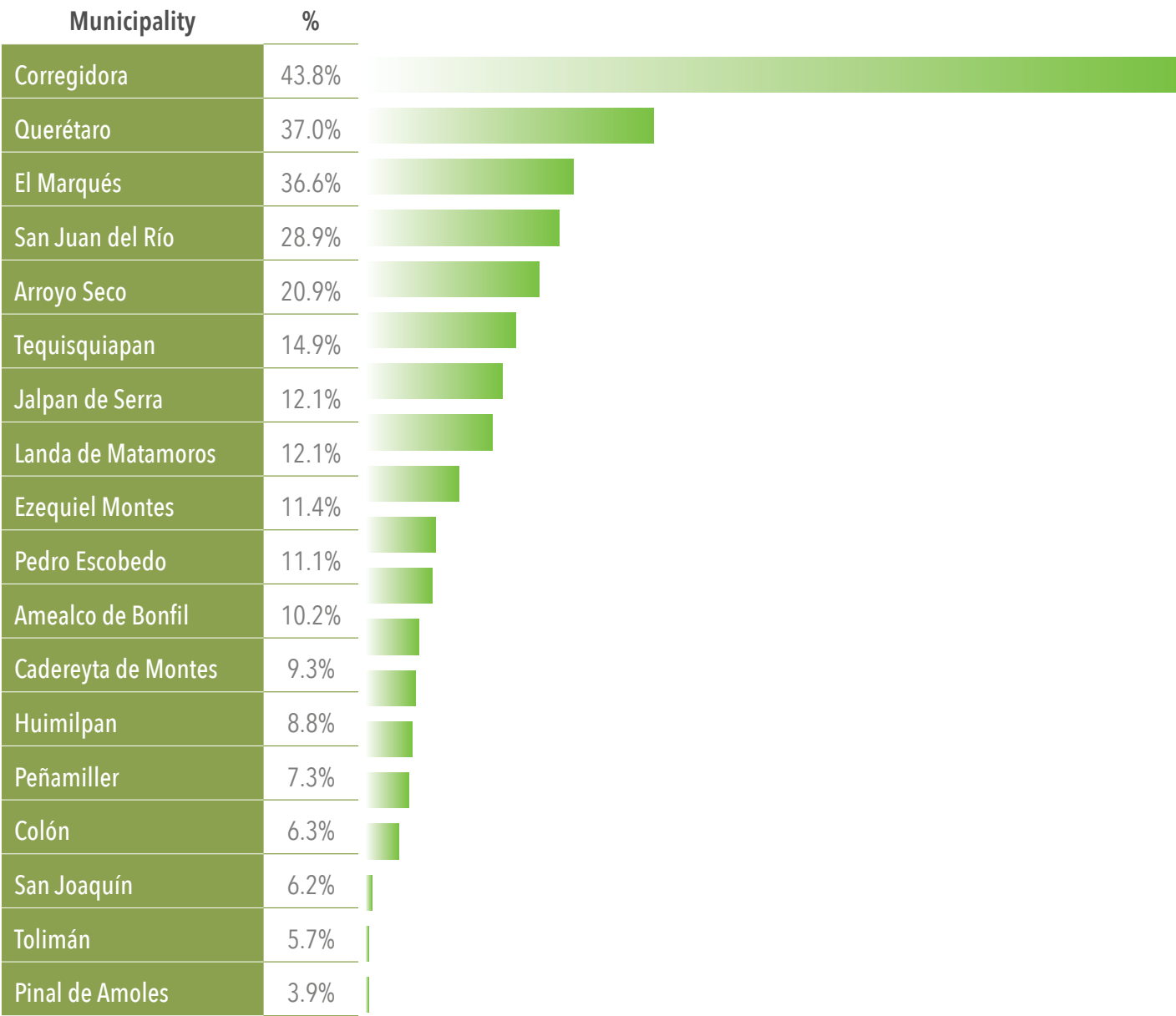
Percentage of immigrants, emigrants and net internal migratory balance per gender, in the state of Querétaro, 2015-2020.



Source: National Statistics and Geography Institute.2020 Census of Population and Housing.



Percentage of the population born in a different entity or country, by municipality.



Source: National Statistics and Geography Institute.2020 Census of Population and Housing.





### Interstate and international migration

Pursuant to the 2016-2050 projection made by CONAPO, 26,521 interstate immigrants, 8,601 emigrants, 2,436 international immigrants, and 7,800 international emigrants are expected in 2021.

### Remittances

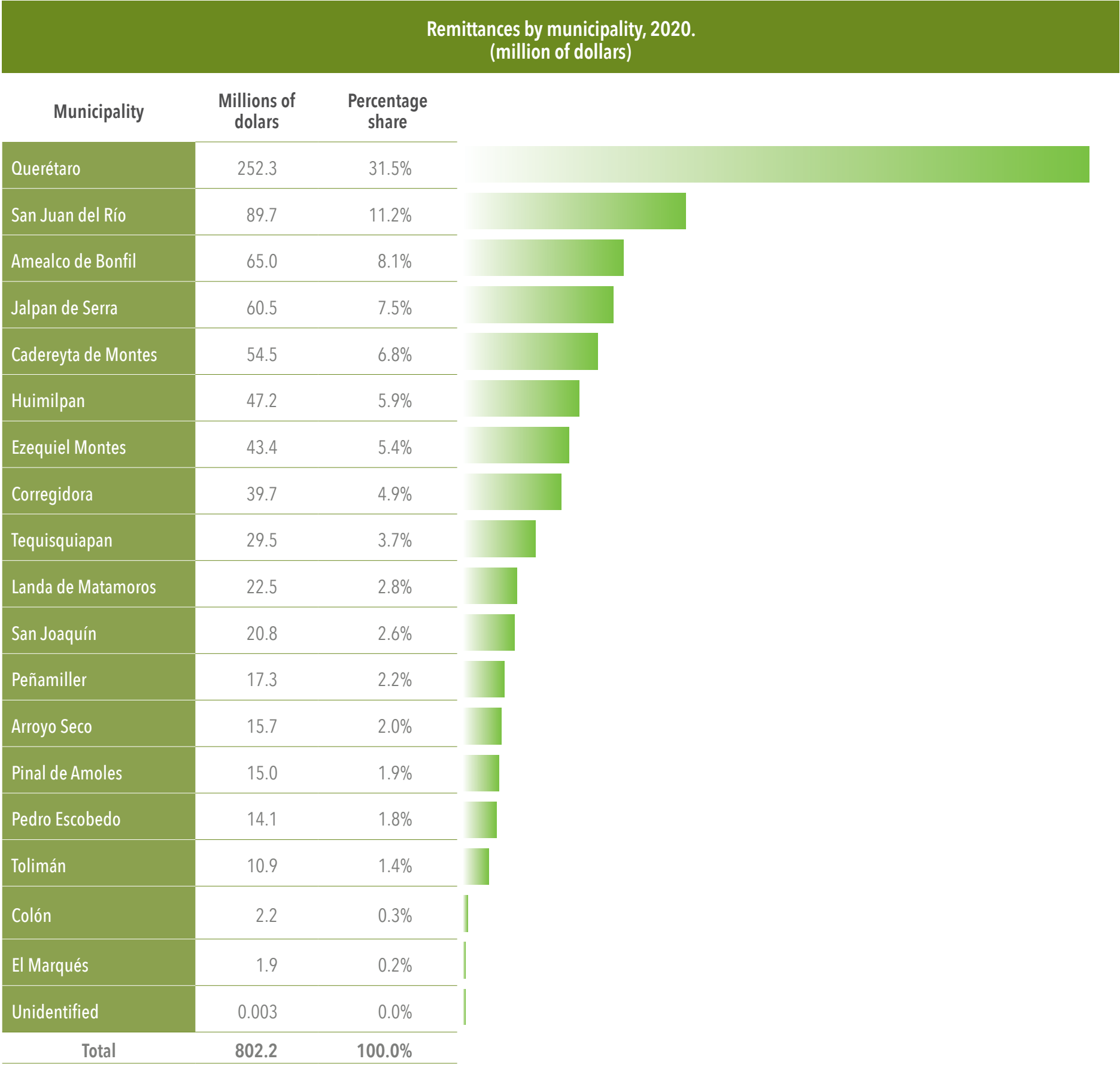
The income received in Mexico from remittances has registered a high dynamism in recent years. At the end of 2020 remittances amounted to 40,606.6 million dollars, a figure that is 11.4% higher than the previous year.

Half of the income coming from remittances goes into 7 states: Jalisco, Michoacán, Guanajuato, State of Mexico, Mexico City, Guerrero and Oaxaca.

The importance of this income for the Mexican economy is significant considering that it is an important source of foreign currency.

On this front, Querétaro ranks 20th place, with an income of 802.2 million dollars, which is 2% of the total remittances received in the country.

The municipalities with the highest income from remittances were: Querétaro, San Juan del Río, Amealco de Bonfil, Jalpan de Serra and Cadereyta de Montes.



Source: Bank of Mexico (BANXICO). Economic Information System. Income from remittances, distribution by municipality. 2021.  
Note: the remittance figures are preliminary and are subject to subsequent revisions







Globalization has led to a modification of spaces that has brought upon a restructuring of the economic activities so that they can respond to this new context in a competitive way. There are major challenges currently being faced, but they also represent new opportunities for the development of entities.

It is fundamental to reinterpret infrastructure and utilities when it comes to the development of a region. These elements must go hand in hand with the restructuring of productive systems through innovation, training and participation from all the parties involved.

It is essential for the government to provide the necessary infrastructure and utilities to support the growth of the entity's competitiveness, an action that will translate into an increased level of well-being for its population.

# INFRASTRUCTURE AND UTILITIES

187 POTABLE WATER  
SYSTEMS

291 SUPPLY  
SOURCES

5 POTABLE WATER TREATMENT PLANTS  
WITH A JOINT INSTALLED CAPACITY OF

1,599.5 LITERS PER  
SECOND

1,177.1 KILOMETERS  
OF STATE ROADS

520 KILOMETERS  
OF RAILROADS

509,098  
PASSENGERS  
USING THE AIQ

INCREASED FROM 5 TO 22 DESTINATIONS CONNECTING  
MÉXICO AND THE UNITED STATES  
(2015-2019)

3<sup>TH</sup> DOMESTIC CARGO  
TRANSPORTATION  
AIQ | INTERNATIONAL AIRPORT OF QUERÉTARO

5<sup>TH</sup> INTERNATIONAL CARGO  
TRANSPORTATION

32 OPERATIONS  
PER HOUR  
CAPACITY  
TO RECEIVE

7<sup>TH</sup> RANKING POSITION  
NATIONWIDE  
IN TERMS OF NUMBER  
OF OPERATIONS

"SAFE TRAVELS" SEAL  
INTERNATIONAL ACCREDITATION OF PROTOCOLS FOR  
THE PREVENTION OF SPREAD AND CONTAGION OF  
COVID-19 AT AIQ



# 2.1. Urban development and housing

## 2.1.1. Urban development

### Urban development programs

During the year 2020, there were 2 urban development programs, the Municipal Program for the Urban Development of Colón and the Municipal Program for the Urban Development of Tolimán.

According to what is set forth in Article 44 of the General Law of Human Settlements, Territorial Planning and Urban Development, legal opinions regarding the congruence of the following 6 programs were issued during this period:

El Marqués:

- Municipal Program for the Urban Development of El Marqués
- Municipal Program for the Urban Development Zona Norte
- Municipal Program for the Urban Development of Chichimequillas
- Municipal Program for the Urban Development of Cañada-Saldarriaga
- Municipal Program for the Urban Development Circuito Universidades
- Municipal Program for the Urban Development Oriente

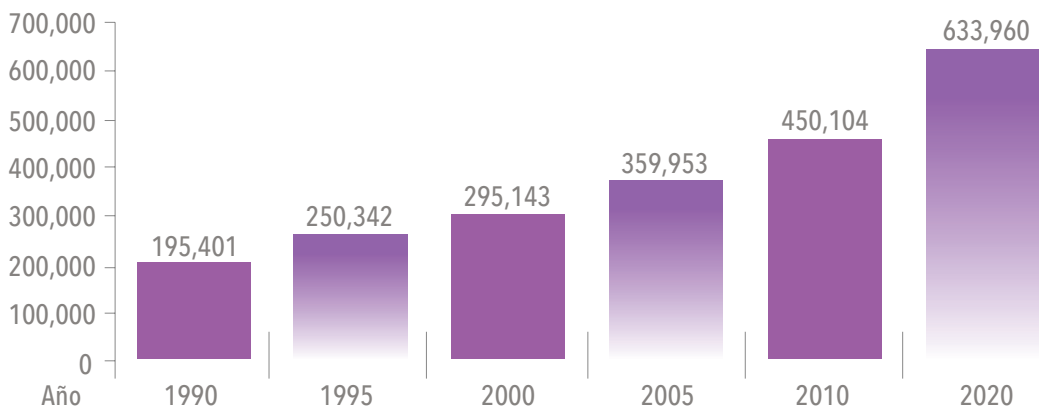


## 2.1.2. Occupied dwellings

The number of private occupied dwellings is predominant; it is in this type of dwelling in which the majority of the state's population resides.

According to the 2020 Census of Population and Housing, it is estimated that there are 633,960 private dwellings, a figure 41% greater than that of 2010, when it amounted to 450,104. In absolute terms this number has increased by 183,856 units in the last ten years.

Number of private occupied dwellings in Querétaro, 1990-2020.



Source: National Statistics and Geography Institute (INEGI). XI General Population and Housing Census 1990. Population and Housing Count 1995. XII General Census of Population and Housing 2000. II Population and Housing Count 2005. 2010 Census of Population and Housing. 2020 Census of Population and Housing. Territorial Information Consultation System (SCITEL).

By the year 2020, there was an average of 3.5 occupants per private occupied dwelling in contrast with that figure from 1995, which was of 5.4 occupants per dwelling.

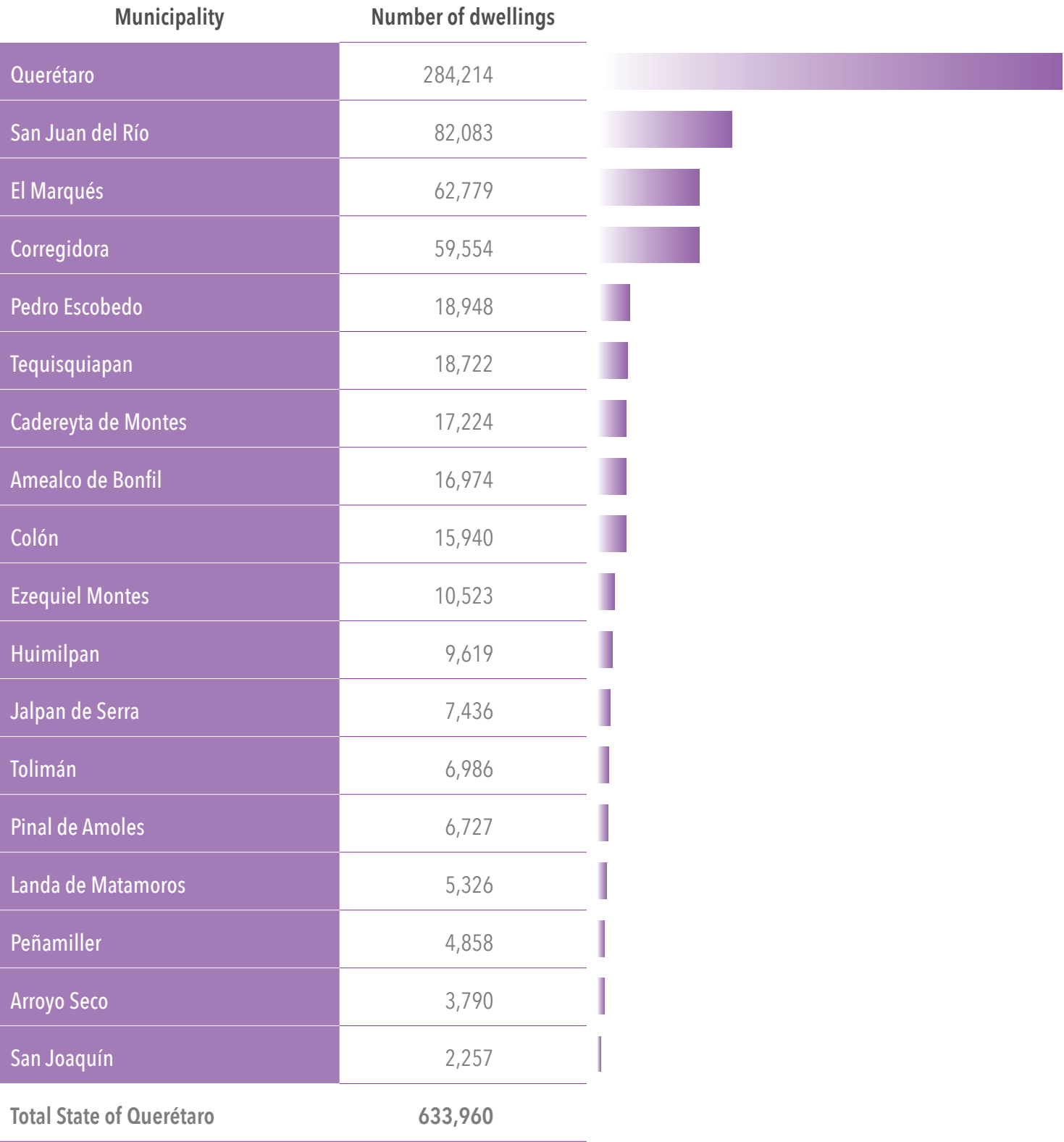
The municipalities with the largest number of private occupied dwellings are: Querétaro, San Juan del Río, Corregidora and El Marqués. Altogether, these four municipalities concentrate 488,630 units which account for 77.1% of the total housing in the entity.





Since the year 2000, electricity has been one of the most important basic services provided to homes in the entity. By the year 2020, the electrical supply coverage had been increased in order to reach 99.2% of the homes in Querétaro.

Querétaro is the municipality with the highest percentage of homes that have this service, reaching 99.9%, followed by Corregidora with 99.8% and El Marqués and San Juan del Río with 99.6%. In contrast, the municipality of Pinal de Amoles shows the lowest percentage of homes covered by this service.



Source: National Statistics and Geography Institute (INEGI). 2020 Census of Population and Housing. Territorial Information Consultation System (SCITEL).



# 2.2. Hydraulic

## 2.2.1. Hydraulic Infrastructure of the State Water Commission (CEA)

Pursuant to Article 21 of the Urban Code of the State of Querétaro, the State Water Commission (CEA for its Spanish abbreviation) is the coordinating and assisting agency in the planning, study, design, construction and operation of the systems and facilities for potable water, sewage, sanitation and disposal of wastewater and treated waters, as well as the services related to them.

### Demand for potable water

Querétaro's economic development, in addition to the substantial growth in population, has represented a challenge for the CEA in terms of being able to guarantee a supply of potable water for the population both in the present and the future.

In order to face up to this issue, the CEA promotes an efficient and rational use of potable water, raising awareness on the value of water among the citizens.



### Transmission and distribution networks

At the end of 2019 the CEA had over 2,060 kilometers of transmission lines and almost 7,579 kilometers of distribution networks.

Regarding the distribution of transmission lines, 85% are located within the state, and the remaining 15% in the metropolitan area of the city of Querétaro.

Overview of the situation of potable water in the state of Querétaro, 2019.

Category	Total
Treatment coverage (%)	87.84
Neighborhoods supplied	1,696
Transmission lines (kilometers)	2,060
Localities supplied	1,054
Supply sources	291
Potable water supply systems	187
Storage tanks	952
Residential connections to water supply	443,970
Industrial connections to water supply	718
Commercial connections to water supply	19,463
Production (liters per second)	5,045.16
Distribution network (kilometers)	7,579
Average daily extraction volume (m³)	25,641

Source: State Water Commission (CEA), 2020.





## 2.2.2. Hydraulic infrastructure Municipal Commission for Potable Water and Sewage Systems (JAPAM)

### Potable water treatment plants

According to the CEA, in 2019 Querétaro had five potable water treatment plants with a combined installed capacity of 1,599.5 liters per second.

Potable water treatment plants in operation in the state of Querétaro, 2019.			
Municipality	Potable water treatment plants	Installed capacity (liters per second)	Annual volume of potable water supplied (millions of m³)
Cadereyta de Montes	Acueducto II	1,500	38.8
Jalpan de Serra	Jalpan y Tancoyol	70	1.4
Pinal de Amoles	Chuveje	25	1.3
San Joaquín	Aguacatillo	4.5	0.3
Total	5	1,599.5	41.9

Source: State Water Commission, 2020.  
m³: cubic meters

The Municipal Commission for Potable Water and Sewage Systems (JAPAM for its Spanish abbreviation) is the decentralized public entity that manages the municipal potable water and sewage systems in San Juan del Río, Querétaro. Among the most relevant data, the following is observed:

Overview of the situation of potable water in the municipality of San Juan del Río, Qro.	
Distribution piping (km)	1,085.40
Transmission piping (km)	132.74
Wells in operation	39
Daily production (liters per second)	746.17
Average volume extracted daily (m³)	1,653
Residential connections to water supply	82,879
Industrial connections to water supply	345
Commercial connections to water supply	4,026

Source: Municipal Commission for Potable Water and Sewage System (JAPAM), 2020.





## 2.3. Energy Sector

### 2.3.1. National Electric System

The National Energy Control Center (CENACE for its Spanish acronym) is the decentralized public entity that handles the operational control of the National Electric System, maintains the operation in the Wholesale Electricity Market and guarantees objectivity in the access to the National Transmission Network and the General Distribution Networks.

The process involves the following stages: the generation of electric energy, the transmission through sets of electric towers, the distribution through the system of electrical substations, and the delivery of electricity to end users.

According to the Development Program for the National Electric System (PRODESEN for its Spanish acronym) 2020-2034, a total of 317,820 GWh of electric energy were generated in 2019. From the electric energy generated, 76.5% comes from conventional technologies (243,247 GWh) and the remaining 23.5% from clean technologies (74,573 GWh).

#### Federal Electricity Commission

The Federal Electricity Commission (CFE for its Spanish abbreviation) is a state-owned company that generates, transmits, distributes and markets electricity; it is a decentralized public entity, with civil standing and capacity and an independent patrimony.

Nationwide, the National Electric System has 10 Regional Control Centers that reported a total production of 70,053 MW in 2018, which include the electric centrals that belong to the CFE, the Independent Energy Producers (IEP), and the rest of the permit holders. This represented an increase of 3.1% compared to 2017 (67,958 MW).

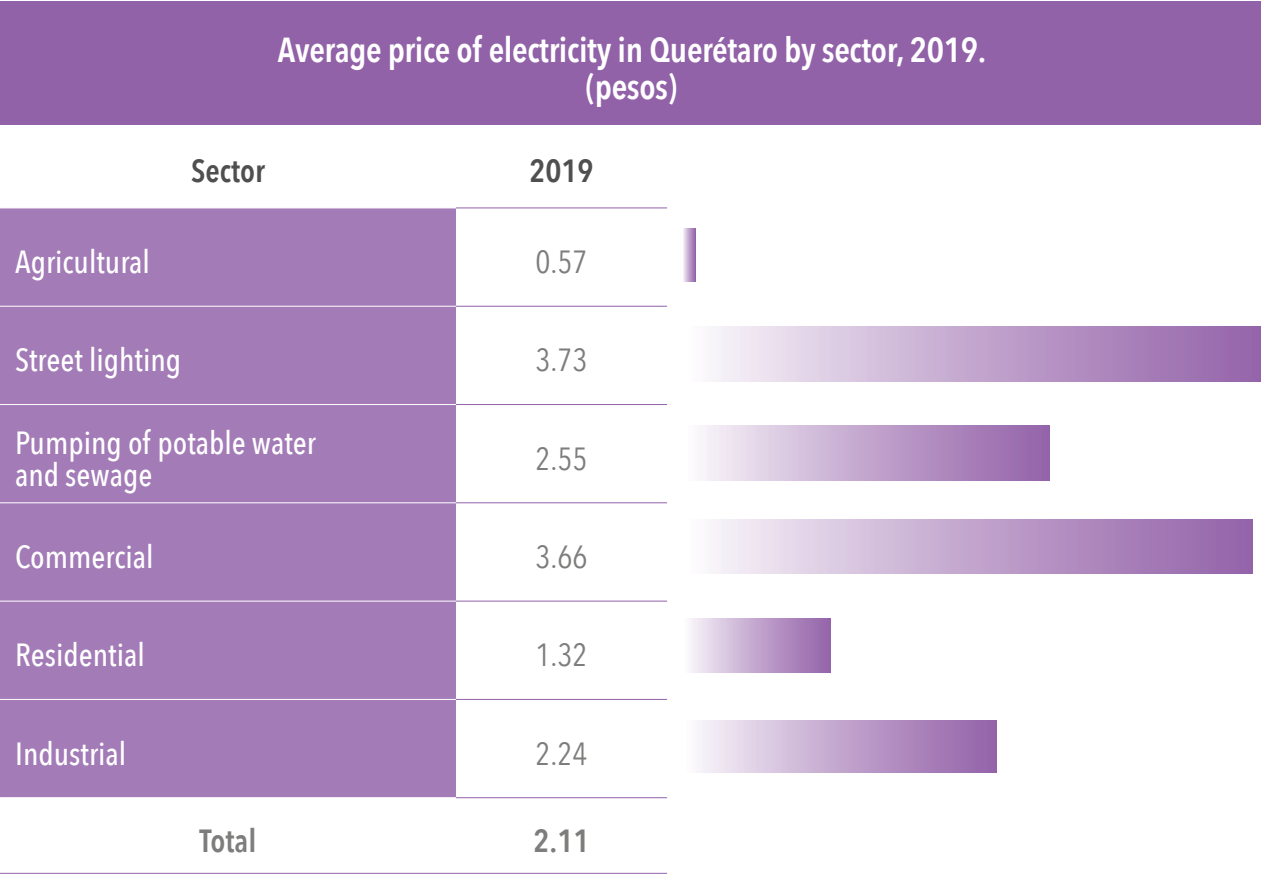
The CFE has thermoelectric, hydroelectric, coal-fired, geothermoelectric, and wind-powered plants, and one nuclear power plant.

The CFE Bajío Division, Querétaro Area, has 622.025 kilometers of transmission lines and 7,579.14 distribution networks.



#### Electricity prices

According to 2019 data, the CFE reported the average price of electricity for the state of Querétaro at 2.11 pesos per consumed kW. Prices had variations according to their sector of consumption, where the highest ones were those for the street lighting and commercial sectors.



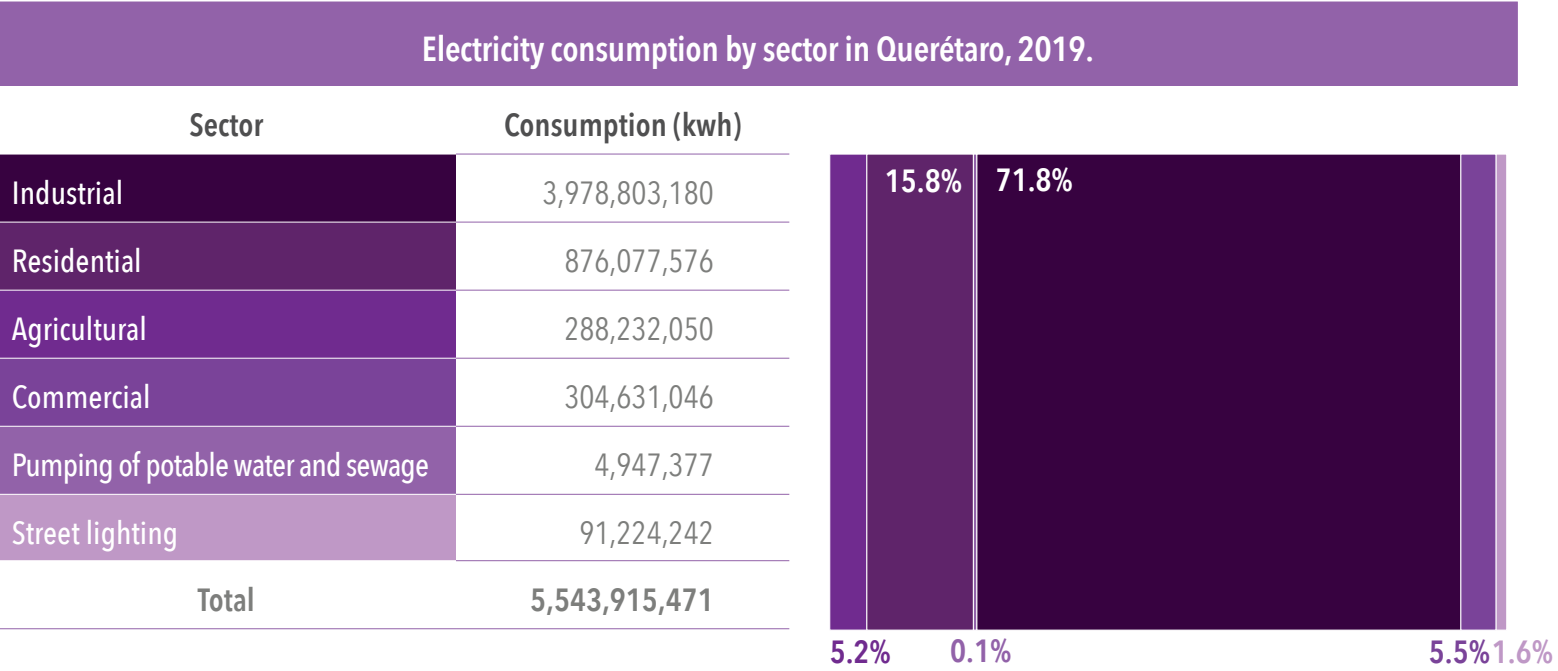
Source: Federal Electricity Commission. Bajío Distribution Division, 2020.





Consumption by sector

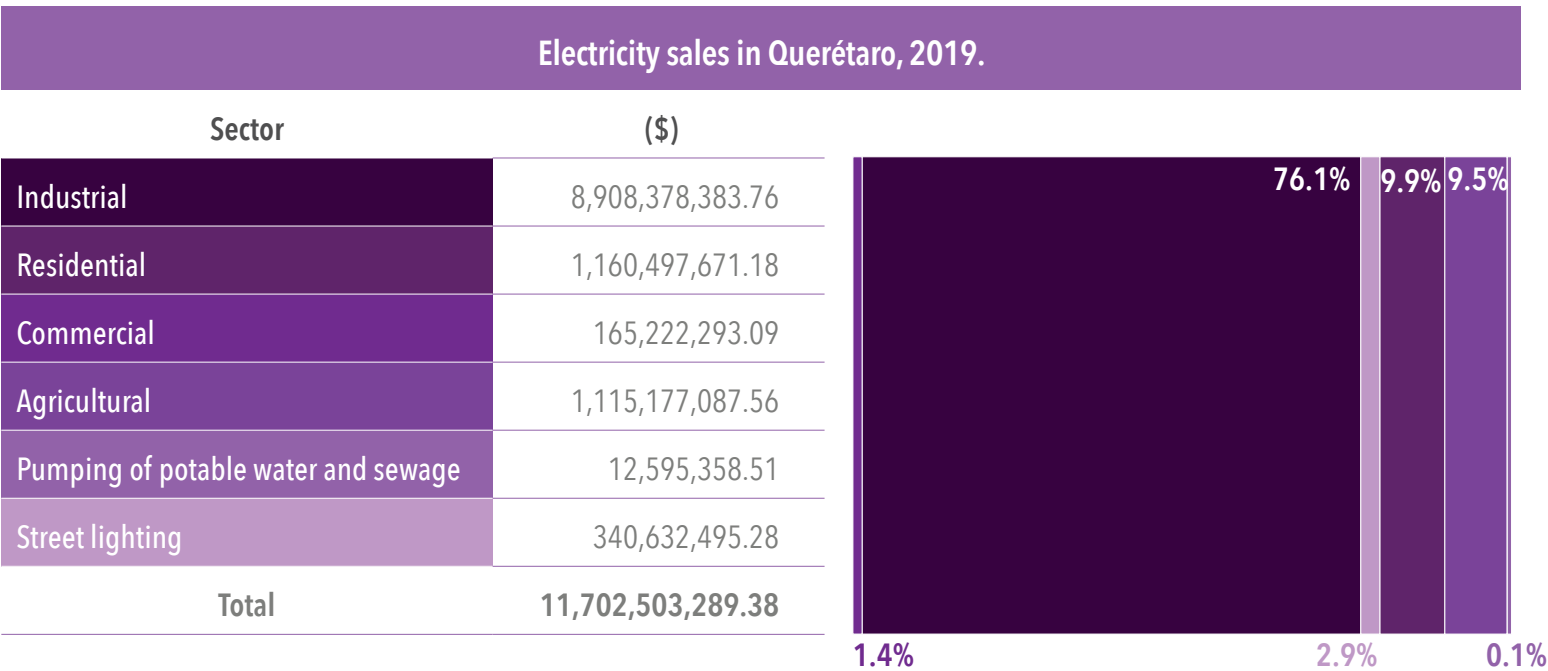
In 2019, the entity reported a total consumption of 5,543,915,471 kilowatts per hour distributed by sector as follows:



Source: Federal Electricity Commission. Bajío Distribution Division Querétaro Area, 2020.  
kwh: kilowatt per hour.

Sales by sector

In 2019, sales of electricity in the state amounted to 11,702,503,289 pesos in the following sectors:



Source: Federal Electricity Commission. Bajío Distribution Division Querétaro Area, 2020.



## 2.3.2. Natural gas

As an alternate energy source, natural gas is having a growing participation in world markets and its demand is expected to continue growing in the years to come.

### Urban consumption

According to the information provided by the company ENGIE México (MaxiGas), in 2020 the urban consumption of natural gas in the state of Querétaro totaled 1,538,012 gigajoules. This represented an annual increase of 1%. From the total consumption, 80% comes from residential customers and 20% from commercial ones.

There were 283 km of steel networks in operation at 21 bar and 1,363 kilometers of polyethylene networks at approximately 4 bar.

Urban consumption of natural gas in the state of Querétaro, 2018 to 2020.

Customers	2018	2019	2020
Residential	1,124,288.85	1,143,446.82	1,237,349.00
Commercial	365,365.60	382,212.74	300,663.10
<b>Total</b>	<b>1,489,654.01</b>	<b>1,525,659.56</b>	<b>1,538,012.10</b>

Source: ENGIE México, Querétaro Region 2021.  
Note: the measurement unit is gigajoules.





# 2.4. Roads and Communication



Distribution of the state road network by region, 2020.

Region	Kilometers	Percentage distribution
Center	155.5	13.2
Semi-desert	475.0	40.4
Sierra Gorda	256.5	21.8
South	290.1	24.6
Total	1,177.1	100.0

Source: State Infrastructure Commission, 2021.

The roads in the state of Querétaro are distributed into the following regions:

## 2.4.1. Road infrastructure

Depending on their importance and characteristics, Mexican road networks are classified as: federal, state, rural and improved roads.

Querétaro is located in the roadway junction that connects the Metropolitan Area of the Valley of Mexico City with Nuevo Laredo in the south-north direction and in the east-west direction. The entity is located in the central part linking the Gulf of Mexico with the Pacific Ocean. This gives it a leading role in the strategies for development and connectivity with important markets.

Road infrastructure in the state of Querétaro.

Type of road	Kilometers
Toll-free federal road	556.5
Federal road with toll	173.1
State road	1,177.1
Rural roads	1,240.0
Total	3,146.7

Sources: State Infrastructure Commission and SCT Center Querétaro, 2021.  
Note: the kilometers of toll-free federal roads and federal roads with toll correspond to the year 2019, the kilometers of rural roads correspond to the year 2018 and the kilometers of state roads correspond to the year 2020.



### Road network

According to data from the State Infrastructure Commission (CEI for its Spanish abbreviation) and the Ministry of Communications and Transport (SCT for its Spanish abbreviation), 3,146.7 km of roadways integrate the road network of the state of Querétaro.

According to the information provided by the Ministry of Communications and Transport, the entity has 31 roads. Some of the sections are part of toll-free or toll federal road networks, and others are part of the federal network which consists of both toll-free and toll sections. The rest of the roads are part of the toll-free state network.

Federal highways 45 and 57, considered as Mexico's most important roadways, go through the state of Querétaro. This road infrastructure places the entity in a position of interconnection and distribution for vehicle transit, whether private, touristic or cargo, towards various destinations in the country.

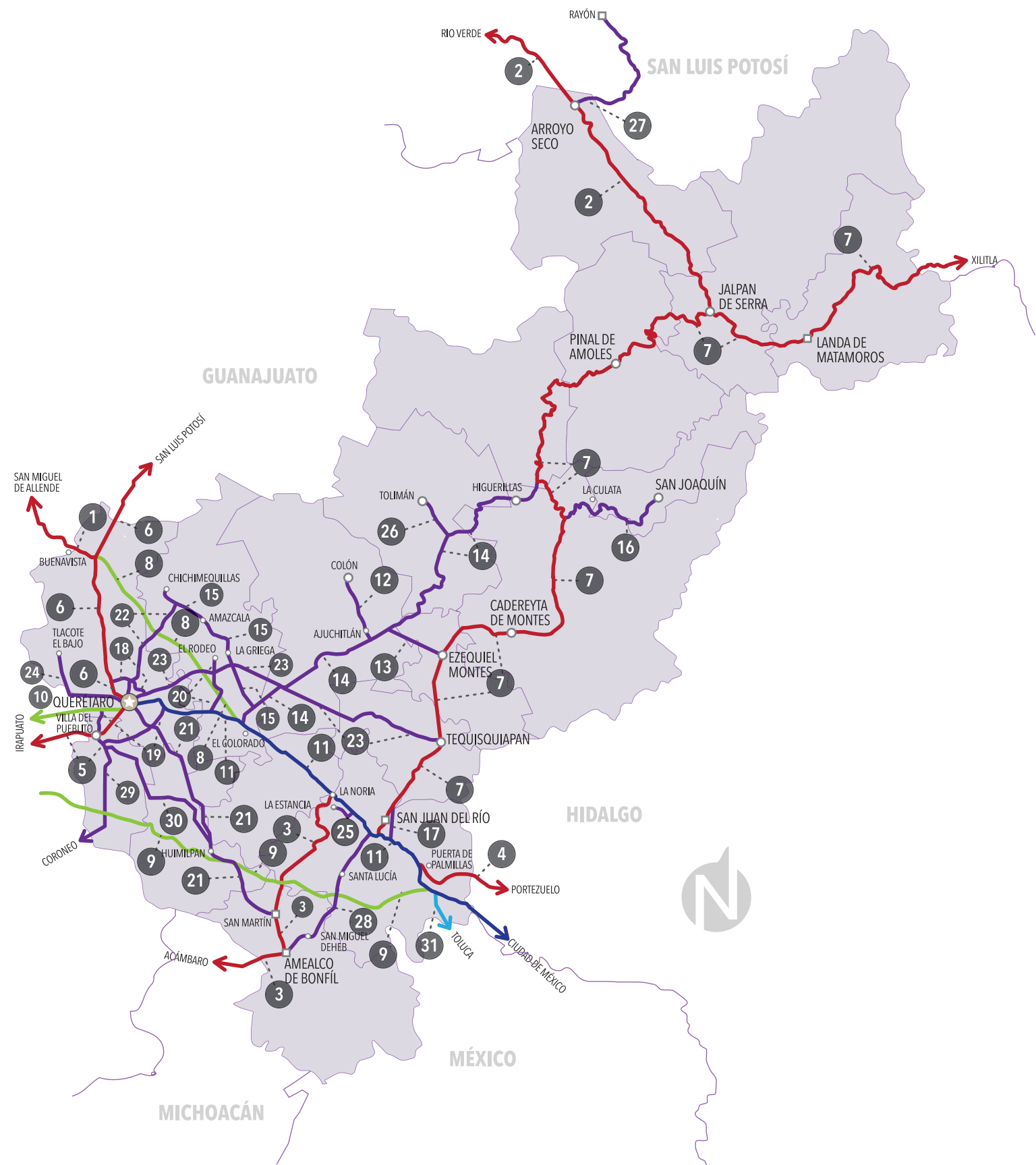
Vehicles going through Querétaro's road network come from three strategic regions in the Mexican Republic: the Metropolitan Area of the Valley of Mexico City; the northern region, integrated by San Luis Potosí and Nuevo León; and the western region.

The locations of the roads can be observed in the following map:





Distribution of roads in the state of Querétaro according to the network they belong to.



Source: Ministry of Communications and Transportation. General Directorate of Technical Services.

Reference number	Road	Route
Toll-free federal network		
1	Buenavista-San Miguel de Allende	MEX-057
2	Jalpan de Serra-Río Verde	MEX-069
3	La Noria-Acámbaro	MEX-120
4	Portezuelo-Palmillas	MEX-045
5	Querétaro-Irapuato	MEX-045
6	Querétaro-San Luis Potosí	MEX-057
7	San Juan del Río-Xilitla	MEX-120
Toll federal network		
8	Libramiento Nororiente de Querétaro	MEX-057D
9	Palmillas - Apaseo el Grande	MEX-045D
10	Querétaro-Irapuato	MEX-045D
Federal network integrated by toll-free and toll stretches		
11	México-Querétaro	MEX-057-MEX-057D
Toll-free state network		
12	Ajuchitlán-Colón	QRO-005
13	Ajuchitlán-Ezequiel Montes	QRO-005
14	El Colorado-Higuerillas	QRO-004
15	Hacienda Paraíso-Chichimequillas	QRO-001
16	La Culata-San Joaquín	QRO-021
17	Libramiento de San Juan del Río	QRO
18	Libramiento Norte de Querétaro	QRO
19	Libramiento Surponiente de Querétaro	QRO
20	Peña Colorada-El Rodeo	QRO
21	Querétaro-San Martín	QRO
22	Querétaro-Estación Chichimequillas	QRO
23	Querétaro-Tequisquiapan	QRO
24	Querétaro-Tlacote El Bajo	QRO
25	Ramal a La Estancia	QRO
26	Ramal a Tolimán	QRO
27	Rayón-Arroyo Seco	SLP-011
28	San Juan del Río-Amealco	QRO
29	Villa del Pueblito-Huimilpan-Coroneo	QRO-GTO
30	Villa del Pueblito-Huimilpan	QRO
Roads integrated by federal and state stretches		
31	Toluca-Palmillas	EM(D)-MEX-055

Source: SCT Center Querétaro, 2020.



## 2.5. Transportation and mobility

### 2.5.1. Railway infrastructure

The main trunk roads of the railway system go through Querétaro: México-Ciudad Juárez, México-Nuevo Laredo, México-Guadalajara-Manzanillo-Mexicali and México-San Luis Potosí. All converge in the area of the International Airport of Querétaro, giving the regional transport system a high potential for intermodal transportation. Also, there is a multimodal dispatch center within the state capital that connects with the Port of Altamira, Tamaulipas.

In the State of Querétaro, the railway network has a length of 520 km of tracks that go through the municipalities of Colón, El Marqués, Pedro Escobedo, Querétaro, San Juan del Río and Tequisquiapan.





# 2.5.2. Vehicle Emissions and Safety Verification Program

According to the vehicle registry of the Vehicle Emissions and Safety Verification Program of the Ministry of Sustainable Development of the Executive Power of the State, the verifiable number of vehicles amounted to a total of 550,000 units in 2020. To estimate the total amount of vehicles in circulation, the number of vehicles located within the entity but registered in other states of the Mexican Republic must be added to this figure.

The use of hybrid and electric vehicles has increased, reducing the emission of pollutants into the air. In the year 2020 6,147 exempt hologram certificates were issued.

From the verifiable vehicle registries, the following emissions and safety verifications were made according to the type of certificate modality. The vehicles that did not comply with the provided in the corresponding regulations are designated as "rejections".

State Vehicle Verification Program, 2020.		
Certificate Type	First Semester	Second Semester
Double zero	4,624	9,755
Zero	31,701	46,865
Two	72,680	80,058
One	1,959	2,945
Rejection	9,065	9,216
Total	120,029	148,839

Source: Ministry of Sustainable Development of the Executive Power of the State. Environmental verification, 2021.







### 2.5.3. International Airport of Querétaro

Inaugurated in the month of November 2004, the International Airport of Querétaro (AIQ for its Spanish abbreviation) shares its location between the municipalities of El Marqués and Colón, 22 km from the capital of Querétaro.

It consists of a total area of 688.49 ha and has a terminal building for commercial passenger transportation, two FBOs (private passenger terminals) focused on corporate and executive aviation, a cargo terminal, various MROs (aircraft repair and maintenance operators), as well as hangars and warehouses for users related to aeronautical operation.

The runway has the following features:

- Hydraulic concrete with a thickness of 43 cm.
- Length of 3,500 m x width of 45 m.
- Magnetic orientation of 09-27.
- Visual aids and localization systems VOR/DME.
- Horizontal and vertical signage for day and night-time operations.

It is complemented with a parallel taxiway, four high speed taxiways and two central taxiways at 45°.

Additionally, it has:

- A 16-position commercial platform in an area of 125,000 m<sup>2</sup>.
- A 4-position loading platform in an area of 35,000 m<sup>2</sup>.
- A 23-position general aviation platform in an area of 33,400 m<sup>2</sup>.

Commercial services such as restaurants, bars, coffee shops, convenience stores, parking, currency exchange, handicrafts stores, ATMs, VIP lounge, and Duty-free shops are offered inside the terminal building. There are also taxi services, car rentals and direct buses to the bus terminals of Querétaro and Celaya.

The terminal has a capacity for 1.7 million passengers per year, with renewed facilities and a larger capacity for: check-in lounge, departure lounge, domestic and international arrivals lounge, public parking lot, as well as the incorporation of telescopic hallways and aero cars for a more efficient and safe passenger boarding.



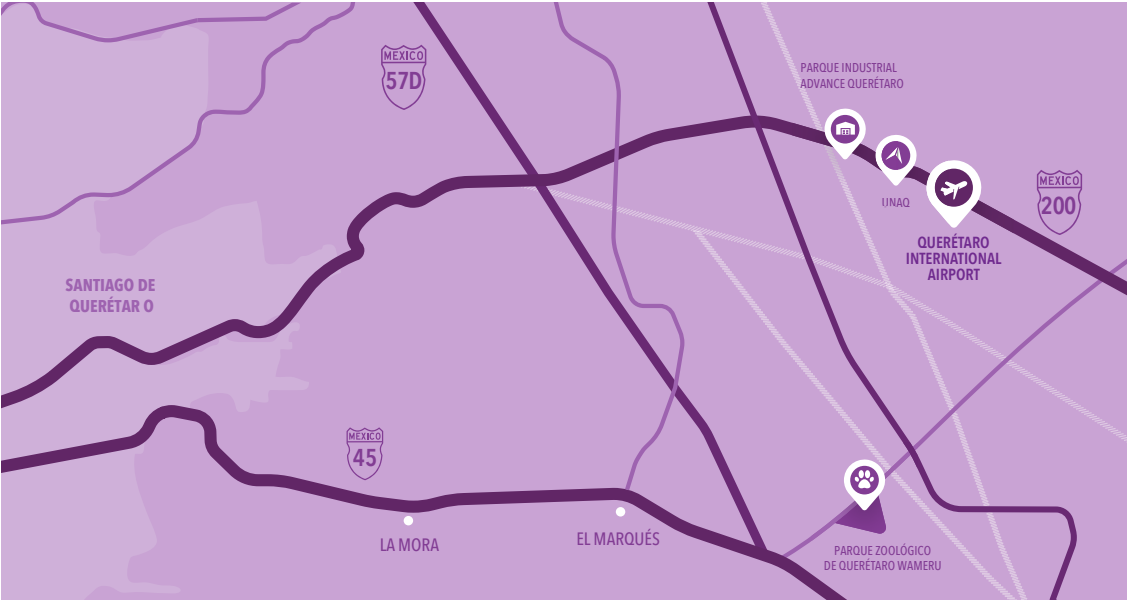
# Operations

During this year, seven commercial passenger airlines rendered their services.

By the end of 2020, regular commercial aviation airlines offered 18 commercial routes to 14 direct destinations, including main hubs, business and pleasure destinations in Mexico and the United States, as seen in the following map:



Location of the Querétaro International Airport.

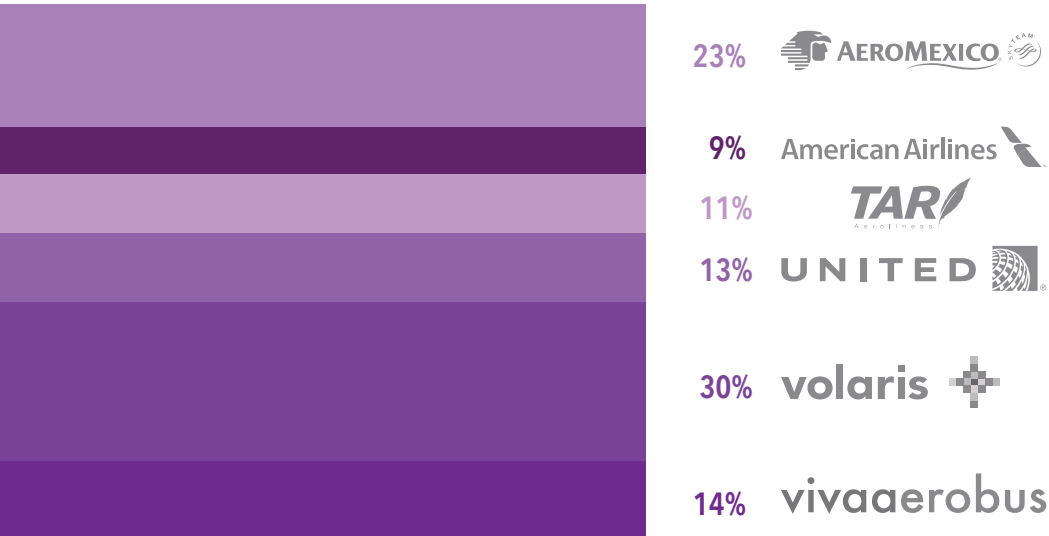


Delta/Aeroméxico’s MRO TechOps are located within the facilities of the AIQ, it is the second largest hangar for aircraft repair and maintenance in Latin America.

Due to the COVID-19 pandemic, operational adjustments in air transport were generated, which had a negative impact on the aviation sector worldwide. 509,098 passengers were transported in 2020 (57.3% less than in 2019), out of which 75% took domestic flights and 25% international flights. As a result, the AIQ moved from position 19 to position 22 among the 59 airports in Mexico in the year 2020 regarding the volume of passengers transported.

The following is the distribution of passengers among the different airlines operating in the AIQ:

Percentage Distribution of passengers per commercial airlines, 2020.



Source: International Airport of Querétaro, 2021.



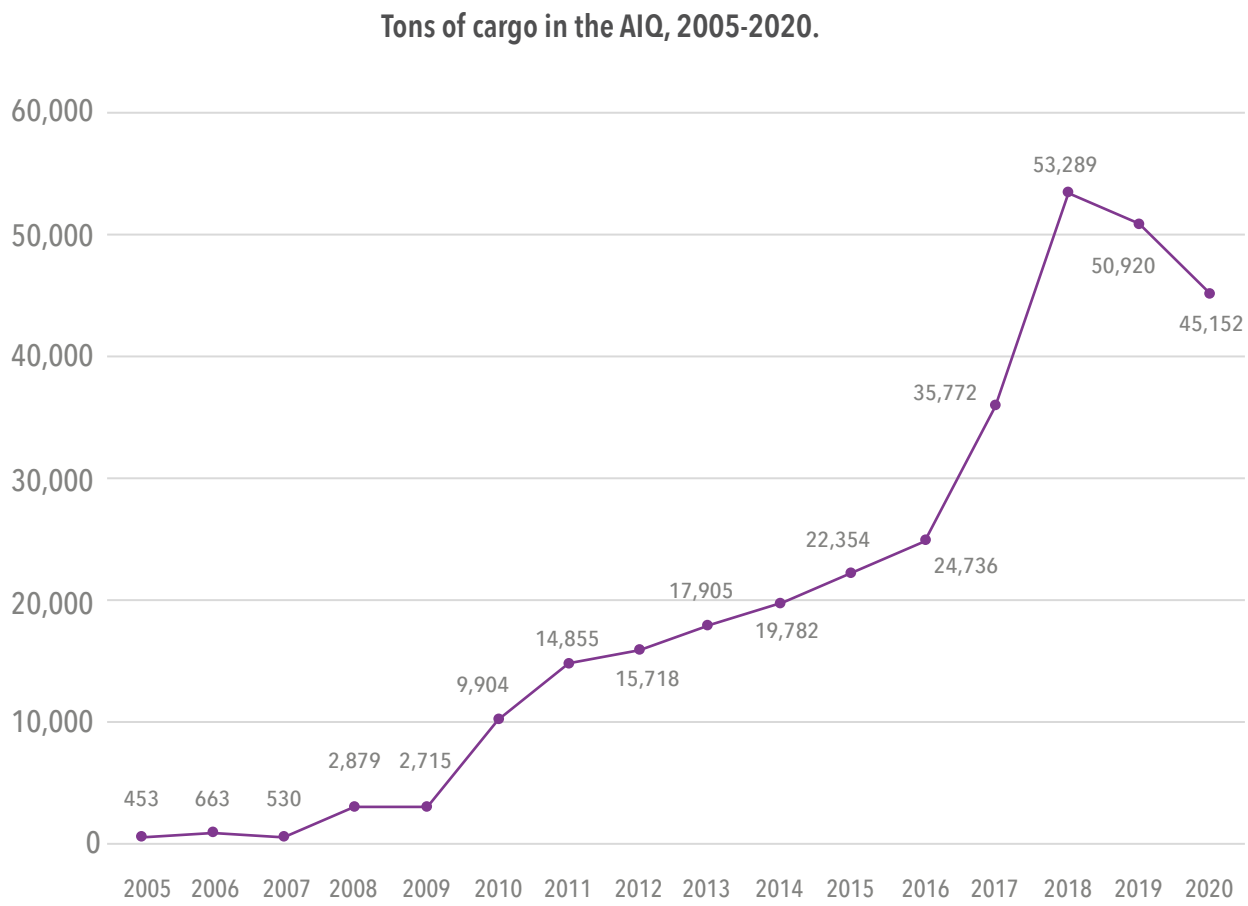
There were 38,351 operations registered in the AIQ during the year 2020, which represented a variation of -30.7% compared to the year 2019. In terms of operations, this result places the airport in 7th place on a national scale.

The cargo terminal works as a logistic hub that provides national and international cargo transportation services. It has specialized areas in the field, in addition to providing the service of bonded warehouse and being interconnected with customs services.

The AIQ transported 45,152 tons of which 33.4% corresponded to international cargo and 66.6% to domestic cargo. With this result, it is the 4th airport in the country in terms of tons transported.

The companies that provided their cargo services were: DHL, FEDEX, MCS, UPS, TSM and Mercado Libre. Both DHL and FEDEX operate their own domestic and international exchange centers with direct flights connecting to their hubs in the United States, which facilitate the import and export of their shipments. For its part, Mercado Libre established their hub in Mexico at the AIQ, where they operate their own domestic exchange center.

The following table shows the tons of cargo transported in the AIQ in the period between 2005-2020.



Source: International Airport of Querétaro, 2021.

Distribution per type of operation AIQ, 2020.



Source: International Airport of Querétaro, 2021.





## Actions to face the COVID-19 pandemic

It is important to highlight that the AIQ has never interrupted its operations since it carries out essential activities.

In order to guarantee the safety of users and airport community personnel, several actions were implemented, including:

- The implementation of sanitary control points for passengers and users of the AIQ with the support of the Ministry of Health.
- The “Safe Travels” seal was obtained, which internationally accredits compliance with protocols to provide health and hygiene protection against COVID-19 in the AIQ’s facilities.
- The development and implementation of protocols to prevent the spread and contagion of COVID-19:
  - Continuous cleaning and sanitization of public spaces.
  - Modification and signage of spaces to maintain a healthy distance in public and office areas.
  - Training for work under the new conditions.

To support business partners affected by the significant reduction in operations and users, a Temporary Support Program was implemented.





# 2.5.4. Bus Terminal of Querétaro

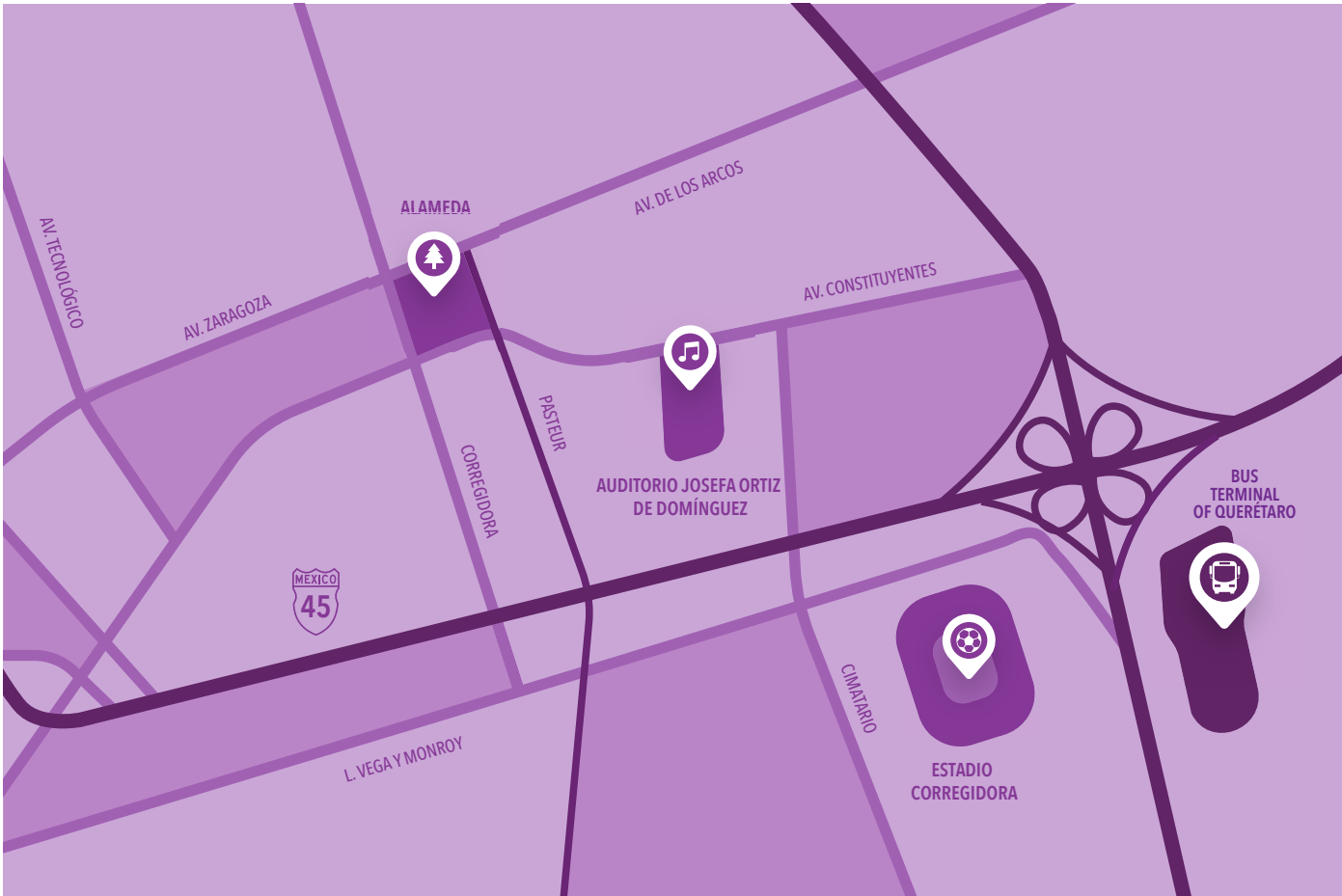
The Bus Terminal of Querétaro (TAQ for its Spanish, abbreviation) is one of the largest and most up-to-date in the Mexican Republic. It has an area of 119,777.98 m², 149 platforms and 191 waiting spots.

In the year 2020, there were 413,000 bus departures registered; 180,000 of these were from First Class and Luxury lines; 125,000 were regular class; and 108,000 were from a feeder route modality. In total, 14 million users were mobilized.

## Location

The terminal is located in the southwest area of the city Querétaro. It has easy access since it is close to the junction where federal highway 57 and Blvd. Bernardo Quintana Arrioja converge.

Location of the Bus Terminal of Querétaro.



## Infrastructure and utilities

The infrastructure of the TAQ consists of two buildings. Building A is used by the first-class and luxury transport lines and has two access points: Access 1 is exclusive for national services and Access 2 is for international transport. In building B, suburban and regional lines operate transfer services within the state, to the municipalities of neighboring entities and to the north of the Mexican Republic.

Like the Airport, the Bus Terminal implemented protocols to prevent the spread and contagion of COVID-19, taking measures such as body-temperature control, sanitization and keeping a safe distance between users of the Terminal.





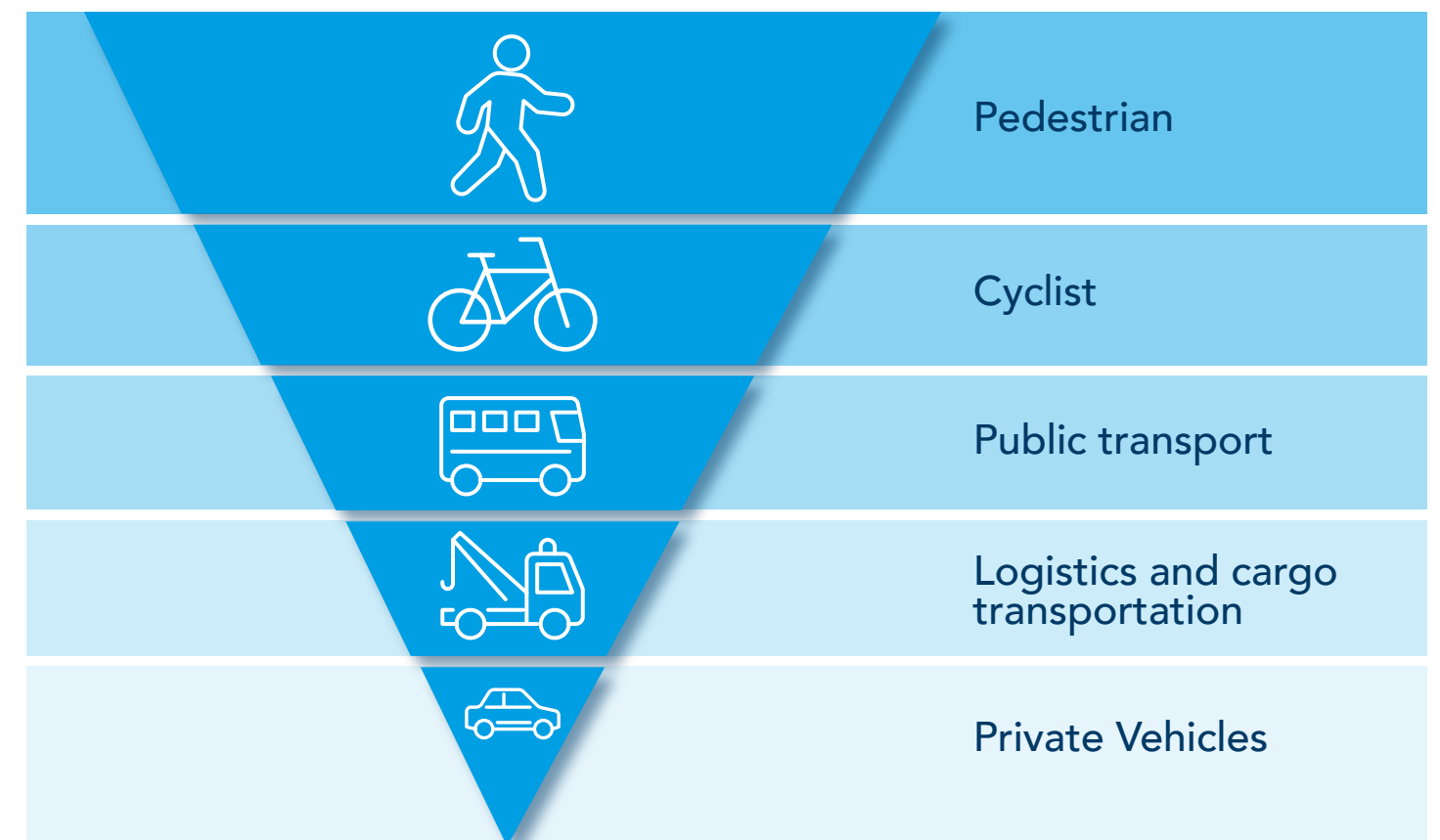


## 2.5.5. Mobility

Mobility is very important for the development of growth centers. It is necessary to analyze the structure and spatial organization of cities in order to understand how activities are distributed within their space, what the most influential factors are in terms of people's mobility, and to make a decision about means of travel. Also, it is just as important to analyze the current conditions based on the hierarchy of attention and priority of the means of transport as defined by the mobility pyramid.

### Urban mobility hierarchy

The descending order of the figure shows the priority that should prevail within urban mobility. The system places the pedestrian at the top of the inverted pyramid due to the social benefit it brings and its positive impact on the environment. In second place is the bicycle, followed by motorized vehicles ranging from public transport to private vehicles located at the bottom of the pyramid.



Source: State Transportation Program Querétaro 2016-2021.







## QUALITY OF LIFE

Quality of life is the result of the harmonic relationship between the different elements that intervene in it and allow us to make a value judgement. When these achieve a real positive, objective and tangible value, it is possible to talk about welfare and dignity. The elements to judge quality of life are related to the economic, social, and cultural context and, in general, to everything that modifies the life of the individual.

Querétaro is a leading state in the national scene. Maintaining this position requires a government dynamic that works to achieve high levels in the quality of life of the population, raising the productive potential and competitiveness of the environment, driving its efforts towards a comprehensive and equal human development.

# PROSPEROUS QUERÉTARO

**595,496**  
INSURED WORKERS  
IN QUERÉTARO

**83,322** LABOR SUPPORT  
MEETINGS

**4,130** SCHOOLS  
BASIC LEVEL, HIGH SCHOOL & UNIVERSITY

SCHOOL CYCLE  
2020-2021

**650,232** ENROLLED  
STUDENTS

**36,365**  
TEACHERS

CHILDREN WITH  
SCHOOL  
BREAKFASTS

**90,559**

**3,312** SPORTS AND  
RECREATION  
FACILITIES

**19.1%** GROWTH IN THE HUMAN  
DEVELOPMENT INDEX

**SAN JOAQUÍN** THE HIGHEST GROWTH AMONG  
THE MUNICIPALITIES IN THE COUNTRY  
(HUMAN DEVELOPMENT INDEX)

PASE PROGRAM SUPPORT FOR  
ECONOMIC REACTIVATION  
**BENEFITTED 1,989**  
DERIVED FROM THE PUBLIC HEALTH  
EMERGENCY DUE TO COVID-19

**4,208** BENEFICIARIES  
REGIONAL DEVELOPMENT PROGRAMS  
MINISTRY OF SUSTAINABLE DEVELOPMENT OF THE STATE OF QUERÉTARO

**158,449** BENEFICIARIES OF  
SOCIAL DEVELOPMENT PROGRAMS

**7.5%** LESS  
POPULATION  
IN POVERTY



# 3.1. Economic Development

## 3.1.1. Employment

For several years Querétaro has stood out for generating economic certainty and a climate of trust that encourages businesspeople to continue investing in the state. The result of this can be appreciated in the wide offer and constant creation of jobs.

### Variation in employment

According to figures from the Mexican Institute of Social Security (IMSS, for its Spanish abbreviation), as of March 2021 almost all of the employments that were lost due to the COVID-19 pandemic had been recovered. The number of insured workers as of March 2021 is 611,101, a difference of only 677 employments compared to the figure from March 2020, when 611,778 employments were registered.

### Formal jobs registered

In the year 2020 the IMSS registered a total of 595,496 formal workers in the entity. 93.4% of them are concentrated in the municipalities of Querétaro, San Juan del Río, El Marqués and Corregidora. The distribution by municipality is shown below:



Insured workers per municipality 2020.	
Municipality	Quantity
Amealco	2,870
Arroyo Seco	46
Cadereyta de Montes	2,103
Colón	13,749
Corregidora	35,335
El Marqués	73,349
Ezequiel Montes	4,908
Huimilpan	2,053
Jalpan de Serra	694
Landa de Matamoros	43
Pedro Escobedo	7,138
Peñamiller	8
Pinal de Amoles	202
Querétaro	388,974
San Joaquín	193
San Juan del Río	58,748
Tequisquiapan	4,858
Tolimán	225
Total	595,496

Source: Mexican Institute of Social Security (IMSS). Open data. Insured 2021.





Income Level

Pursuant to the National Survey of Occupation and Employment (ENOE for its Spanish abbreviation), as of the fourth quarter of 2020, out of the 883,081 people employed in Querétaro, 27.1% received between one and two minimum wages; 17.3% more than two and up to three wages; 8.3% more than three and up to five wages; 2.9% more than five wages, and 11.4% received up to one minimum wage. There is a 3.6% that does not receive an income and 29.4% for whom the amount of their income is not specified.

Income level of employed population in Querétaro, 4 <sup>th</sup> Quarter 2019.			
Level	Total	Men	Women
Up to one mininum wage	100,893	36,599	64,294
More than 1 and up to 2 minimum wages	239,686	137,612	102,074
More than 2 and up to 3 minimum wages	152,393	107,786	44,607
More than 3 and up to 5 minimum wages	73,423	48,802	24,621
More than 5 minimum wages	25,328	19,143	6,185
Don't receive income <sup>1</sup>	31,655	18,339	13,316
Not specified	259,703	163,336	96,367
Total	883,081	531,617	351,464

Source: National Institute of Statistics and Geography. National Survey of Occupation and Employment  
<sup>1</sup>Includes both unpaid dependent workers and self-employed workers engaged in subsistence farming activities.

The ENOE recorded that 72.1% of the people employed in the entity were registered as subordinate and paid workers. Of these, 616,127 earned wages and 20,699 received their income with non-wage payments. This is presented in the following table:

Position of employed population in the State of Querétaro, 4 <sup>th</sup> quarter 2020.			
Level	Total	Men	Women
Subordinated and paid workers	636,826	379,838	256,988
With wages	616,127	365,876	250,251
With non-waged payments <sup>1</sup>	20,699	13,962	6,737
Employers	40,563	30,127	10,436
Freelance workers	186,743	115,814	70,929
Non-paid workers	18,949	5,838	13,111
Total	883,081	531,617	351,464

Source: National Institute of Statistics and Geography. National Survey of Occupation and Employment  
<sup>1</sup>Employed persons who receive from the economic unit as compensation for their work a commission, percentage, fees, tips or a piece rate payment.

Within the category of subordinate and paid workers, 32.5% receive more than one and up to two minimum wages; 17.9% more than two and up to three wages; 8.9% more than three and up to five wages; 3.0% more than five wages; 8.7% up to one minimum wage; and 29.0% did not specify their income level.

Income level of subordinated and paid workers in the state of Queretaro, 4 <sup>th</sup> quarter 2020.			
Level	Total	Men	Women
Up to one minimum wage	55,437	22,009	33,428
More than 1 and up to 2 minimum wages	206,728	118,868	87,860
More than 2 and up to 3 minimum wages	114,129	78,244	35,885
More than 3a and up to 5 minimum wages	56,907	35,918	20,989
More than 5 minimum wages	19,010	13,819	5,191
Not specified	184,615	110,980	73,635
Total	636,826	379,838	256,988

Source: National Institute of Statistics and Geography. National Survey of Occupation and Employment



## National Employment Service

The National Employment Service (SNE for its Spanish abbreviation) is the national level public institution that facilitates the link between those who offer work and those who require it. It guides and supports job seekers in finding employment and assists companies in finding candidates to fill the positions they offer.

According to the SNE based in Querétaro, during the year 2020, 75,312 job support meetings were held, which resulted in 8,847 job placements.

In the subprograms of the Employment Support Program (PAE, for its Spanish abbreviation) that are described below, 131 job support meetings and 94 job placements were reported.

**Training for Employability.** Directed to job seekers who require training to facilitate their placement in an employment or the development of a productive activity of their own.

On its part, the Opening Spaces (Abriendo Espacios) strategy reported 2,453 job support meetings and 537 job placements.

**Opening Spaces Strategy.** Its purpose is to provide personalized attention to job seekers with different abilities or who are senior citizens and, in this way, favor their insertion into the labor market through employment assistance services and support actions. It also participates by providing advice and support to employers in hiring people with disabilities and senior citizens, as well as in the preparation of job descriptions that can be adapted to be filled by these people.

4,530 job support meetings and 473 job placements were reported in the subprograms of the Temporary Agricultural Workers Mexico-Canada (Trabajadores Agrícolas Temporales México-Canadá) and the Labor Mobility Mechanism (Mecanismo de Movilidad Laboral).

**Temporary Agricultural Workers Mexico-Canada.** With the objective of keeping an orderly, legal and safe flow of workers that seek jobs abroad, and aiming to maintain full respect of their labor rights, this federal program was implemented through an international agreement, improving the economy of many Mexican families.

**Labor Mobility Mechanism.** This subprogram fosters the orderly, legal and safe flow of temporary Mexican workers to be employed abroad. The SNE is the only authorized entity for the recruitment, selection and hiring of employees, guaranteeing that the attention provided to them is personalized and free, without the participation of intermediaries.

896 job support meetings, 855 job placements and 122 productive initiatives were reported in the subprograms of the State Employment Program (PEE for its Spanish abbreviation).

**Training for Self-Employment.** This subprogram supports job seekers who require training to facilitate their placement in an employment or the development of a productive activity of their own.

**Equipment for Self-Employment.** Its purpose is to provide support in kind, such as furniture, machinery, equipment and/or tools, to the selected applicants that have the knowledge, skills and working experience to develop a Productive Initiative (IP for its Spanish abbreviation), which is provided through personalized attention and a permanent Labor Advisor.

Summary of Labor Intermediation Services and Employment Support Subprograms (PAE), 2020.

Labor Intermediation Services		Opening Spaces Strategy		Labor Mobility Subprograms		Employment Support Subprogram		Total	
Job support meetings	Job placement events	Job support meetings	Job placement events	Job support meetings	Job placement events	Job support meetings	Job placement events, temporarily occupied and preserved in an employment	Job support meetings	Job placement events, temporarily occupied and preserved in an employment
75,312	8,847	2,453	537	4,530	473	131	94	82,426	9,951

Source: Ministry of Labor of the Executive Power of the State of Querétaro. National Employment Service, 2021.



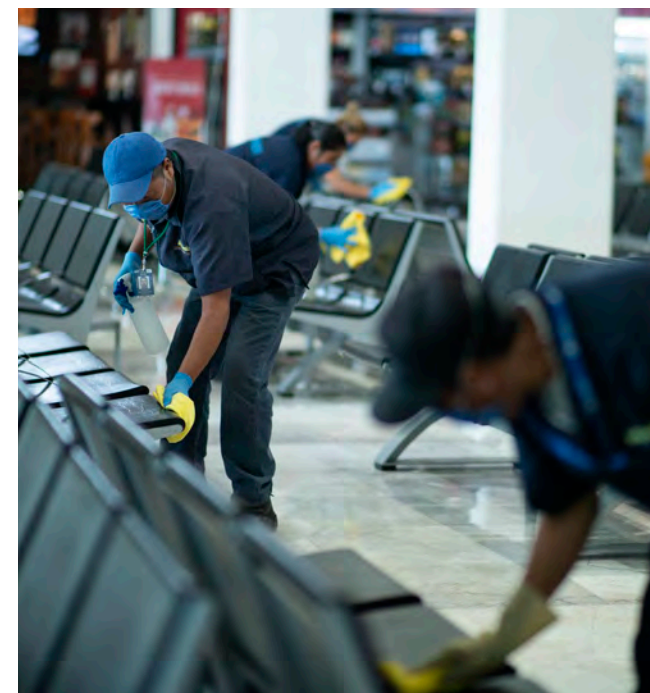
## Summary of the subprograms of the State Employment Program (PEE), 2020.

Subprograms of the State Employment Program			Total	
Job support meetings	Job placement events, temporarily occupied and preserved in an employment	Productive Initiatives Delivered	Job support meetings	Job placement events, temporarily occupied and preserved in an employment
896	855	122	896	855

Source: Ministry of Labor of the Executive Power of the State of Querétaro. National Employment Service, 2021.

## Actions to face the COVID-19 pandemic

- The way of providing employment intermediation services was adapted into virtual frameworks and these actions were considered as a good practice by the Ministry of Labor and Social Welfare, who granted recognition to the State of Querétaro for its innovation in remote intermediation actions with the following services: "Workshops for job seekers", "Virtual recruitments" and "Virtual job placement services", being the first entity to innovate on this front, a model which was later repeated nationwide.
- The World Bank took the State of Querétaro as a reference for its virtual employment strategies, and it was considered in the preparation of the document: "Good practices in the digitalization of public employment services", which foster formal employment for the benefit of society.
- Informative video clips were created to continue providing employment tips to job seekers, placing the State of Querétaro as a pioneer in this activity.
- Inspections related to the compliance with general working conditions were conducted, benefitting 24,757 workers in Querétaro.





Economic reactivation plan

The Ministry of Sustainable Development carried out various actions as part of the economic reactivation plan. This plan has the general objective of generating the conditions needed to recover the rhythm of economic growth and to create jobs by implementing actions that foster competitiveness and that create a link between the different economic sectors.

The particular objectives of the economic reactivation plan were: to recover at least 50% of the jobs lost during the public health crisis, and to recover the growth rhythm of the GDP in the last quarter of 2020 and during 2021.

Also, to provide companies in Querétaro with technological tools to make them more competitive; reactivating the flow of capital by offering credits with a preferential rate; as well as making the link between the offer and the demand by means of business fairs.

State economic reactivation plan, 2020.		
Stage 1: Survival	Stage 2: Resistance	Stage 3: Competitiveness
Focus: Employees.	Focus: Company owners	Focus: Companies
Actions:		
Protection of family income	Promoting exports	Industrial restructuring
Purchase of supplies	Fostering the creation of jobs	Fostering investments
Fostering self-employment	Award for re-hiring	Attracting new companies
Financing	Award for maintaining the labor force	Creation of jobs
Link between offer and demand	Link between offer and demand	Fostering innovation
Development of suppliers	Technological training	Technological development
Equipment and training for self-employment	Fostering a culture of entrepreneurship	
May-July	July-October	August-December

Source: Ministry of Sustainable Development.

3.1.2. Labor peace

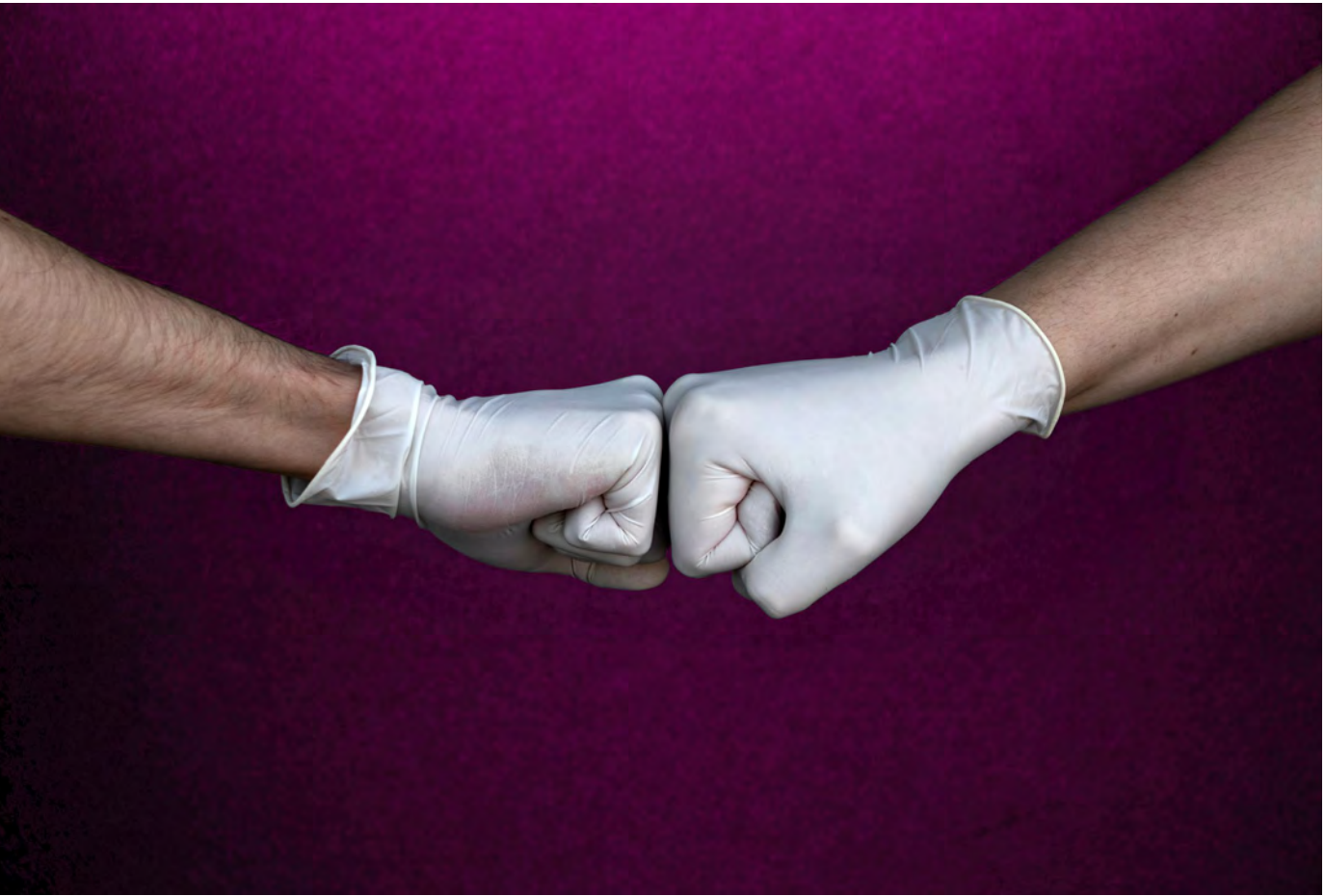
One of Querétaro’s main strengths is its labor peace, which has been maintained for many years. The harmonious relationship between unions and employers is the result of joint efforts and work.

Strike Record

The state government works hand in hand with the leaders of the unions that participate the most in the state to maintain harmony and labor peace in the companies. The common challenge is to overcome the defies that Querétaro faces in the field of competitiveness.

The good relationship between workers and employers has allowed for the last 20 years to flow without complaints or labor conflicts of this nature; this is a clear example of the harmonious atmosphere that the state has.

The data from the INEGI recorded 903 strike notices during the year 2019. All cases without exception were resolved in good terms before any type of work stoppage.





# 3.2. Human Development

## 3.2.1. Education

Formal education, understood as the process that facilitates the learning and formation of individuals, is divided into four stages: initial, basic, high school and university. The educational offer in the country contemplates the totality of its inhabitants. Special education meets the specific training needs of intellectually gifted students and those with different psychological, physical or sensory abilities. The following table shows the distribution of school enrollment in Querétaro divided into those stages:

School cycle enrollment in the state of Querétaro, 2020-2021.			
Level	Students	Teachers	Schools <sup>3</sup>
Initial Education <sup>1</sup>	3,578	138	95
Special Education <sup>2</sup>	2,209	282	24
Basic Education	459,069	19,292	3,649
High School Education <sup>3</sup>	88,436	6,390	258
University Education <sup>3</sup>	96,940	10,263	104
Total	650,232	36,365	4,130

**Source:** F911 System for the statistic integration of national education of the SEP. Ministry of Education of the State Government. Service Unit for Basic Education in the State of Querétaro. Sub coordination of Administrative Proceeding. Central Office of Education Planning. Statistics Department.

<sup>1</sup>School-based modality.

<sup>2</sup>Additionally, special education caters to 6,879 students enrolled in different education levels through the Service Units to Support Regular Education (USAER for its Spanish abbreviation) which is why they are not accounted for in the registration total. The data referred in this chart corresponds to the service of the Multiple Assistance Center (CAM for its Spanish abbreviation).

<sup>3</sup>The school column, in this case, refers to Campuses (High School) and Institutions (University).



The following table exemplifies the contrast between the 2019-2020 and 2020-2021 school years from initial grade level to graduate level:

Comparative chart of students in the State of Querétaro per education level 2019-2020 and 2020-2021 School cycles.				
Level	Students			
	School Cycle		Difference	
	2019-2020	2020-2021	Absolute	%
Initial <sup>1</sup>	5,756	3,578	-2,178	-37.84
Special <sup>2</sup>	2,253	2,209	-44	-1.95
Preeschool <sup>3</sup>	89,914	80,159	-9,755	-10.85
Elementary	259,326	257,565	-1,761	-0.68
Junior High	119,163	121,345	2,182	1.83
Professional intermediate	80	55	-25	-31.25
High School	91,788	88,381	-3,407	-3.71
Superior university technitian	7,025	6,723	-302	-4.30
Bachelor	82,718	84,379	1,661	2.01
Postgraduate	6,075	5,838	-237	-3.90
Total	664,098	650,232	-13,866	-2.09

**Source:** F911 System for the statistic integration of national education of the SEP. Ministry of Education of the State Government. Service Unit for Basic Education in the State of Querétaro. Sub coordination of Administrative Proceeding. Central Office of Education Planning. Statistics Department.

<sup>1</sup>Just school-based system.

<sup>2</sup>Additionally, special education caters to 6,879 students enrolled in the basic education level through the Service Units to Support Regular Education (USAER for its Spanish abbreviation) which is why they are not accounted for in the registration total. The data referred in this chart corresponds to the service of the Multiple Assistance Center (CAM for its Spanish abbreviation).

<sup>3</sup>Includes 1,281 students of 1st grade preeschool catered for in the initial education level.



Initial Education

It is the educational service provided to children under 6 years of age that enhances their development to acquire skills, habits and values to strengthen their independence, creativity and personal and social attitudes. During the 2020-2021 school year, initial education in Querétaro registered 3,578 students, 138 teachers and 95 schools.

Basic education

It includes preschool, elementary and junior high school levels. The following table shows the relationship, by level, of students, teachers and schools.

Basic education enrollment in the state of Querétaro, school year 2020-2021.			
Level	Students	Teachers	Schools
Preschool <sup>1</sup>	80,159	4,059	1,557
Elementary	257,565	9,010	1,528
Junior High	121,345	6,223	564
Total	459,069	19,292	3,649



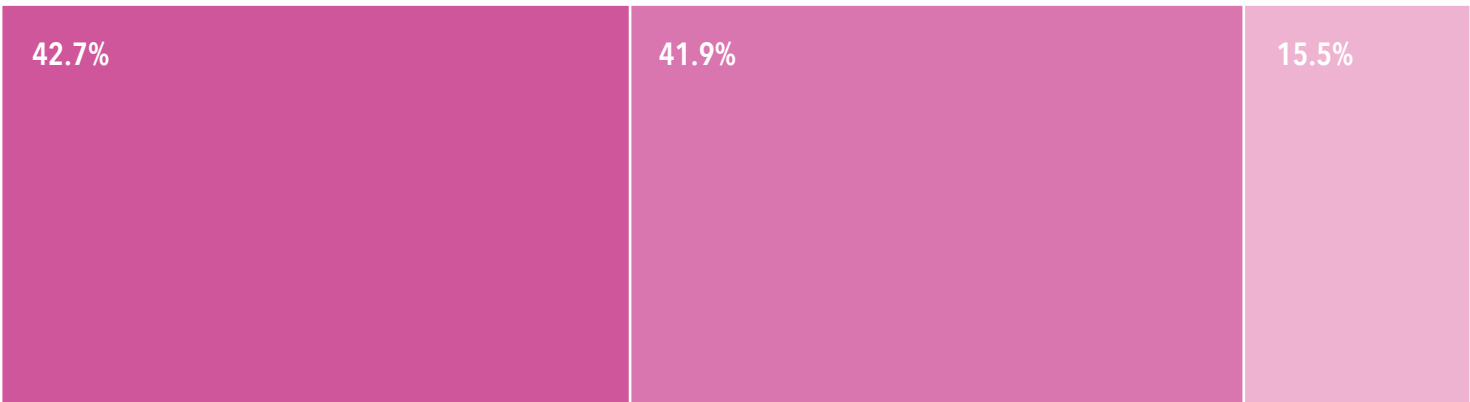
Enrollment



Teachers



Schools

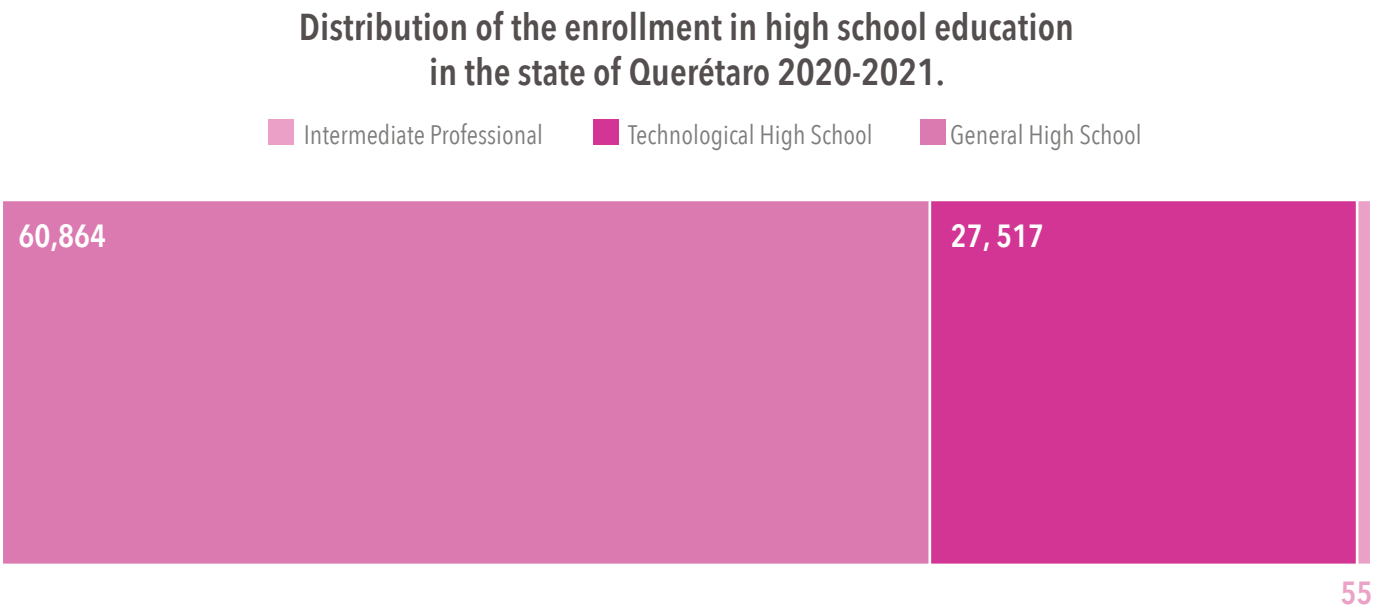


Source: F911 System for the statistic integration of national education of the SEP. Ministry of Education of the State Government. Service Unit for Basic Education in the State of Querétaro. Sub coordination of Administrative Proceeding. Central Office of Education Planning. Statistics Department.  
<sup>1</sup>Includes 1,281 students of 1st grade preschool catered for in the initial education level.



High School Education

During the 2020-2021 school year, the registered enrollment at high school level in Querétaro was of 88,436 students who received instruction from 6,390 teachers in 258 schools. The following table shows the distribution according to the modalities:



Source: F911 System for the statistic integration of national education of the SEP. Ministry of Education of the State Government. Service Unit for Basic Education in the State of Queretaro. Sub coordination of Administrative Proceeding. Central Office of Education Planning. Statistics Department.  
Note: As of the 2019-2020 cycle for the Centers of Technological Studies in Continental Waters the basic component corresponds to the service of Technological High School.  
Intermediate professional is defined as technical professional service(teminal) in the F911 form of the SEP.

School of Professional Technical Education of the State of Querétaro (CONALEP-QRO, for its Spanish acronym).

It is a decentralized public agency of the Government of the State of Querétaro, on September 24, 1999 its "Creation Ruling" was published in the Official Newspaper of the State Government. Its purpose is to educate technical professionals at a high school level according to the vocation of its students and according to the requirements of the productive sector of the state. It has 4 campuses, Querétaro, San Juan del Río, Amealco and Aeronáutico. They offer eleven programs of professional technical high school in:

- Food and beverages.
- Industrial electromechanics.
- Industrial productivity.
- Computer science.
- Machines - Tools.
- Automotive Industry.
- Industrial chemistry.
- Aircraft Lamination and Coating.
- Mechatronics.
- Engine and glider maintenance.
- Electronic Aviation Systems.



It caters for 3,388 students with the support of 372 administrative and teaching staff.

· Conclusion of Conalep Aeronautical Campus Hangar.

The Conalep Aeronautical Campus operates since 2011. It has a hangar that will allow the students of the Aeronautical campus to develop their academic professional internships in a more comprehensive way and even to offer training to operators of companies of the sector, since this type of infrastructure is an important reference in the high school education.

· Internationalization.

The CONALEP and the Japan International Cooperation Agency (JICA) initiated the project Human Resources Training for the Automotive Industry in the Bajío region of Mexico, where they developed a program integrating three pillars of basic technologies: mechanical system, electrical system and management technologies. This was based on the development of the monozukuri spirit. The first generation of this program at the San Juan del Río campus began with 41 students, of which 35 successfully completed the program, representing a completion rate of 85.3%.





#### · Mexican Model of Dual Training (MMFD).

Through the CONALEP-QRO, students benefit from this public-private initiative that seeks to systematically implement a training system for high school technicians. It is inspired by the German training system that harmoniously links theoretical and practical training, alternating learning in the classroom and in the workspace.

#### · School of Scientific and Technological Studies of the State of Querétaro (CECyTEQ for its Spanish abbreviation).

As of the year 2019 it has 12 campuses that have seen 19,339 students graduate. Its educational offer is focused on the following areas:

- Mechatronics.
- Electromechanics.
- Industrial Maintenance.
- Electricity.
- Electronics.
- Administrative Management Processes.
- Logistics.
- Programming.
- Industrial Production.
- Biotechnology.
- Plastic transformation.
- Automotive maintenance.
- Machines - Tools.

And it has 4 different programs:

- |                          |                          |
|--------------------------|--------------------------|
| Engineering Foundations. | Militarized High School. |
| Inclusive High School.   | Dual Training Model.     |

#### · Laboratory of Embedded Systems.

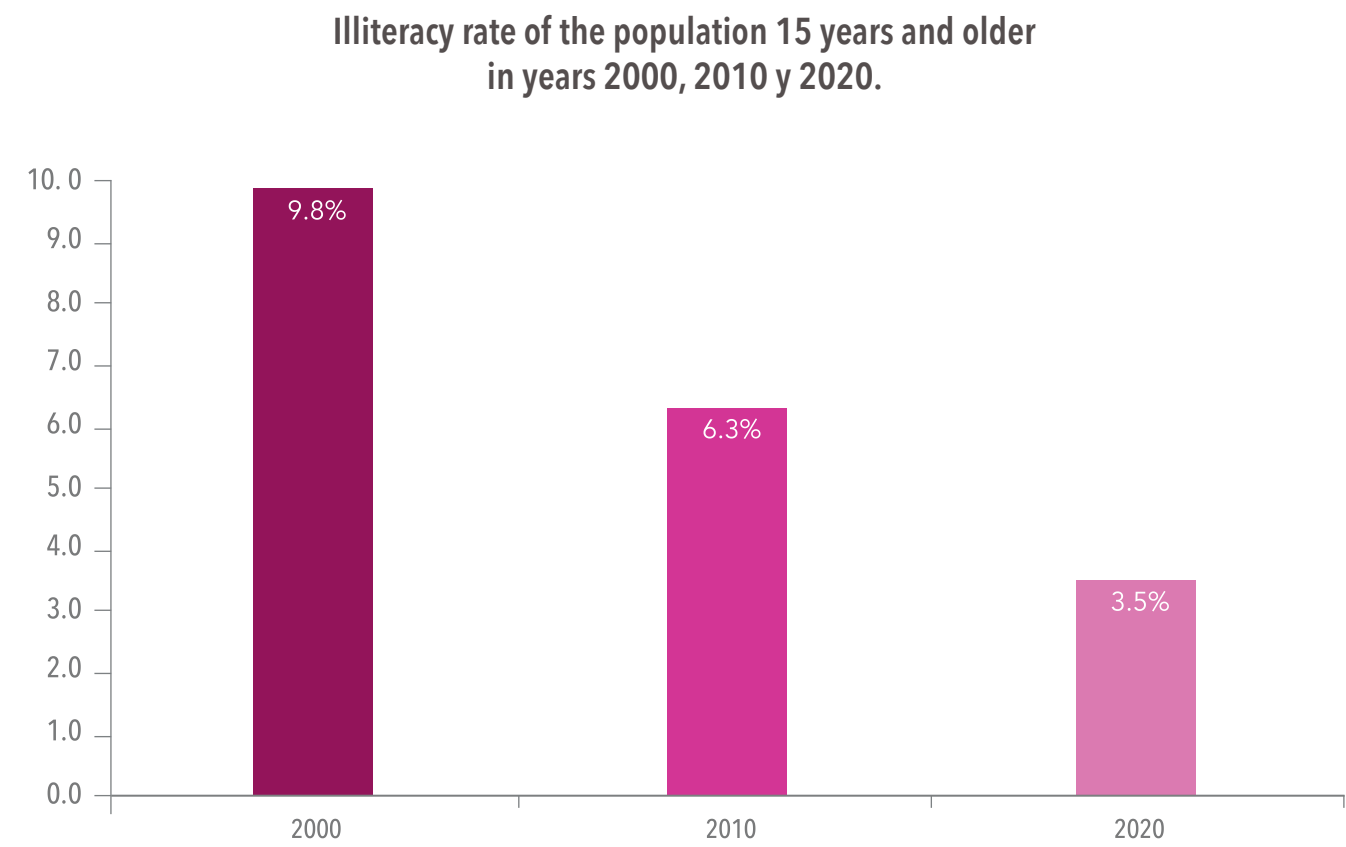
It is found facilities of the CECyTEQ Corregidora campus, where students can work with four interactive educational boards to put technical skills related to Industry 4.0 and Information Technologies (ICT) into practice.

The laboratory has the necessary equipment to carry out internships in digital and analog electronics; application of the Internet of Things; programmable devices of an industrial type (PLC) and its integration with motors, sensors, actuators -among others-; basic manufacture of integrated circuits; and implementation of basic microcontrollers and alternative energy systems to embedded devices.



Illiteracy

This is the indicator that refers to the population over 15 years of age that cannot read or write. Thanks to the increased coverage of basic education and the actions established by the state government, the illiteracy rate in the entity resulted in 3.5% according to the 2020 Census of Population and Housing, 2.8 percentage points below the figure reported in the 2010 Census of Population and Housing.



Source: National Institute of Statistics and Geography. 2020 Census of Population and Housing.



The municipalities with the highest rate of illiterate population are Landa de Matamoros and San Joaquín with 13%, Pinal de Amoles and Amealco with 11%.

Illiterate population 15 years or older per municipality, 2020.		
Municipality	Population 15 years or older	Illiterate
Amealco	45,763	5,099
Pinal de Amoles	18,368	2,088
Arroyo Seco	9,453	1,030
Cadereyta de Montes	48,652	4,032
Colón	46,783	3,214
Corregidora	165,321	2,766
Ezequiel Montes	32,112	2,173
Huimilpan	25,462	2,111
Jalpan de Serra	19,443	1,627
Landa de Matamoros	13,468	1,761
El Marqués	171,260	4,927
Pedro Escobedo	55,239	2,499
Peñamiller	13,386	1,169
Querétaro	813,429	15,812
San Joaquín	5,706	727
San Juan del Río	221,334	6,920
Tequisquiapan	53,600	2,370
Tolimán	19,401	1,409
State	1,778,180	61,734

Source: National Institute of Statistics and Geography. 2020 Census of Population and Housing. Consultation System of Territorial Integration.



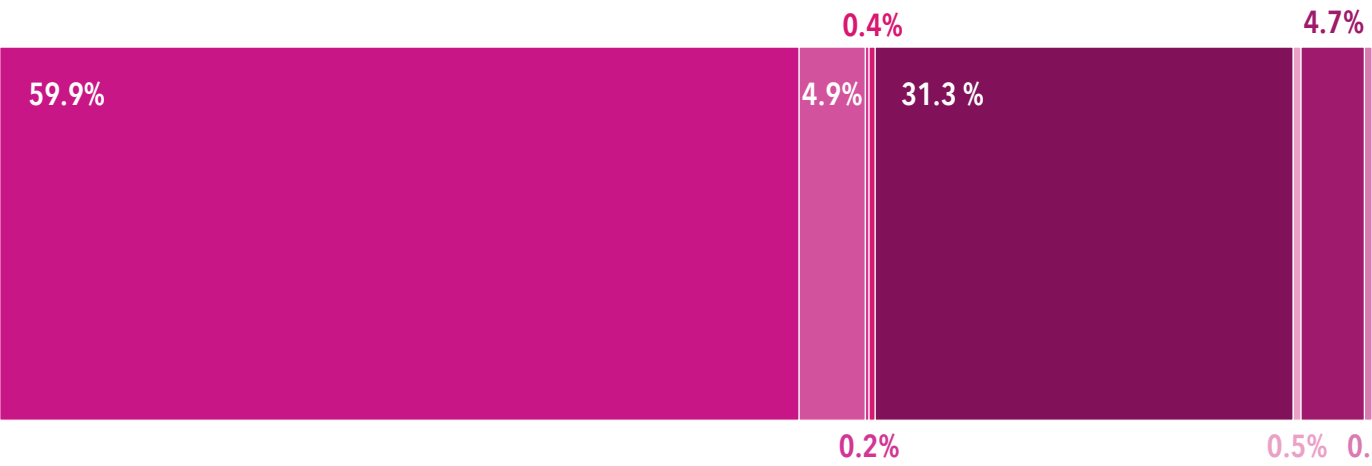
3.2.2. Health

The Mexican Institute of Social Security (IMSS for its Spanish abbreviation), the Institute of Security and Social Services for State Workers (ISSSTE for its Spanish abbreviation) and the Ministry of Health (SSA for its Spanish abbreviation), together with private health institutions, provide health services to the inhabitants of Querétaro.

Access to health services

The 2020 Census of Population and Housing reported that 79.1% of the state population is affiliated to health services. The following is the distribution of the population affiliated to health services in the state.

Population affiliated to health services in the state.	
Total in the Entity of Querétaro	1,873,160.00
Institutions	Total in the Entity
IMSS	59.9%
ISSSTE	4.9%
State ISSSTE	0.2%
PEMEX, Defense or Marine	0.4%
Institute of Health for Wellbeing	31.3%
IMSS BIENESTAR	0.5%
Private institution	4.7%
Other institutions	0.5%



Source: National Institute of Statistics and Geography. 2020 Census of Population and Housing.

Beneficiaries and users

According to information collected by the State Ministry of Health, 54.7% of the population is a beneficiary of the IMSS, while 7.1% is entitled to the ISSSTE.

The municipality of Querétaro contributes the largest number of beneficiaries in the state, both in the IMSS and the ISSSTE, with 58% and 56.5% respectively. San Juan del Río comes in second place with 14.6% of beneficiaries of the IMSS and 12.6% of the ISSSTE.

Beneficiaries and users per social security institute, December 2020.			
IMSS		ISSSTE	
Beneficiaries	Users	Beneficiaries	Users
1,296,277	1,150,020	167,890	160,706

Sources: Mexican Institute of Social Security (IMSS) and Institute of Security and Social Services for State Workers (ISSSTE).





Public and private infrastructure

To meet the health needs of citizens there are a large number of public and private centers and hospitals in the entity. Some of the private medical institutions located in the metropolitan area of Querétaro are the following:

Private medical institutions in the metropolitan area of Querétaro, 2020.	
Economic Unit	
Centro Médico Reforma	Hospital San Pedro
Clínica CER	Hospital Santo Tomás
Clínica en Atención Médica Especializada en Urgencias (AMEU), S. de R.L.	Hospital Star Médica Querétaro
Clínica Médica Jáuregui	Centro de Integración de Especialización Médica NEXUS
Clínica Médica la Piedad	Hospital Ángeles Querétaro
Clínica San Francisco	Hospital San José S.A. de C.V.
Clínica y Hospital el Carmen	Medical Center Juriquilla
Cruz Roja Mexicana S.A. de C.V.	Sanatorio Alcocer Pozo
Hospital de la Santa Cruz S.A de C.V.	Sanatorio Guadalupe
Hospital del Sagrado Corazón de Jesús	Sanatorio San Jorge
Médica TEC 100 S.A. de C.V.	Servicios Médicos San Ángel
Hospital Luis Martin	Torre Médica Santiago de Querétaro
Hospital Médica EBOR	

**Source:** Sedesu with information from DENUE INEGI.  
**Note:** The activity (622111) General hospitals of the private sector is considered in accordance with the System of Industrial Classification of North America (SCIAN for its Spanish abbreviation).

State Health Services (SSA for its Spanish abbreviation) are offered through five hospitals. In the municipality of Querétaro there are two of them: the General Hospital of Querétaro and the Hospital of Specialties for Children and Women. The municipalities of Cadereyta de Montes, Jalpan de Serra and San Juan del Río each have a General Hospital.

Infrastructure for health services

The following information reflects some of the resources available to SSA hospitals in the state:

Hospital Infrastructure of State Health Services, 2020.						
Unit	Assigned Beds	Non Assigned Beds	Operating Rooms	Delivery rooms	Rx chamber	Doctors' Offices
Hospital de Especialidades	140	173	2	3	1	34
Hospital General Querétaro	85	128	1	0	1	23
Hospital San Juan del Río	92	76	2	2	1	26
Hospital Cadereyta	64	28	1	1	1	9
Hospital Jalpan	30	36	1	1	1	13
Total	411	441	7	7	5	105

**Source:** State Health Services (SSA), 2021.

Inventory of main material resources of medical units of social security institutions in the State of Querétaro, December 2020.		
Material resources	IMSS	ISSSTE
Assigned beds	623	101
Non assigned beds	391	68
Incubators	15	4
Doctors' Offices	372	81
Ambulances	20	11
Emergency Areas	19	4
Intensive care areas	2	1
Laboratories	10	3
Xray chambers	17	3
Xray equipment (mobile or fixed)	19	10
Operating Rooms	9	3
Delivery Rooms	1	1
Blood banks	26	0
Pharmacies	32	13

**Sources:** Mexican Institute of Social Security (IMSS) and Institute of Social Security and Services of Workers of the State (ISSSTE). 2021.



Human Resources

The most important resource of the health services offered by the state is the human one. The following is described in detail according to its type and jurisdiction:

Human Resources of the State Health Services, 2020.					
SSA Jurisdiction	Doctors	Nurses	Other professional personnel	Technical personnel	Others
I	1,160	1,385	280	246	794
II	443	512	44	89	281
III	264	348	18	45	136
IV	179	228	18	37	86
Total	2,046	2,473	360	417	1,297

Source: State Health Services (SSA), including first and second level.  
Note: the jurisdictions integrate the following municipalities:  
I: Querétaro, Corregidora, El Marqués, Huimilpan.  
II: Amealco de Bonfil, Colón, Pedro Escobedo, San Juan del Río and Tequisquiapan.  
III: Cadereyta de Montes, Ezequiel Montes, Peñamiller, San Joaquín and Tolimán.  
IV: Pinal de Amoles, Arroyo Seco, Jalpan de Serra and Landa de Matamoros.

The IMSS has the collaboration of over 13,000 people, of which 56.3% are doctors and 43.7% are non-medical staff. 58% of the ISSSTE staff is medical and 42% is non-medical. The highest percentage in both institutions is made up of nurses, out of the total paramedical personnel, representing 70.6% in the IMSS and 91.6% in the ISSSTE as shown in the following table:



Inventory of main human resources of social security institutions in the State of Querétaro, December 2020.

Human Resources	IMSS	ISSSTE
Medical personnel	7,726	885
Direct contact with the patient	1,585	234
Doctors	113	61
Medical specialists	1,049	152
Odontologists	43	12
Residents	276	0
Interns	104	9
In other tasks	132	9
Non-medial personnel	6,009	642
Paramedic personnel	3,972	347
Infirmary	2,806	318
Auxiliary	1,005	100
General	1,192	132
Specialized	410	42
Interns	93	5
Ohers	106	39
Other paramedic personnel	1,166	29
Personnel for diagnosis and treatment auxiliary services	250	99
Administrative personnel	1,488	187
Other personnel	299	9
Total	13,735	1,527

Sources: Mexican Institute of Social Security (IMSS) and Institute of Social Security and Services for Government Workers (ISSSTE), 2021.

Human resources had a considerable increase, in the IMSS they had a variation of 69.8% and in the ISSSTE they had an increase of 68.9% compared to the figure reported in 2019.



### 3.2.3. Sports and recreation

Sport is a source of physical and mental health, it creates discipline, generates respect among human beings and develops skills such as leadership and collaboration. Recreation and play are fundamental practices for the comprehensive and full development of people.

#### Sports infrastructure

Querétaro has numerous sports and recreation facilities, some are managed by the state and municipal governments, others by private educational institutions.

In the year 2020 there were 3,312 sports facilities in the state. 30.8% of them are located in the municipality of Querétaro, followed by El Marqués with 10.7%. All of the municipalities in the state have sports and recreational facilities as shown in the following table:



Sports and recreation infrastructure in the State of Querétaro, December 2020.										
Municipality	Swimming Pools	Baseball fields	Football Fields	Basketball courts	Squash Courts	Tennis courts	Multipurpose courts	Volleyball courts	Running and jogging tracks	Total
Amealco de Bonfil	0	0	18	8	0	3	25	6	1	61
Arroyo Seco	0	0	18	21	0	0	51	3	2	95
Cadereyta de Montes	0	0	28	26	0	1	10	1	2	68
Colón	0	0	48	33	0	1	123	1	1	207
Corregidora	2	6	37	33	2	9	82	4	5	180
El Marqués	1	1	86	48	3	0	210	4	3	356
Ezequiel Montes	0	0	47	30	0	0	96	5	1	179
Huimilpan	0	0	24	25	0	0	52	3	1	105
Jalpan de Serra	1	1	17	36	0	1	125	6	3	190
Landa de Matamoros	0	0	16	20	0	1	4	1	1	43
Pedro Escobedo	0	2	45	45	0	2	110	8	2	214
Peñamiller	0	0	12	22	0	1	78	1	1	115
Pinal de Amoles	0	0	4	6	0	0	12	1	1	24
Querétaro	9	14	229	88	8	12	560	25	75	1,020
San Joaquín	0	0	14	27	0	1	78	1	1	122
San Juan del Río	3	2	12	15	0	1	30	10	8	81
Tequisquiapan	1	5	48	33	0	5	90	10	5	197
Tolimán	0	0	27	15	0	0	10	2	1	55
Total	17	31	730	531	13	38	1,746	92	114	3,312

Source: Sports and Recreation Institute of the State of Queretaro, 2021.  
Note: for this year the classification criteria was updated taking into account the facilities that are in use.



*Actions from the Sports and Recreation Institute of the State of Querétaro to face the COVID-19 pandemic*

The practice of sports, and the participation in national and international events for high-performance athletes, such as physical activities in public spaces, was suspended in Querétaro as of March 2020 as part of the recommended actions to mitigate the propagation of COVID-19.

Once the public health conditions allowed it, the reopening of sports facilities has been carried out adhering to the regulations established by the federal and state healthcare authorities, implementing new public health protocols.





### 3.2.4. Ministry of Youth (SEJUVE for its Spanish acronym)

The Ministry of Youth is responsible for planning, formulating, implementing, coordinating and evaluating public policies designed for Querétaro's youth.

Through development support programs, tools are provided so that Querétaro's youth is fully educated and so that they can increase their participation in the political, economic and social life of the state. From 2020 until the first quarter of 2021, it had an impact on more than 94,521 young people throughout the state. With this purpose, the programs promoted by SEJUVE promote social, human, professional and labor development through contests and sports events, creating an environment of healthy competition among young people.

#### SEJUVE Programs

• **2030 Generation Program:**

In order to stimulate the integration of youth into the generation of positive social capital, the 2030 Generation Program was implemented, which aims to create social awareness among young people who are part of different educational institutions in the entity at high school and university levels. More than 500 young people participated in the 18 municipalities with volunteer and training intervention actions. They made 45 sustainable community gardens, implementing the sustainable development objectives of the 2030 agenda

• **Invitation to Youth Legislature.**

307 young people participated in the integration into the Youth Legislature where 115 law initiatives were generated before the State Congress.

• **Querétaro Youth Awards Contest 2020.**

Over 342 young people registered more than 300 projects in the fields of academics, art, entrepreneurship and social commitment to encourage the personal growth of Querétaro's youth.

#### Healthy Lifestyle

SEJUVE, through its strategy Tu Vida Lo Vale (Your Life is Worth It) and the campaign Es de Valientes (It's for the Brave), has the objective of fostering the taking of free, responsible and informed decisions, creating a culture around a healthy lifestyle for Querétaro's youth. 465 actions have been carried out to generate a culture on healthy lifestyle.

From 2020 until the first quarter of 2021 more than 55,795 young people were impacted by prevention and awareness actions, which are divided into the following central themes:

- a) Health and responsible sexuality for the prevention of teenage pregnancy.
- b) Responsible recreation and road culture for the prevention of road accidents caused by excess speed, the consumption of alcohol and the use of distracting elements while driving.
- c) Building relationships of respect and a culture of peace for the prevention of violence in teenagers.
- d) Identification and expression of emotions for the prevention of suicide in teenagers.
- e) Sports and nutrition for the support and promotion of sports practices, as well as the creation of healthy habits and environments.

#### Professional and work development

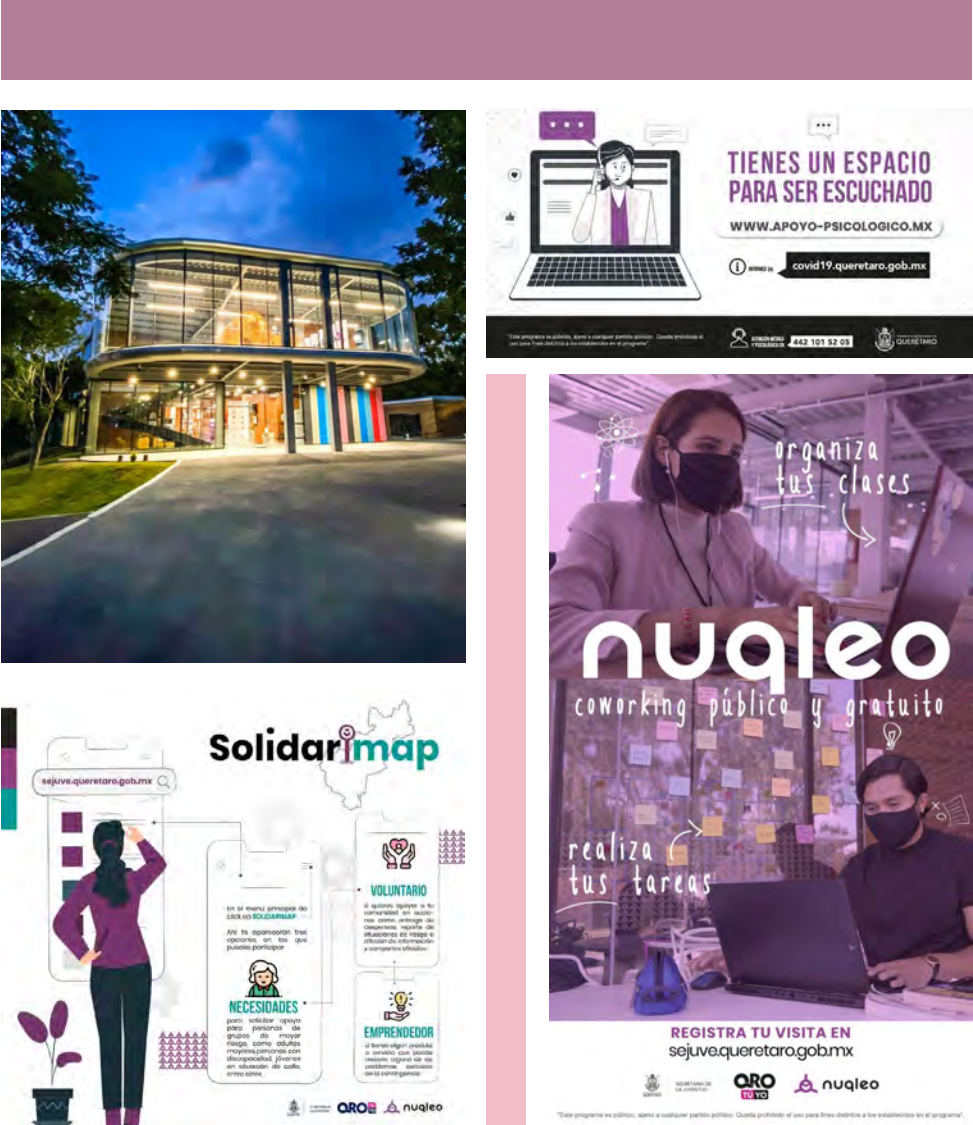
Through virtual events such as job placement services, recruitment events, fairs and the Youth Employment Site, SEJUVE assisted 2,587 young people.

In order to promote entrepreneurship among young people, the "Desafío Emprendedor" (Start-up Challenge) invitation was announced, where 250 young people with innovation and social impact projects participated. "Núcleo Itinerante" and "Núcleo Explora" were also promoted, registering 58 projects.

#### Actions from SEJUVE to face the COVID-19 pandemic.

• **Solidarimap technological tool to connect needs arising from COVID-19.**

With the objective of providing solutions to young volunteers and local entrepreneurs, the Ministry of Youth (SEJUVE) created 'Solidarimap', a technological georeferencing tool to connect needs arising from the COVID-19 crisis.





### 3.2.5. Human Development Index (HDI)

The HDI is a key index that reviews people’s achievements regarding health, education, and income, and provides a multidimensional picture of development.

According to the 2010-2015 Human Development Report, the average HDI of the state’s municipalities for 2015 was 0.781, a high ranking that places it as twelfth in the country. In Querétaro the municipal average health index is the highest (0.899), followed by income (0.796) and education (0.666).

The municipality with the highest growth in the HDI on a national level was San Joaquín, with a rate of 19.12% from 2010 to 2015, the second place was obtained by Landa de Matamoros with a 15.32% increase.

The three indicators that make up the HDI grew in the municipalities of Querétaro: education by 1.27% per year, income 0.58% and health 0.53%.

The following table shows the state’s municipalities and their corresponding income, health, and education indicators:



Municipal Human Development Index, 2015.

	Very high	High	Medium	Low	
Municipality	Income Index	Health Index	Education Index	HDI	
Amealco de Bonfil	0.697	0.761	0.497	0.641	
Pinal de Amoles	0.667	0.753	0.501	0.631	
Arroyo Seco	0.716	0.814	0.537	0.679	
Cadereyta de Montes	0.720	0.772	0.542	0.671	
Colón	0.739	0.808	0.528	0.681	
Corregidora	0.874	0.953	0.781	0.866	
Ezequiel Montes	0.741	0.856	0.569	0.712	
Huimilpan	0.748	0.817	0.499	0.673	
Jalpan de Serra	0.727	0.826	0.587	0.706	
Landa de Matamoros	0.693	0.784	0.512	0.653	
El Marqués	0.785	0.856	0.610	0.743	
Pedro Escobedo	0.771	0.855	0.591	0.730	
Peñamiller	0.687	0.791	0.510	0.652	
Querétaro	0.828	0.946	0.727	0.829	
San Joaquín	0.754	0.814	0.564	0.702	
San Juan del Río	0.778	0.910	0.665	0.778	
Tequisquiapan	0.761	0.882	0.609	0.742	
Tolimán	0.713	0.774	0.564	0.678	

Source: United Nations Program for Mexico’s Development. Human Development Index 2010 and 2015.



# 3.3. Social Development

## 3.3.1. Security

The Government of the State of Querétaro, aware that a harmonious coexistence is a vital component of the entity's progress, works every day to guarantee access to justice, full exercise of rights and the security of people and their assets. The work and effort put into this allows the creation of optimal conditions that impact positively in the comprehensive human development of the population.

### *Citizen Security and its actions in the face of the COVID-19 pandemic*

In Querétaro, the agency in charge of security is the Ministry of Citizen Security (SSC for its abbreviation in Spanish). During the year 2020 the SSC worked on the following programs and actions to face the pandemic:

- **Perimeter security for public health personnel and facilities**

A coordinated action between the state and municipal security institutions for the control and safeguarding of the perimeters of six medical units: the general hospitals of Cadereyta de Montes, Jalpan de Serra, San Juan del Río and Querétaro, the Hospital for Children and Women and the Unit of Medicine and confinement UMA-COVID-19, the SESEQ Supply Warehouse and the State Laboratory of Public Health of SESEQ.

- **Reports of concentration of individuals to the 911 emergency number**

Citizen participation was encouraged for the reporting of any kind of concentration of individuals to the 911 emergency number. There were 34,785 reports of incidents related to public health issues during 2020, which were attended in their entirety through loudspeaker communication, the issuance of recommendations from operative staff and inspection rounds to verify compliance with public health measures.

- **Supervision of non-essential travel, public health control points in roads and inside the state.**

In the 9 permanent public health control points set-up in the access points into the entity, and the over 1,676 mobile control points set-up inside the entity, over 725,377 vehicles were inspected, over 1,415,645 body temperatures were inspected and over 97,207 individuals were sent to their domicile for not being able to justify that their travel was essential, all of them results that contributed towards the protection of the health of Querétaro's population.

- **Vigilant Citizen Social Aid Program.**

The "Vigilant Citizen" ("Vigilante Ciudadano") Program, operated in all 18 municipalities that make up the state of Querétaro, sought to support 1,300 individuals and their families who, due to the public health contingency derived from COVID-19, found themselves in a situation of food vulnerability, by providing a weekly monetary social support fee of \$1,500; additionally, by turning into auxiliaries of the civil protection and public security institutions, the beneficiaries contributed towards the safeguarding of the health and lives of Querétaro's population.

- **Special Anti-COVID-19 Units**

To avoid exceeding the allowed capacity in different establishments and safekeep the security and health of the population, verifications and inspections were executed through coordinated operation between several different authorities, resulting in 108 scatterings of parties or events, 502 suspended establishments and the issuance of over 11,962 recommendations.

- **Measures implemented to face COVID-19 in the security corporations of the state.**

As of March 2020, intensive space sanitization and permanent cleaning works were initiated in the security corporations, as well as

the installation of sanitary control points at the facilities' accesses, for a better care of the personnel. At the same time, general operative orders were issued which were necessary for the attention and verification of sanitary measures, and which were also adopted by the municipalities.

Simultaneously, a constant effort was sustained to broadcast the sanitary measures both to personnel and to the general public. And, as of June, the Daily Monitoring of Contagion Cases in Security Corporations was initiated, as well as the supervisions of physical spaces to verify their occupancy rates, and the management before the SESEQ for the application of SARS-CoV-2 detection tests to personnel and their families, for transfers to the UMA and for the support of family members in case of death of the personnel.





National Survey of Victimization and Perception of Public Security (ENVIPE for its Spanish acronym)

The ENVIPE, carried out by the National Institute of Statistics and Geography, provides relevant information for the design and implementation of public policies on this subject matter.

Prevalence of crime in homes

The ENVIPE estimates that 68% of the homes in Querétaro were not victims of some crime. On the other hand, the crime rate, which is the index used to measure crimes committed for every 100 thousand inhabitants, was of 36,034 cases in the state.



Source: National Institute of Statistics and Geography. National Survey of Victimization and Perception of Public Security (ENVIPE), 2020.



Perception regarding public safety

According to the ENVIPE, homes, automobiles and work take on relevance within the population over 18 years of age, since this is where they perceive greater security.

Perception of security in the population 18 years and older of the State of Querétaro, per public or private space, March 2020.					
Public and Private Spaces	Population 18 years and older	Safe		Unsafe	
		Absolute	Relative	Absolute	Relative
Querétaro	532,781.0				
Home	532,781.0	414,502.0	77.8	116,523.0	21.9
The automobile	456,334.0	337,261.0	73.9	117,908.0	25.8
Work	357,466.0	260,956.0	73.0	96,122.0	26.9
School	82,658.0	59,287.0	71.7	22,772.0	27.5
Shopping Center	502,263.0	357,331.0	71.1	143,557.0	28.6
Park or recreational center	450,329.0	272,878.0	60.6	174,220.0	38.7
Market	494,537.0	261,808.0	52.9	229,352.0	46.4
Highway	484,353.0	219,335.0	45.3	259,744.0	53.6
Bank	449,328.0	188,518.0	42.0	260,353.0	57.9
Public transportation	414,537.0	161,693.0	39.0	250,281.0	60.4
The street	527,854.0	184,914.0	35.0	338,034.0	64.0
ATMs in public spaces	445,984.0	121,919.0	27.3	321,418.0	72.1

Source: National Institute of Statistics and Geography. National Survey of Victimization and Perception of Public Security (ENVIPE), 2020.



Civil Protection

Civil Protection is the set of provisions, measures and actions intended for the prevention, assistance and recovery of the population in the event of a disaster.

One of the main challenges of the State Coordination of Civil Protection of Querétaro (CEPCQ for its Spanish abbreviation) is to create action protocols in the face of disasters and environmental events in order to have management capabilities.

The results of the actions taken by the CEPCQ are shown in the following table:



Results of Civil Protection actions in the State of Querétaro, 2020.	
Activity	Participants
Trained people	10,712
No. Of courses given through the Training Center of Civil Protection	241
No. of training hours	3,264.0
No. of trained community brigade members	410
No. of individuals impacted by the brigade member training	1,640
Broadcasting campaigns of Civil Protection culture	24
Impact in social networks: Facebook (number of followers)	4,469
Impact in social networks: Twitter (number of followers)	5,565
No. of individuals registered as external trainers in civil protection matters	100
No. of individuals registered as consultants in civil protection matters	99
No. of individuals registered as members of the Psychosocial Intervention Network for Emergency and Disaster Situations (IPSED Network)	51
No. of registered volunteer groups (affiliated to the Emergency Attention System of the State)	12 groups of firefighters 26 groups of pre-hospital medical attention 3 groups of mutual aid
Risk analyses	523
Determination of the level of occupancy in places of mass concentration (capacity)	173
Registered Points of Risk	626,816
No. of emergencies attended	2,434
No. of Radio control services attended and channeled	58,916
No. of special operations attended	126
No. of inspections performed	60
No. of mass events attended	155

Source: State Coordination of the Civil Protection of the State of Querétaro, 2021.



### 3.3.2. Accessibility

It indicates the degree of capacity that people have to make use of objects, access places and services and move around freely and without restrictions. All human beings should be able to fully participate in all aspects of daily life regardless of their physical or cognitive abilities.

The main people affected by accessibility barriers are people with disabilities, whether physical, mental, intellectual or sensory. These limitations in the physical environment prevent or obstruct their mobility, communication and understanding thus affecting their personal development and social integration.

#### Population with disabilities

According to data from the 2020 Census of Population and Housing, in Querétaro, 355,047 people stated that they had some kind of disability, limitation or some problem or mental condition.

At the national level, adults between 30 and 64 years old are the population group with the highest percentage representation. 42.8% of all the people with disabilities are in this age range; followed by senior citizens over 65 years of age with 29.1%, young people between 15 and 29 years of age represent 12.7% and children under 14 years of age 9.9%.

Of the people who stated that they had some limitation, 52.9% correspond to the adult population group, 24.9% to senior citizens, 13.3% to young people and 8.8% to children.

According to the census, from the population that states it has a disability according to daily activity, 47.1% has a difficulty for walking, going up or down, 44.1% a visual impairment, even if wearing glasses, 21.9% a hearing impairment, even if using a hearing aid, and 18.6% a difficulty for showering, getting dressed or eating.



Percentage distribution of population in the State of Querétaro according to disability or limitation and gender, 2020.

Population			Population without disability or limitation or mental condition			Population with disability			Population with limitation			Population with some problem or mental condition		
Women	Men	Total	Women	Men	Total	Women	Men	Total	Women	Men	Total	Women	Men	Total
1,211,647	1,156,820	2,368,467	1,018,421	986,519	2,004,940	51,169	44,991	96,160	130,983	113,810	244,793	13,689	15,368	29,057

Source: National Institute of Statistics and Geography. 2020 Census of Population and Housing.



## Education for population with disabilities

In the 2020-2021 school year, the highest number of students with disabilities recorded was in high school. With 13,025 cases, it represented 42.2% of the 30,877 people catered for at the different educational levels.

Students with disabilities catered for in different educational levels. Population in vulnerable conditions. School year 2020-2021.					
Municipality	Preeschool	Elementary	Junior High	High School	University
Amealco de Bonfil	17	314	437	354	-
Arroyo Seco	1	90	30	133	-
Cadereyta de Montes	23	229	87	793	1
Colón	30	262	48	168	13
Corregidora	209	902	318	975	1
El Marqués	135	799	270	937	21
Ezequiel Montes	30	237	129	595	-
Huimilpan	31	456	249	264	-
Jalpan de Serra	51	220	52	220	68
Landa de Matamoros	3	161	45	137	-
Pedro Escobedo	28	251	82	73	-
Peñamiller	8	92	47	182	-
Pinal de Amoles	28	114	64	113	-
Querétaro	902	5,469	1,748	5,264	105
San Joaquín	2	57	37	228	-
San Juan del Río	110	1,173	480	1,381	260
Tequisquiapan	46	367	184	864	-
Tolimán	9	140	80	344	-
Total	1,663	11,333	4,387	13,025	469

Source: F911 System for the statistic integration of national education of the SEP. Ministry of Education of the State Government. Service Unit for Basic Education in the State of Querétaro. Sub coordination of Administrative Proceeding. Central Office of Education Planning. Statistics Department.  
Note: preeschool, elementary and junior high include students with a disability and with outstanding capabilities and in high school as of the school year 2020-2021.

## Accessibility conditions in the education sector

According to the INEGI's 2014 Census of Schools, Teachers and Students of Elementary and Special Education, nationwide 24.5% of public-school campuses have ramps that comply with the standards for access and circulation. In Querétaro this figure amounts to 26.5%. In the case of private schools, the national figure is 33% and in the state of Querétaro it is 40.3%.

## Attention to vulnerable people

The DIF Querétaro State System reported that in 2020 it catered to a total of 19,003 people with disabilities to whom it provided 11,867 medical and paramedical consultations at the Center for Integral Rehabilitation of Querétaro (CRIQ for its Spanish abbreviation).

With the purpose of developing the well-being of Querétaro's families and contributing to the reduction of conditions of vulnerability in Querétaro, the DIF implemented the following programs in 2020:

**Specialized and senior citizen transportation.** It has 11 buses and 3 vans that made 59,843 transfers possible for the benefit of 13,294 people.

**Community Development.** 23 health and services campaigns were held, benefiting 3,495 people. The program was present in 23 locations in the 18 municipalities of Querétaro where, in addition, 1,450 women received productive and human development training through various workshops.

**Productive projects.** Support was provided to 100 families with supplies, 368 members from 17 development groups were supported through 44 training actions and the delivery of supplies for community investment strategies.

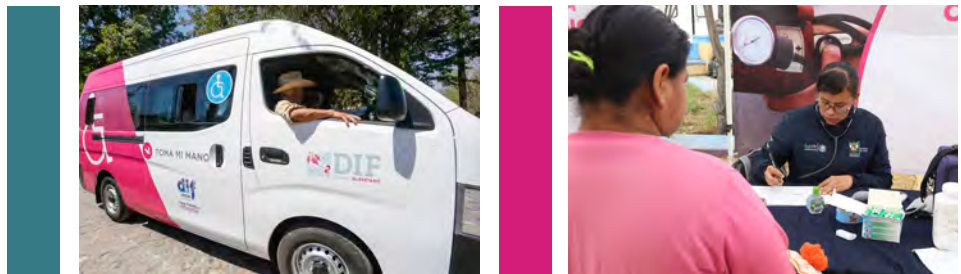
**Defense of children and family.** The well-being of children and teenagers is a priority for the DIF State System. With this program, 8,613 services were provided between adoptions, interventions in family, civil and criminal matters, third parties, restitution of rights, trials for loss of parental custody and 780 interventions through amparo proceedings.

**School breakfasts.** 90,559 children were supported with 18,122,400 breakfasts in 1,762 schools in 918 communities of the 18 municipalities in the state.

**Child Development Center (CADI 2 and 3 for its Spanish abbreviation):** The program benefited 355 children between the ages of 1 and 5 years and 11 months, providing 33,764 meals and breakfasts in addition to educational services.



**DIF**  
ESTATAL QUERÉTARO





Actions of the State System for the Comprehensive Development of the Family of the State of Querétaro to face the COVID-19 pandemic

Throughout the public health contingency derived from COVID-19, in the period between April and December 2020, 1,436 food packages for home preparation were delivered.

With the purpose of providing support for senior citizens in eight nursing homes located in the municipalities of Colón, Corregidora, Jalpan de Serra, Querétaro and San Juan del Río, 386 medical visits specialized in geriatrics were conducted, as well as talks about environmental sanitation and the special care of seniors, this action benefitted 253 senior citizens weekly.

Home activities were implemented; music, ballroom dancing, folklore, physical activation, handicrafts and Taiichi, medical advice and psychology classes were offered through different digital platforms. A total of 321 workshops for senior citizens were recorded.

With the objective of catering to people with some kind of disability, 791 videos for language therapy, 21 brochures for home therapy programs, and 20 video clips for physical and language exercises were created.



3.3.3. Poverty and inequality

The National Council for the Evaluation of Social Development Policy (CONEVAL for its Spanish acronym) is the organization in charge of quantifying the different variables that determine poverty indexes in Mexico and evaluating the federal government’s social policy and programs.

Based on the report “10 years of measuring poverty in Mexico, advances and challenges of social policy” of the CONEVAL, relevant data of the population of the State of Querétaro living in poverty and extreme poverty in the period comprised between 2008 and 2018 are shown:

- Poverty decreased by 7.6 percentage points from 35.2% to 27.6% of the state’s population. Virtually 50,000 people got out of this situation in 10 years as the number dropped from 629.1 thousand to 579.2 thousand inhabitants.
- Extreme poverty decreased by 3.5 percentage points, from 5.5% to 2% of the state’s population. The population in this condition was reduced by 56.4 thousand people, from 97.6 thousand to 41.2 thousand inhabitants.
- The percentage of the population with at least three social deficiencies decreased by 10 percentage points, from 21% to 11.1%, which represents a decrease of 143,350 people.
- It is notable that the indicator for lack of access to health services is the one that had the greatest reduction, from 26.6% to 11.8%, a difference that represents a decrease of 15 percentage points.
- The percentage of the population with an income below the extreme poverty line decreased by 3.3 percentage points, from 11% to 7.7%. The number of people in this condition was reduced from 195,870 to 161,102 inhabitants, that is, 34,770 people less than in 2008.
- The number of people with an income below the poverty line fell by 6.4 percentage points, from 40.3% to 33.9%. The number of people in this condition was reduced from 720,117 to 712,416 inhabitants, which represents 7,700 people less than at the beginning of the period.

In national context:

In the year 2018 Querétaro occupied the 8th place with the lowest proportion of population living in poverty, improving 3 positions compared to the year 2016. The state recovered 6 positions in terms of population living in extreme poverty by occupying 7th place.

The state holds 7th place nationwide with the lowest proportion of population living in extreme poverty (2.0%), Nuevo León is the state with the lowest rate (0.5%), followed by Aguascalientes and Coahuila (1.2% and 1.4% respectively).



Querétaro occupies the fifth position with the lowest proportion of population that lacks access to food.

Of the 18 municipalities in Querétaro, 16 reduced the level of poverty in the period from 2010-2015. Extreme poverty in 2015 decreased in 17 municipalities in absolute terms.

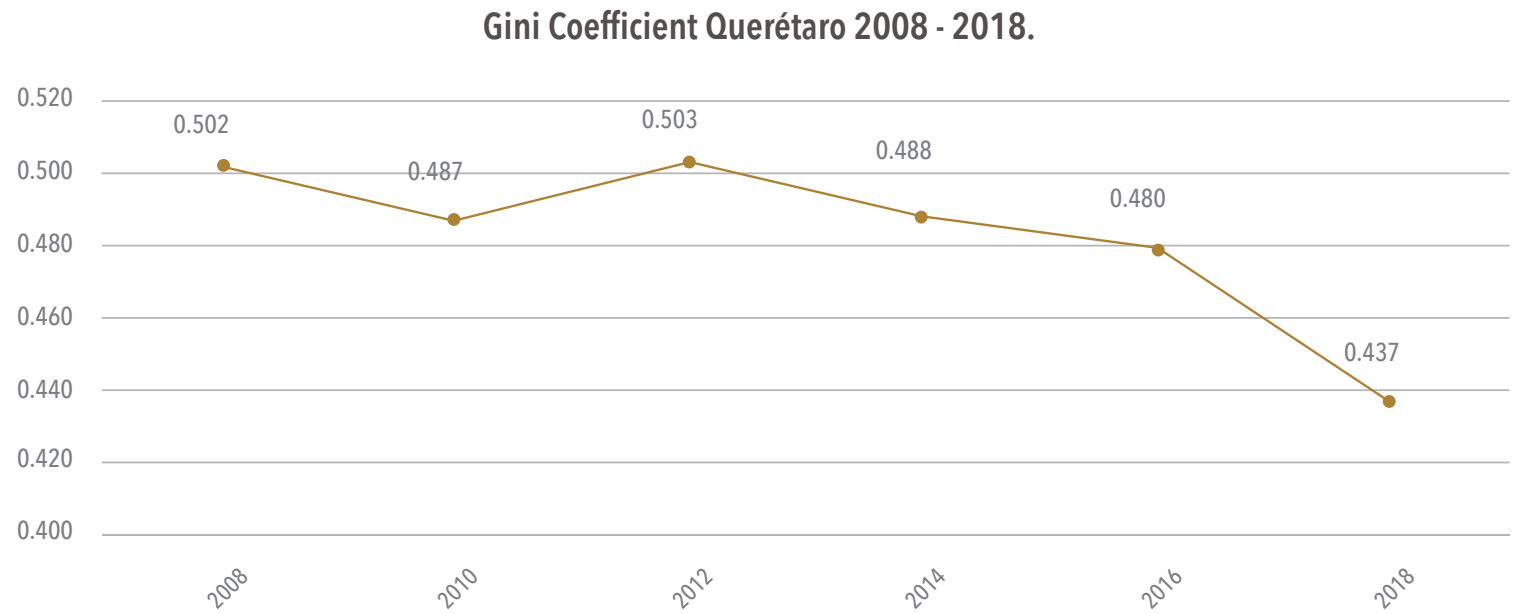
Average number of people and deficiencies by poverty indicator in the state, 2008-2018.		
Indicators	Thousands of people	
	2008	2018
Poverty		
Population in poverty	629.1	579.2
Population in moderate poverty	531.5	538.0
Population in extreme poverty	97.6	41.2
Vulnerable population due to social deficiencies	625.9	798.4
Vulnerable population due to income	91.0	133.2
Non-poor nor vulnerable population	440.6	589.2
Social Deprivation		
Population with at least one social deficiency	1,255.0	1,377.6
Population with at least three social deficiencies	375.7	232.3
Social Deficiency Indicators		
Education gap	364.7	310.3
Lack of access to health services	478.6	248.5
Lack of access to social security	1,030.5	1,106.0
Lack of home quality and spaces	212.3	178.0
Lack of access to basic services at home	254.5	266.1
Lack of access to food	320.4	291.3
Well-being		
Population with income below the extreme poverty line due to income	195.9	161.1
Population with income below the poverty line due to income	720.1	712.4

Source: CONEVAL estimates based on MCS-ENIGH 2008 and MEC of MCS-ENIGH 2018.

Gini Coefficient

The analysis of inequality patterns allows us to consider changes in different segments of the population below a certain poverty line. This makes it possible to evaluate efforts to change the population's standard of living with essential deficiencies from the perspective of how opportunities and associated outcomes are distributed among the population.

The Gini coefficient is an analytical tool that allows us to measure inequality in a certain period. It is a measure between 0 and 1, where 0 indicates perfect equality and 1 perfect inequality. In 2018 the state of Querétaro advanced 6 positions in the reduction of inequality in the national ranking by going from 24th to 18th place, with this, its value went from 0.480 to 0.437. This progress shows the effort that has been made to reduce inequality between the most and least favored.



Source: CONEVAL estimates based on MCS-ENIGH 2008, 2010, 2012, 2014 and MEC of MCS-ENIGH 2016 and 2018.







## Social gap index per municipality, 2015.

### Social Gap.

The social gap index is a dynamic tool implemented by the CONEVAL. It allows ordering the federal entities, municipalities and localities from a greater to a lesser degree of social gap during a period. The indicator is a measure that comprises different variables, such as education, access to health services, basic services in housing and quality of spaces and assets in the home.

The social gap index does not seek to measure poverty, since it does not include information on income, access to social security or access to food.

This factor provides information on social indicators and the inequality of social coverage that subsists at the municipal level. This factor is calculated every 5 years, the last one was obtained in the 2015 Intercensal Survey.

In 2015 Querétaro reported a low social gap index (-0.42) and ranked 20th place nationwide.

Municipality	Social gap index	Social gap degree
Amealco de Bonfil	0.17	Medium
Pinal de Amoles	0.56	High
Arroyo Seco	-0.43	Low
Cadereyta de Montes	0.01	Medium
Colón	-0.40	Low
Corregidora	-1.45	Very low
Ezequiel Montes	-0.54	Low
Huimilpan	-0.45	Low
Jalpan de Serra	-0.28	Medium
Landa de Matamoros	0.07	Medium
El Marqués	-0.92	Low
Pedro Escobedo	-0.84	Low
Peñamiller	0.12	Medium
Querétaro	-1.32	Very low
San Joaquín	-0.34	Low
San Juan del Río	-1.09	Very low
Tequisquiapan	-0.77	Low
Tolimán	0.10	Medium

Source: National Council for the Evaluation of Social Development Policy (CONEVAL).



### 3.3.4. Regional development

Through the Department of Regional Development of the Ministry of Sustainable Development of the State Government, 18 municipalities were catered for together with the Program for the Regional Empowerment of the State of Querétaro.

Among the projects supported this year are: bread making, wood working, blacksmiths and artisans, among others.

Program for Regional Empowerment, 2020.

Municipality	Projects	Women	Men	Direct beneficiaries
Amealco de Bonfil	22	17	33	50
Arroyo Seco	10	7	9	16
Cadereyta de Montes	4	6	2	8
Colón	5	6	4	10
Corregidora	1	2	0	2
El Marqués	7	4	6	10
Ezequiel Montes	1	1	1	2
Huimilpan	1	2	0	2
Jalpan de Serra	6	6	6	12
Landa de Matamoros	0	0	0	0
Pedro Escobedo	3	3	3	6
Peñamiller	0	0	0	0
Pinal de Amoles	8	6	10	16
Querétaro	9	10	6	16
San Joaquín	1	0	1	1
San Juan del Río	14	15	11	26
Tequisquiapan	7	5	9	14
Tolimán	18	23	15	38
Total	117	113	116	229

Source: Ministry of Sustainable Development, Office of Regional Development, 2021.

Due to the need to promote the development of various sectors of the economy, SEDESU implemented the Program to Support Economic Sectors (PASE for its Spanish acronym). The program's purpose is to promote and encourage mining, artisanal, commercial, service, agro-industrial and other activities considered as traditional in the state economy. This allows for a balanced economic growth by sectors and regions of the state of Querétaro.

During the year 2020, 2,019 projects were supported directly benefiting 3,979 people.

The following table shows the beneficiaries by category of the PASE program. Support provided for the economic reactivation due to the public health emergency derived from COVID-19 stands out.

Beneficiaries of the Program to Support Economic Sectors (PASE) per category, 2020.

Category	Projects	Men	Women	Direct beneficiaries
Support to markets and informal businesses	6	789	618	1,407
Mining and brick-makers	2	11	333	344
Support for agro-industrial projects	5	18	4	22
Contingencies and disasters	7	17	19	36
Support for the economic reactivation of businesses established in the commercial and service sectors, affected due to the public health emergency derived from the SARS-CoV2 virus.	1,989	1,189	800	1,989
El Pedregoso Market, San Juan del Río.	2	98	75	173
Support to night clubs, discotheques, bars, canteens and the like	8	1	7	8
Total	2,019	2,123	1,856	3,979

Source: Ministry of Sustainable Development, Office of Regional Development, 2021.



### 3.3.5. Social development programs

The Ministry of Social Development of the State of Querétaro (SEDESOQ for its Spanish acronym) is the agency of the Executive Power of the state that has the purpose of fostering and guaranteeing access to social development, dignity and the full exercise of social rights for the inhabitants of the state. The following chart shows the list of beneficiaries per program:

Beneficiaries of social development programs in the state of Querétaro, 2020.	
Program	Beneficiaries
Housing (breakdown of actions is attached)	1,974
Support for access to housing and improvement of quality of life for personnel entitled to the legal use of force	290
School transportation	10,413
Food	44,103
Territorial Regularization of Human Settlements	1,922
Productive Projects	234
For your family economy, public transportation	99,463
Empowerment of organized social involvement	50
Total	158,449

Source: Ministry of Social Development of the Executive Power of the State of Querétaro, 2021.

Housing	
Type of action	2020 Actions
Solid roof	565
Additional room	659
Additional room for the elderly	416
Solid ground	334
Total	1,974

Source: Undersecretariat of programs and Social Infrastructure of SEDESOQ, 2021.



#### Actions of the Ministry of Social Development to face the COVID-19 pandemic

• **Program For a Strong Querétaro (Por un Querétaro Fuerte)**

It was a temporary economic protection measure for those people who lost their jobs or their source of income as a result of the COVID-19 pandemic, with coverage in all 18 municipalities of the state. This program benefitted a total of 59,782 people by delivering 4,000 (four thousand pesos 00/100 M.N.) in a single payment, and it had the following angles:

1. For a Strong Querétaro for Workers
2. For a Strong Querétaro for Self-Employed Workers
3. For a Strong Querétaro for People who Lost their Source of Income

• **Food Support Program**

The “Emergency Protection Support in face of the COVID-19 pandemic in the State of Querétaro” had the objective of delivering packages of food to the people that faced a reduction or loss of their income due to the effects of the contingency from COVID-19. This program was implemented in the 18 municipalities of the State of Querétaro by delivering 270,000 packages with food and cleaning supplies, house by house.

• **Emergency support for health services personnel of the state of Querétaro that provide services in the diagnostics, transfer and attention units of COVID-19.**

This program supported 1,661 workers of the SESEQ who were active in the provision of contact and attention services for patients with the COVID-19 disease, according to the following classification groups:

**Group 1.** Workers of the SESEQ who were active in the provision of services in the reconverted attention Units received an economic support of \$10,000.00 (ten thousand pesos 00/100 M.N.).

**Group 2.** Workers of the SESEQ who were active un the provision of services in the attention, diagnostics and transfer Units received an economic support of \$5,000.00 (five thousand pesos 00/100 M.N.).





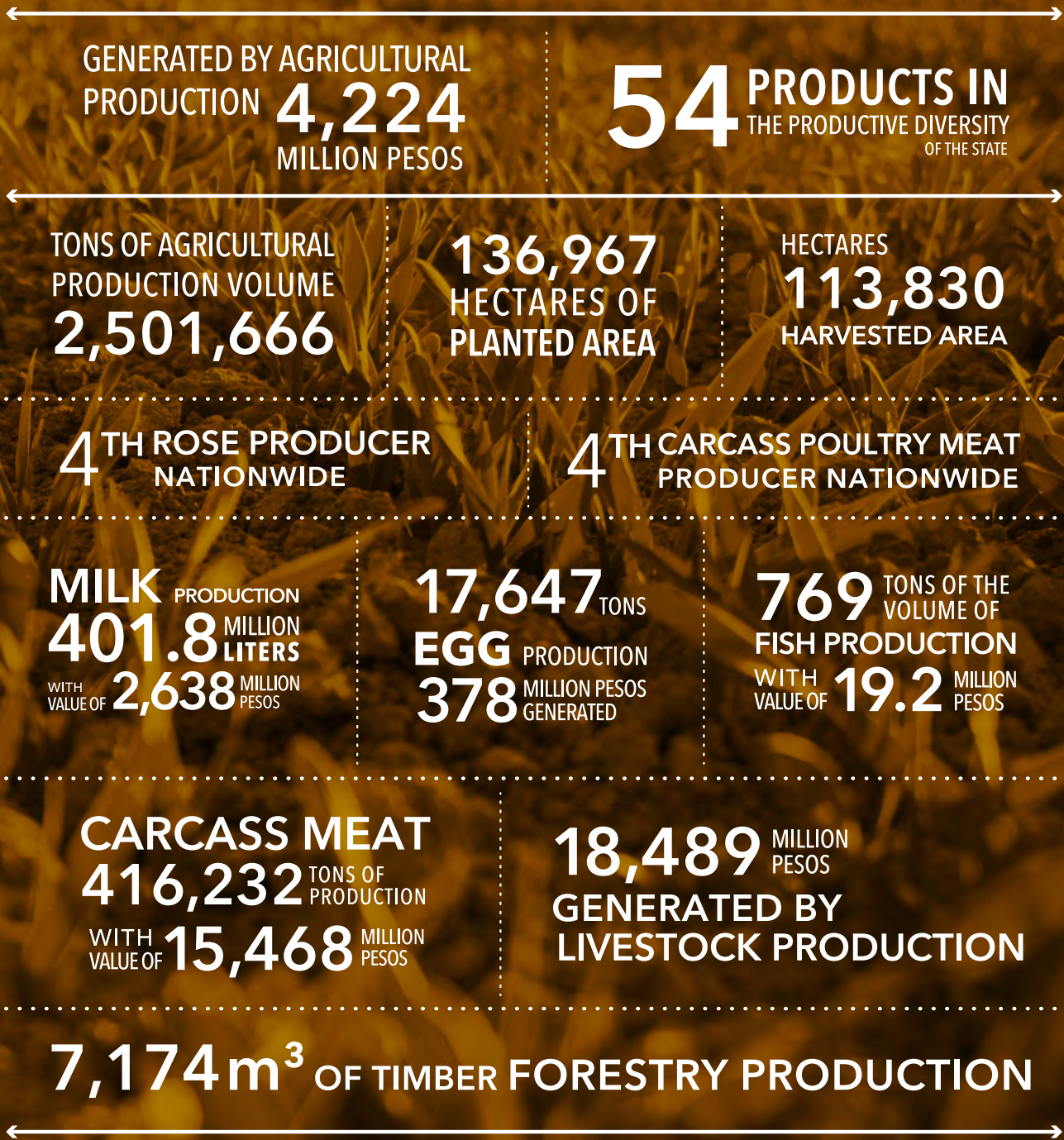


The primary sector includes natural resources and the way in which they are produced and managed to optimize their consumption and benefit the population.

Beyond the amount of production and richness in the variety of the products, the primary sector is vital for Querétaro since the income of numerous families and inhabitants of the rural areas depend on it.

Querétaro has a leading role within the primary sector due to the noble quality of its fields and its people, which is why it will always be a priority to maintain and promote its productivity.

## PRIMARY SECTOR





# 4.1. Activities of the primary sector

The primary sector represents man’s main source of food and survival. Along with water, food is the most important resource to ensure the health and well-being of Mexican families.

The main activities within the sector are: agriculture, livestock, silviculture, apiculture, aquaculture, hunting, fishing, forest exploitation and mining.

## 4.1.1. Farming

### Featured crops

In 2019 Querétaro registered 2,501,666 tons of agricultural products with a value of 4,224,375,000.00 pesos. The following stand out:

- Early harvested fodder corn with 754,210 tons, valued at 516,531,920 pesos.
- Early harvested alfalfa with 557,863 tons, with a production value of 376,507,170 pesos.
- Rose whose production was of 464,431 grosses and 126,151,600 pesos
- Grain corn, whose production was 221,990 tons and 845,200,840 pesos.
- Early harvested fodder oats, with 119,827 tons and a value of 63,108,420 pesos.



### Agricultural ranking

On a national level, the production and commercialization of decorative plants and flowers make up one of the sectors with the greatest potential for development in the field of microenterprises. Today the vision has widened towards international markets, looking for potential customers in the United States, Canada and the European Union.

Querétaro ranks 8<sup>th</sup> nationwide in the production of broccoli, going from 10,054 tons in 2018 to 12,202 in 2019. This represents a growth of 21.4%.

Another product on the rise is cauliflower, the entity ranks seventh place nationwide and increased its quantity from 3,974 tons in 2018 to 4,544 in 2019.

The following table shows the behavior of state agricultural activity, according to the product and its national position:

National ranking of the volume of agricultural production in the state of Querétaro, 2019.					
Product	2018 Ranking	2019 Ranking	Volume (tons)		Variation 2018-2019
			2018	2019	
Rose (thick)	3	4	608,330.00	464,431	-23.7%
Asparagus	5	6	6,592.19	1,680	-74.5%
Lettuce	5	6	26,548.82	23,905.01	-10.0%
Industrial grape	6	5	2,090.39	1,545.40	-26.1%
Cauliflower	7	7	3,974.04	4,544.54	14.4%
Barley grain	8	8	28,749.10	22,103.50	-23.1%
Fodder corn	8	8	752,423.10	754,210.52	0.2%
Blackberry	9	9	31.10	18.30	-41.2%
Broccoli	9	8	10,054.31	12,202.47	21.4%

Source: Agri-food and Fishing Information Service (SIAP). Ministry of Agriculture and Rural Development (SADER). Consultation Agrifood Information System (SIACON).

The year 2019 presented adverse conditions that led to a contraction in the collection of products such as grain barley, roses, asparagus, industrial grapes, among others. However, Querétaro continues to be a benchmark and is one of the main entities in its production.



Wine entities

Querétaro has a wide variety of climates and microclimates; this factor has led to the harvest of grapes and to the development of winemaking in the region.

The semi-arid or semi-desert climate is the most common, covering almost 40% of the state’s surface area with a notable emphasis on the municipalities of Tequisquiapan and Ezequiel Montes. These are the main cultivation areas, an activity that has fostered the development of the local economy, tourism and the economic surge in the region.



Main wine entities in Mexico and their grape varieties.



Source: Agri-food and Fishing Information Service (SIAP), 2012-2018 Agri-food Atlas, First Edition.



Agricultural cycles

According to the production output, the participation in each cycle was as follows: spring-summer contributed 57.3%; autumn-winter 26.6%; and perennials 16%, all according to the irrigation and rainfed modality.

It should be noted that of the 57.3% comprising the spring-summer cycle, the irrigation modality contributed 91.2% and the rainfed modality 8.8%. Irrigated crops represented 94.6% of the total production output, which constitutes the largest contribution within each of the agricultural cycles.

The following table shows the behavior of the year 2019 in detail. The cycles and their main figures are shown:

Agricultural production 2019.					
Agricultural cycle	Modality	Sown area (ha)	Harvested area (ha)	Production (ton)	Production value (thousands of pesos)
Spring Summer	Irrigation	38,181.30	37,597.63	1,073,924.90	2,209,227.37
	Rainfed	73,769.58	51,683.41	51,532.61	212,055.83
Spring - summer cycle total		111,950.88	89,281.04	1,125,457.51	2,421,283.20
Autumn Winter	Irrigation	14,480.00	14,480.00	322,491.93	1,124,776.25
	Rainfed	411.00	411.00	409.38	914.06
Total of the autumn - winter cycle		14,891.00	14,891.00	322,901.31	1,125,690.31
Perennial crops	Irrigation	8,906.80	8,699.50	1,052,061.28	660,492.26
	Rainfed	1,218.50	958.50	1,246.71	16,909.24
Total perennial crops		10,125.30	9,658.00	1,053,307.99	677,401.50
Total agricultural production		136,967.18	113,830.04	2,501,666.81	4,224,375.01

Source: Agrifood and Fishing Information Service (SIAP). Ministry of Agriculture and Rural Development (SADER). Consultation Agrifood Information System (SIACON). Note: The total production of perennial crops corresponds to 464,431 rose grosses (decorative), 587,630.28 tons of irrigation and 1,246.71 tons of rainfed.

Main products per cycle

The top 10 products per cycle are shown in the following table, where early harvested fodder oats stand out in the first places for the autumn-winter cycle, early harvested fodder corn for the spring-summer cycle, and early alfalfa within the perennial cycle that stands out both at the state and national level:

Top products by cycle, 2019.						
Position	Autumn Winter	Production (ton)	Spring Summer	Production (ton)	Perennials	Production (ton)
1	Early harvested fodder oats	115,596.90	Early harvested fodder corn	754,210.52	Green alfalfa	557,863.64
2	Early harvested fodder wheat	64,990.50	Corn grain	221,741.72	Rose (grosses)	464,431.00
3	Tomato	49,028.50	Tomato	58,486.58	Grass and pastures	21,494.12
4	Barley grain	22,094.50	Green chili pepper	23,192.69	Orange	2,126.50
5	Carrot	19,452.00	Lettuce	12,458.31	Nopalitos	1,727.81
6	Lettuce	11,446.70	Green tomato	9,519.44	Asparagus	1,680.05
7	Green chili pepper	8,154.00	Broccoli	7,584.80	Grape	1,545.40
8	Onion	6,446.40	Early harvested sorghum	6,473.96	Apple	713.61
9	Green tomato	4,866.23	Onion	5,311.67	Prickly Pear	364.37
10	Broccoli	4,617.67	Early harvested fodder oats	4,230.12	Avocado	331.17

Source: Agrifood and Fishing Information Service (SIAP). Ministry of Agriculture and Rural Development (SADER). Consultation Agrifood Information System (SIACON).



Productive diversity

During the year 2019, agricultural production in Querétaro diversified into 54 products:

Productive diversity of the state of Querétaro 2019.				
Open air				
Cereals	Fruit trees	Vegetables	Industrial	
- Barley grain	- Avocado	- Garlic	- Cherry coffee	
- Corn grain	- Peach	- Artichoke	- Grape	
- Wheat grain	- Pomegranate	- Celery		
	- Guava	- Broccoli		
	- Lemon	- Squash	Dried vegetables	
Fodder	- Mango	- Onion	- Pea	
- Green alfalfa	- Apple	- Dried chili	- Bean	
- Early harvested fodder oats	- Orange	- Green chili pepper	- Chickpea grain	
- Fodder chickpea	- Nut	- Cauliflower		
- Early harvested	- Pear	- Corn	Oilseeds	
- Fodder corn	- Prickly pear	- Asparagus	- Peanut	
- Grass and pastures	- Blackberry	- Spinach		
- Early harvested fodder sorghum		- Jicama		
- Grain sorghum		- Lettuce		
- Early harvested fodder wheat		- Nopalitos	Tubers	
		- Red tomato (tomato)	- Sweet potato	
		- Green tomato		
		- Carrot		
Greenhouse				
- Green chili pepper	- Cucumber	- Rose (grosses)	- Red tomato (tomato)	- Mushrooms and champignons

Source: Agrifood and Fishing Information Service (SIAP). Ministry of Agriculture and Rural Development (SADER). Consultation Agrifood Information System (SIACON).

Harvested area

During the autumn-winter 2019 agricultural cycle, crops were distributed into four groups: cereals, fodders, vegetables and dried legumes. 83.4% is distributed in cereals with 37.7% and fodders with 45.8%.

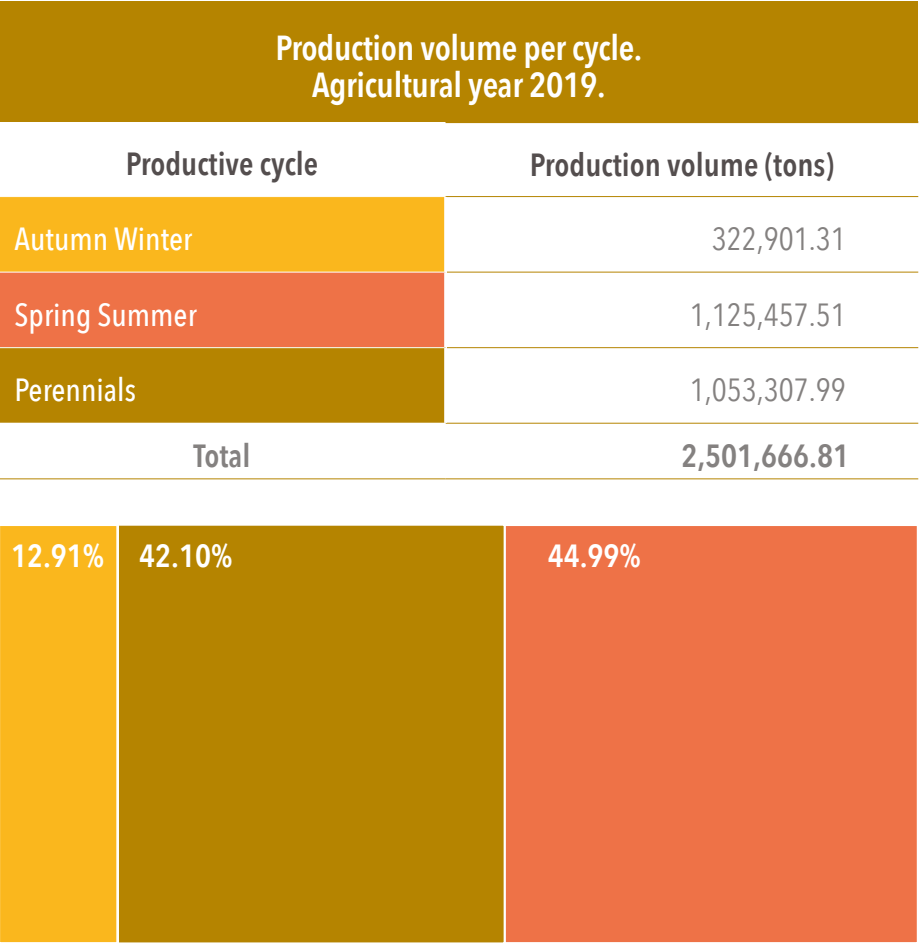
During the harvest of the spring-summer cycle, the following results were obtained, where the cereal group stands out with 67 thousand hectares.

95.4% of the perennial crops of the period were harvested successfully. Fodders and fruits concentrated 92% of the harvest.



Volume of agricultural production

The 2019 agricultural period represented a production of more than 2,500,000 tons. The following was the distribution by production cycle:



Source: Agri-food and Fishing Information Service (SIAP). Ministry of Agriculture and Rural Development (SADER). Consultation Agrifood Information System (SIACON).  
Note: The total production of perennial crops corresponds to 464,431 rose grosses (decorative), 587,630.28 tons of irrigation and 1,246.71 tons of rainfed.

Of the total production of the 2019 period in the autumn-winter cycle, more than half, with 56.8% of the volume, corresponds to fodders and 35.4% to vegetables.

For the same year, now in the spring-summer cycle, fodders occupied the highest percentage of production once again, with 68.2%, followed by cereals with 19.7%.

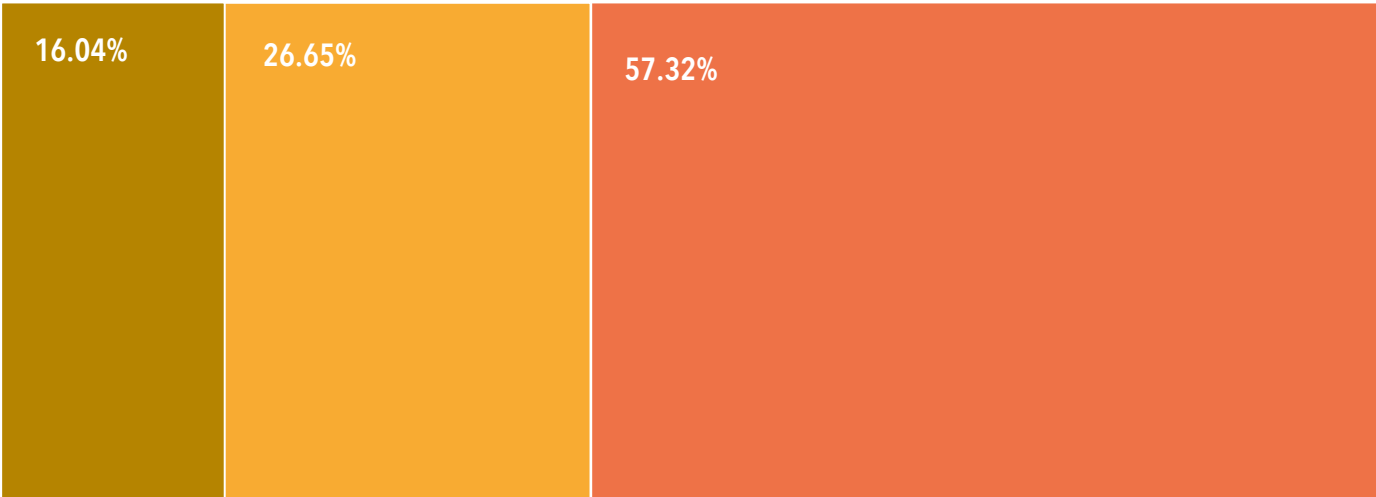
In the case of perennial crops, fodders stood out with 579,357.76 tons in the 2019 agricultural cycle and decorative plants stood out with 464,431 rose grosses.



Value of agricultural production

The following tables show the importance of production according to its value in the 2019 cycle. More than half of the production was registered during the spring-summer period:

Agricultural production value per cycle, 2019.	
Productive cycle	Production value (thousands of pesos)
Autumn Winter	1,125,690.31
Spring Summer	2,421,283.20
Perennials	677,401.49
Total	4,224,375.00



Source: Agri-food and Fishing Information Service (SIAP). Ministry of Agriculture and Rural Development (SADER). Consultation Agrifood Information System (SIACON).

In 2019 the highest contributions by agricultural cycle were the following: for the autumn-winter cycle: vegetables with 75.7%; for the spring-summer cycle: cereals and vegetables with 72.6%; and in the case of perennial crops: fodders, vegetables and decorative plants, jointly, with 89.2% of the total.



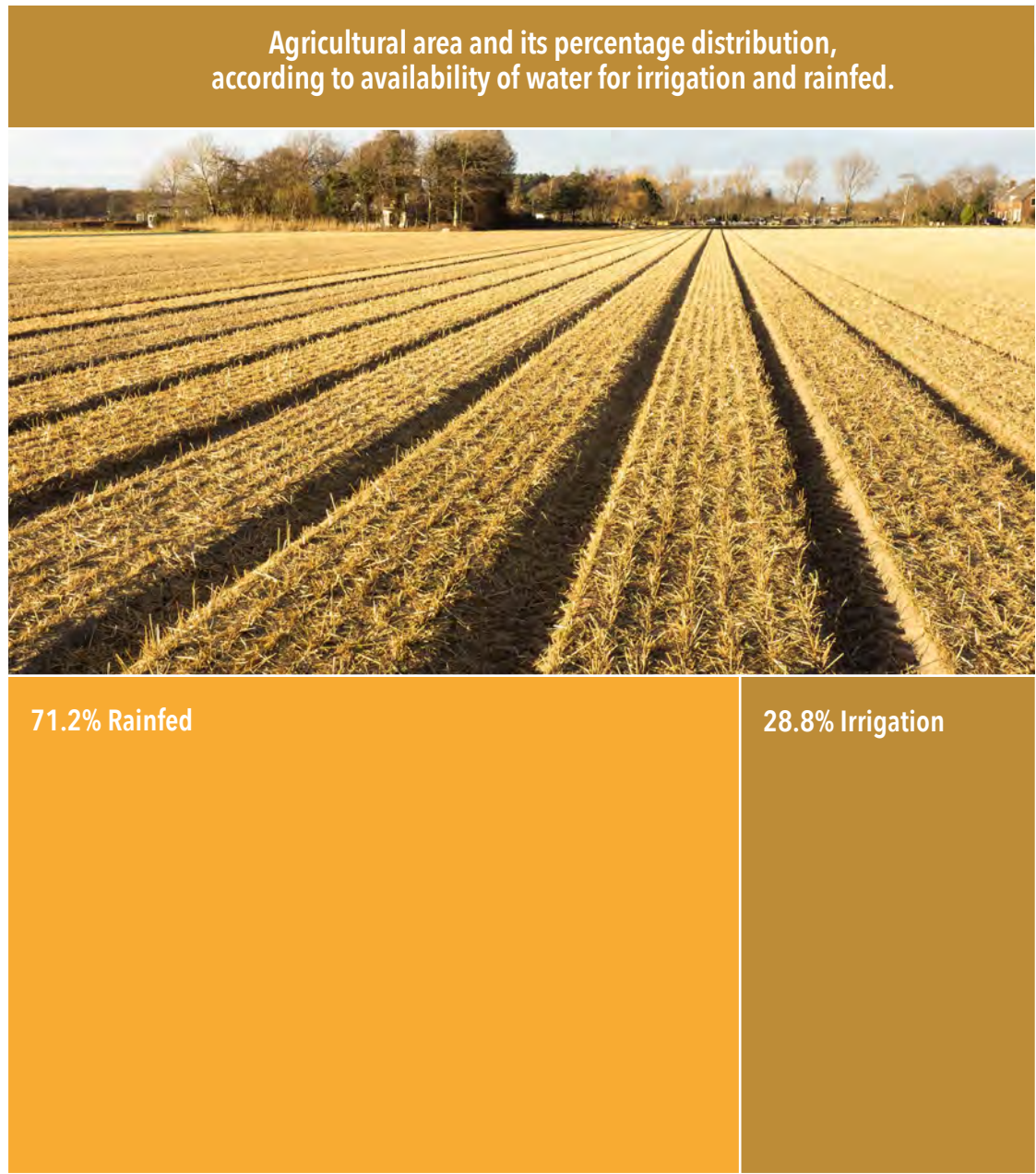


# 4.1.2 Agricultural resources

Agricultural products require fertile soil, water and the workforce of farmers. It is fundamental to understand these resources are basic for the welfare and productivity of the field.

## Field infrastructure

About 70% of the agricultural surface area is rainfed and 30% of it has irrigation. There are 237,000 hectares in the 18 municipalities, which are distributed into the production units as shown in the following table:



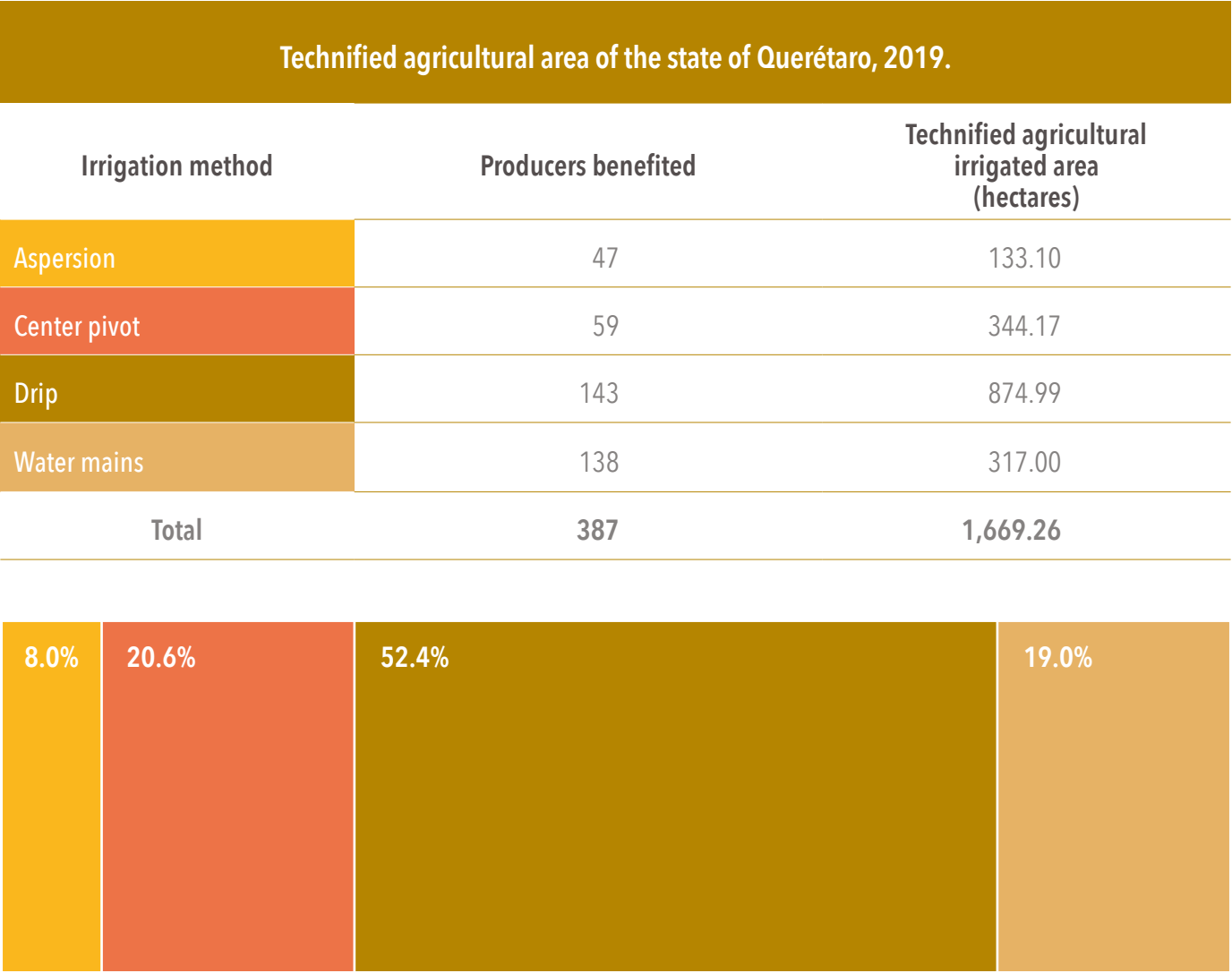
Production units with agricultural area and their distribution, according to availability of water for irrigation and rainfed area, by municipality.						
Municipality	Production units	Agricultural area				
		Total (hectares)	Irrigation		Rainfed	
			Production units	Hectares	Production units	Hectares
Amealco de Bonfil	7,198.00	28,893.00	2,635.00	7,948.50	5,440.00	20,944.50
Arroyo Seco	829.00	7,244.80	145.00	606.70	731.00	6,638.00
Cadereyta de Montes	4,244.00	12,874.80	279.00	271.70	4,030.00	12,603.00
Colón	2,421.00	14,407.90	433.00	4,725.30	2,101.00	9,682.60
Corregidora	1,106.00	9,185.20	274.00	2,909.50	914.00	6,275.70
El Marqués	2,848.00	21,805.50	990.00	10,396.70	2,183.00	11,408.80
Ezequiel Montes	835.00	7,576.20	197.00	3,662.40	686.00	3,913.90
Huimilpan	2,042.00	13,824.10	423.00	4,124.00	1,796.00	9,700.10
Jalpan de Serra	1,192.00	15,889.30	81.00	339.90	1,147.00	15,549.40
Landa de Matamoros	1,335.00	12,357.40	2.00	2.80	1,333.00	12,354.60
Pedro Escobedo	2,304.00	14,069.90	1,362.00	10,140.60	1,226.00	3,929.30
Peñamiller	1,313.00	3,971.10	795.00	2,048.40	611.00	1,922.70
Pinal de Amoles	2,172.00	11,448.20	77.00	1,183.90	2,104.00	10,264.30
Querétaro	3,365.00	16,727.70	282.00	2,311.60	3,193.00	14,416.10
San Joaquín	770.00	2,761.00	89.00	75.90	688.00	2,685.10
San Juan del Río	6,084.00	26,110.40	1,803.00	8,835.20	4,767.00	17,275.20
Tequisquiapan	1,847.00	11,487.00	654.00	5,918.70	1,421.00	5,568.30
Tolimán	1,270.00	6,398.10	701.00	2,758.20	634.00	3,639.90
Total	43,175	237,031.6	11,222	68,260	35,005	168,771.5

Source: Statistical Yearbook of the Rural Sector 2015. Ministry of Agricultural Development of the Executive Power of the State. National Statistics and Geography Institute. Agricultural Census, 2007 and VIII Agricultural, Livestock and Forestry Census. Aguascalientes, Ags., 2009. Consulted in 2021.





The Ministry of Agricultural Development of the State of Querétaro (SEDEA for its Spanish acronym) reports that in 2019 the technified agricultural area was 1,669.26 hectares, benefiting 387 producers. The most used irrigation method is the drip irrigation method. The following table details the information:



Source: Ministry of Agricultural Development. Directorate of Hydro-agricultural Infrastructure.

Land under communal regime and communities

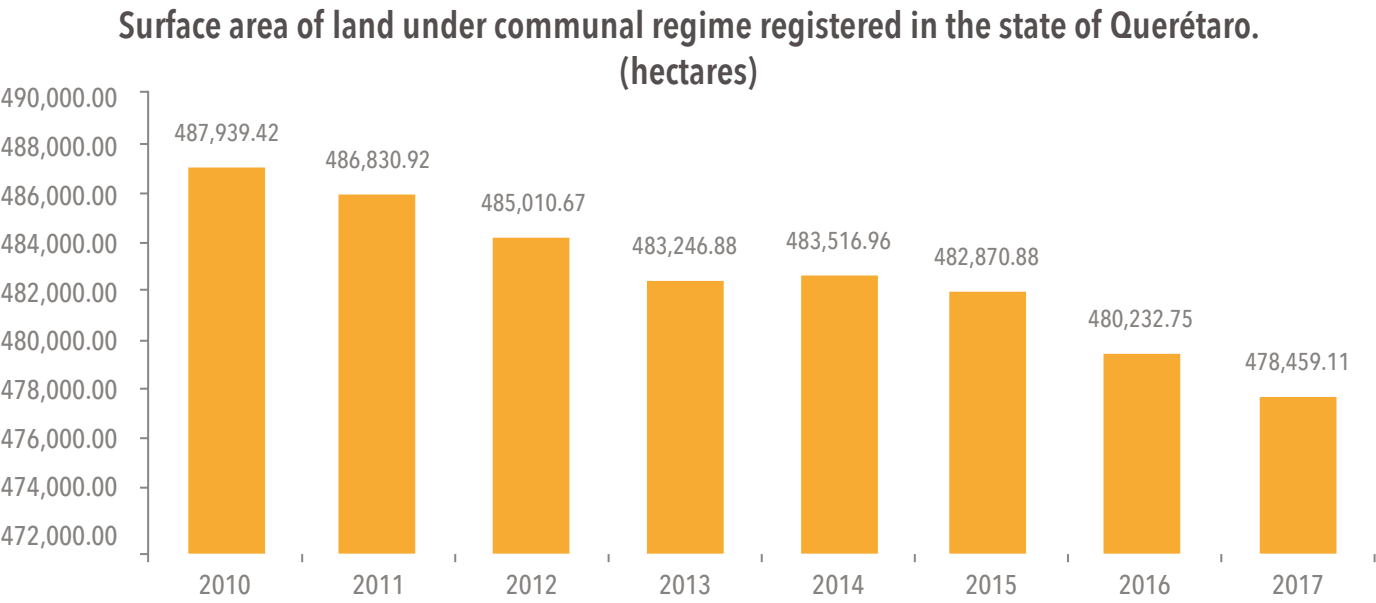
There are 380 land plots under communal regime and communities distributed in the 18 municipalities of the state, according to the National Agrarian Registry (RAN for its Spanish acronym). From that total, 56% are located in the municipalities of San Juan del Río, Colón, Querétaro, El Marqués and Cadereyta de Montes. Altogether they cover an area of 536,305 hectares.

Municipality	Land under communal regime and communities	Municipality	Total area (hectares)
San Juan del Río	52	Cadereyta de Montes	103,635.22
El Marqués	43	San Juan del Río	53,071.89
Colón	41	Colón	49,656.33
Querétaro	40	Peñamiller	46,420.73
Cadereyta de Montes	37	Arroyo Seco	44,544.37
Amealco de Bonfil	24	Amealco de Bonfil	36,630.20
Pedro Escobedo	19	El Marqués	35,363.09
Pinal de Amoles	19	Querétaro	30,837.44
Corregidora	17	Pinal de Amoles	22,167.71
Peñamiller	16	Pedro Escobedo	21,932.11
Huimilpan	15	Tequisquiapan	17,317.91
Arroyo Seco	13	Huimilpan	14,825.69
Tequisquiapan	12	Tolimán	14,825.00
Tolimán	10	Jalpan de Serra	11,715.70
Ezequiel Montes	8	Corregidora	11,087.52
Jalpan de Serra	6	San Joaquín	10,968.14
Landa de Matamoros	4	Ezequiel Montes	7,667.42
San Joaquín	4	Landa de Matamoros	3,638.92
Total	380	Total	536,305.41

Source: Open Data. National Agrarian Registry (RAN) - Rural Cadastre, 2021.



The surface area of land under communal regime registered by the RAN has decreased since 2010, when there were more than 487,939.42 hectares. In contrast, the 2017 registry shows 478,459.11 hectares, an amount that indicates a decrease of 9,480 hectares.



Source: Open Data. National Agrarian Registry (RAN) - Rural Cadastre, 2021.

The following table shows the number of individuals in Querétaro by agrarian capacity:

Individuals by agrarian capacity in the state of Querétaro.		
Ejidatarios	Women	6,825
	Men	16,777
	Total	23,602
Copropietor	Women	940
	Men	2,174
	Total	3,114
Possessors	Women	5,533
	Men	13,107
	Total	18,640
Neighborhood	Women	737
	Men	1,884
	Total	2,621
Total		47,977

Source: Open Data. National Agrarian Registry (RAN) - Rural Cadastre, 2021.

### Price of agricultural supplies

According to the National System of Information and Integration of Markets, in Querétaro the prices per ton of the main agricultural supplies during 2020 were the following:

Price of agricultural supplies by commercial presentation, Querétaro. Records from the second half of December 2020.					
Product	Concentration	Presentation	Source	Municipality	Frequent price
Potassium chloride	00-00-60	Ton	Producer	Querétaro	6,494.22
Triple 17 npk complex	17-17-17	Ton	Producer	Querétaro	7,765.26
Stamina		Ton	Producer	Querétaro	6,653.10
Diammonium phosphate	18-46-00	Ton	Producer	Querétaro	8,937.00
Ammonium sulphate	20.5-00-00	Ton	Producer	Querétaro	4,090.00
Simple superphosphate	00-20-00	Ton	Producer	Querétaro	3,190.00
Urea	46-00-00	Ton	Producer	Querétaro	6,851.70

Source: National System of Information and Integration of Markets (SNIIM). Ministry of Economy.

### Price of agricultural products

The average price of the main agricultural products sold in the Mercado de Abastos de Querétaro (The Central Market of Querétaro) according to their presentation, was as follows:

Average wholesale price of basic grains, in the Mercado de Abastos de Querétaro, during December 2020.	
Product	Monthly average <sup>1</sup>
Sinaloa rice	16.52
Morelos type rice	25.30
Flor de Junio Bean	24.80
Flor de Mayo Bean	24.90
Black bean	20.40
Imported Black Beans	23.60
Peruvian bean	51.50
Big chickpea	27.00
Bean	60.00
Lentil	18.40
White corn	5.38

Source: National System of Information and Integration of Markets (SNIIM). Ministry of Economy.

<sup>1</sup> Average price per kilogram marketed in a 50 kg package.

<sup>1</sup> Monthly average of frequent prices reported from the first business day to the last of the month.





# 4.2. Livestock

## 4.2.1. Livestock production

The livestock or cattle subsector is the most relevant within the primary activities of Querétaro. The high quality of its products has made it stand out and achieve national prestige as one of the best in the region.

### Productive diversity

Querétaro offers a wide variety of livestock products. Some of them are the following: carcass meat such as poultry, beef, pork, ovine, caprine, turkey and rabbits; bovine and caprine milk; eggs, honey and beeswax.

Each municipality of the state offers a diversity of livestock products according to its own characteristics, capacities, infrastructure and resources.

### Production volume

The volume and value of livestock production is divided into three groups: carcass meat, milk and other products.

The production of carcass meat for the year 2019 was of 416,232 tons, the municipality of Ezequiel Montes is the leading municipality in carcass meat production with 22.2% of the total; Colón follows with 18.1%; Tequisquiapan contributes with 17.6%; and 42.1% corresponds to the rest of the municipalities. The three main producers accumulate 60.8% of the poultry carcass meat production, leaving 39.2% to the remaining 15 municipalities.

Eggs represent 99.6% of the total production of other livestock groups that include egg, honey and beeswax, with a total volume of 17,725.6 tons.

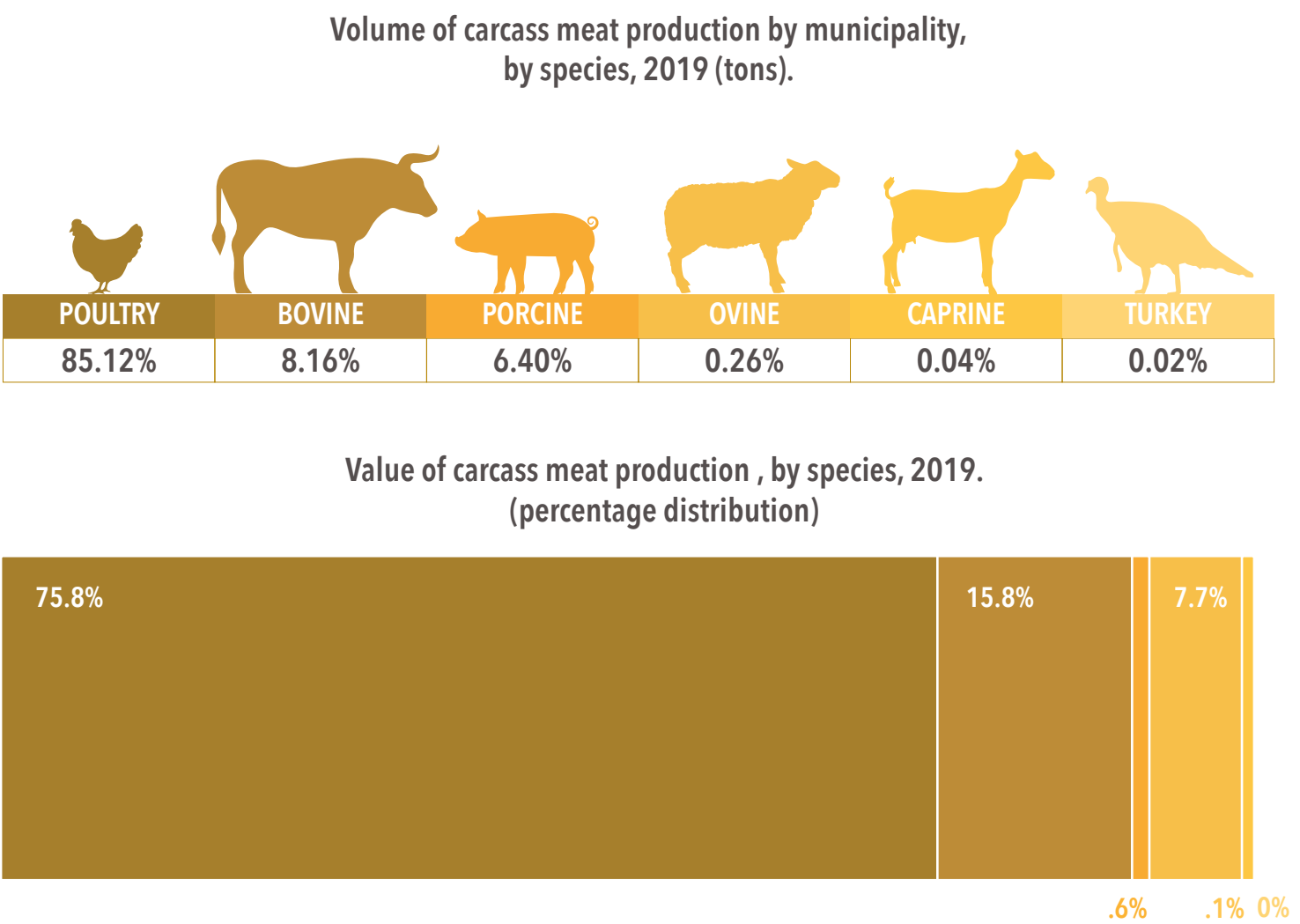
Over 400 million liters of milk were produced in the state in 2019, 99.4% of bovine origin and 0.6% of caprine origin. The municipalities of El Marqués, Colón and Pedro Escobedo are leaders in its production.

### Production value

During 2019 the total production of carcass meat exceeded 15,000 million pesos. The production of poultry meat represented 75.8%; meat of bovine origin represented 15.8%; and the remaining 8.4% was from porcine, ovine, caprine and wild turkey origin.

The municipalities of Ezequiel Montes, Tequisquiapan and Colón contribute the most with 24.1%, 16% and 15.9% respectively. The following graph shows the behavior throughout the entity:

In 2019, the value of the livestock group that produces eggs, honey and beeswax, exceeded 380 million pesos; egg alone had a value of 378 million pesos, leaving honey and beeswax behind.



Source: Agri-food and Fishing Information Service (SIAP). Ministry of Agriculture and Rural Development (SADER). Consultation Agrifood Information System (SIACON).



Querétaro and San Juan del Río were the most productive municipalities, generating 73.1% and 20.9% of this production respectively.

The dairy industry in Querétaro generated the highest production value in El Marqués, a municipality that participated with 35.1%, followed by Colón with 30.8%.

The total value of the livestock production of Querétaro amounted to 18,489,131,800 pesos during 2019. Ezequiel Montes, Colón and Tequisquiapan are the leading municipalities in the sector:

Production value of other farming products by municipality, 2019. (thousands of pesos)	
Municipality	Total
Amealco de Bonfil	931,960.52
Arroyo Seco	18,135.52
Cadereyta de Montes	527,215.74
Colón	3,308,063.23
Corregidora	353,471.90
El Marqués	2,580,224.91
Ezequiel Montes	3,747,056.99
Huimilpan	742,221.39
Jalpan de Serra	43,258.33
Landa de Matamoros	27,155.41
Pedro Escobedo	914,735.29
Peñamiller	20,086.65
Pinal de Amoles	17,798.68
Querétaro	1,445,618.36
San Joaquín	13,422.83
San Juan del Río	658,940.76
Tequisquiapan	2,620,877.78
Tolimán	518,887.51
Total	18,489,131.80

Source: Agrifood and Fishing Information Service (SIAP). Ministry of Agriculture and Rural Development (SADER). Consultation Agrifood Information System (SIACON).  
Note: Due to rounding of figures, the partial numbers may or may not equal the total.

Livestock inventory

In the last registered year, porcine was the livestock that increased the most with a 6.9% increase, meaning there were 21,933 more pigs than in 2017. The other species showed mostly decreasing variations.

Livestock inventory of the state of Querétaro.				
Species-product	Inventory by number of heads or hives			
	2015	2016	2017	2018
Bee <sup>1</sup>	5,208	2,028	5,475	5,329
Poultry-meat	32,966,766	35,026,027	41,160,908	40,405,765
Poultry-egg	705,962	1,752,292	1,767,730	1,499,327
Bovine-meat	217,164	224,767	216,189	224,779
Bovine-milk	107,659	111,906	112,940	115,660
Caprine	99,408	99,021	102,033	98,124
Turkey	20,114	20,467	20,146	20,194
Ovine	158,185	154,576	158,726	145,908
Porcine	311,699	308,458	319,260	341,193

Source: Agrifood and Fishing Information Service (SIAP). Ministry of Agriculture and Rural Development (SADER). Consultation Agrifood Information System (SIACON).  
<sup>1</sup>The unit of measurement for bees is hives.





# 4.3. Aquaculture and Fishing

## 4.3.1. Aquaculture and fishing production

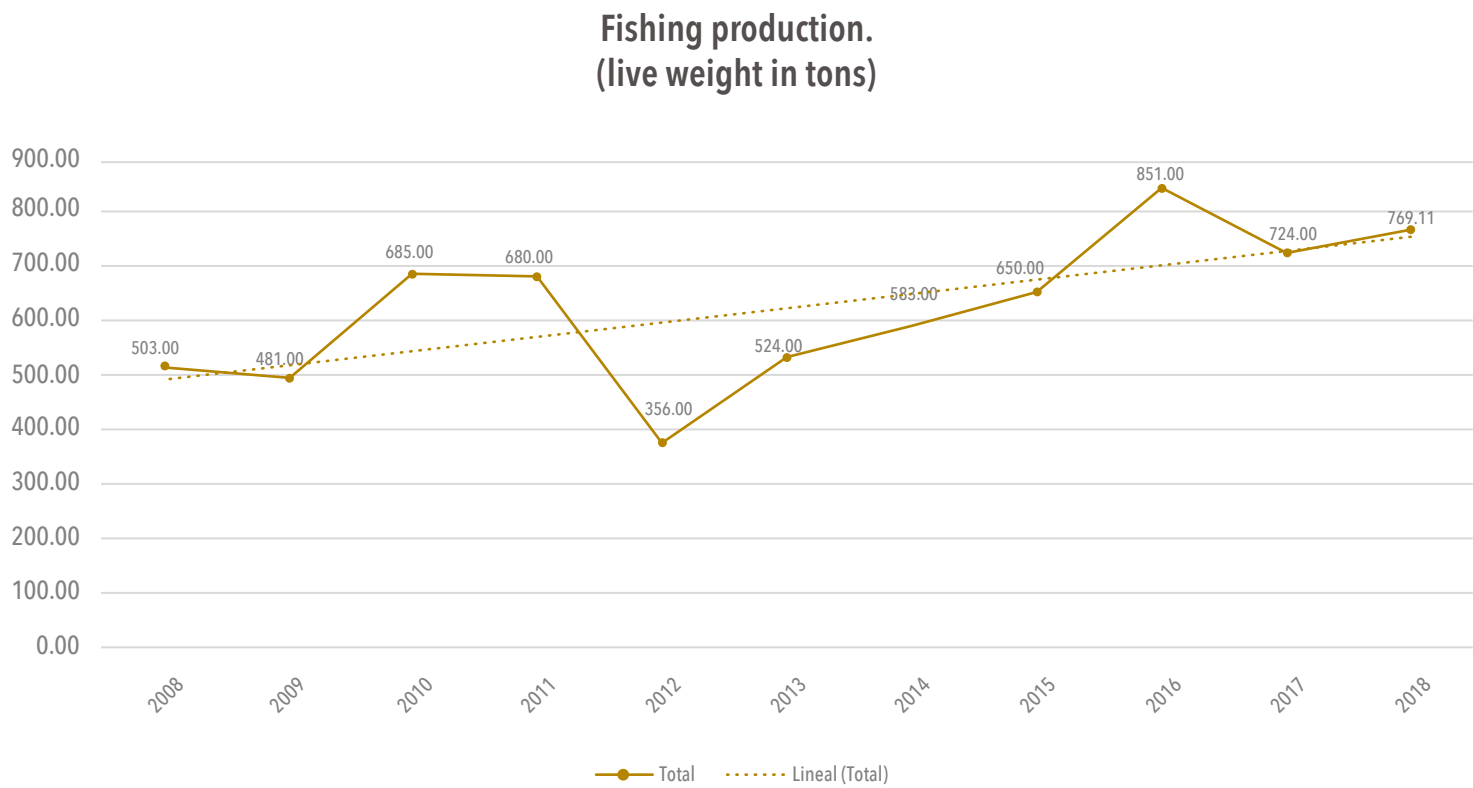
The activity registered within the main bodies of water in Querétaro, both natural and artificial, is considered of medium-scale.

The aquaculture and fishing productive sector’s activity is based mainly on species such as catfish, carp, bluegill and trout.

### Production volume

In 2018 fishing activities produced a total of 769 tons. The two captured species with the highest percentage value were bluegill and carp, with 62.3% and 19.6% respectively. The rest corresponds to catfish, trout, bass and other species, which together add up to 18.1%.

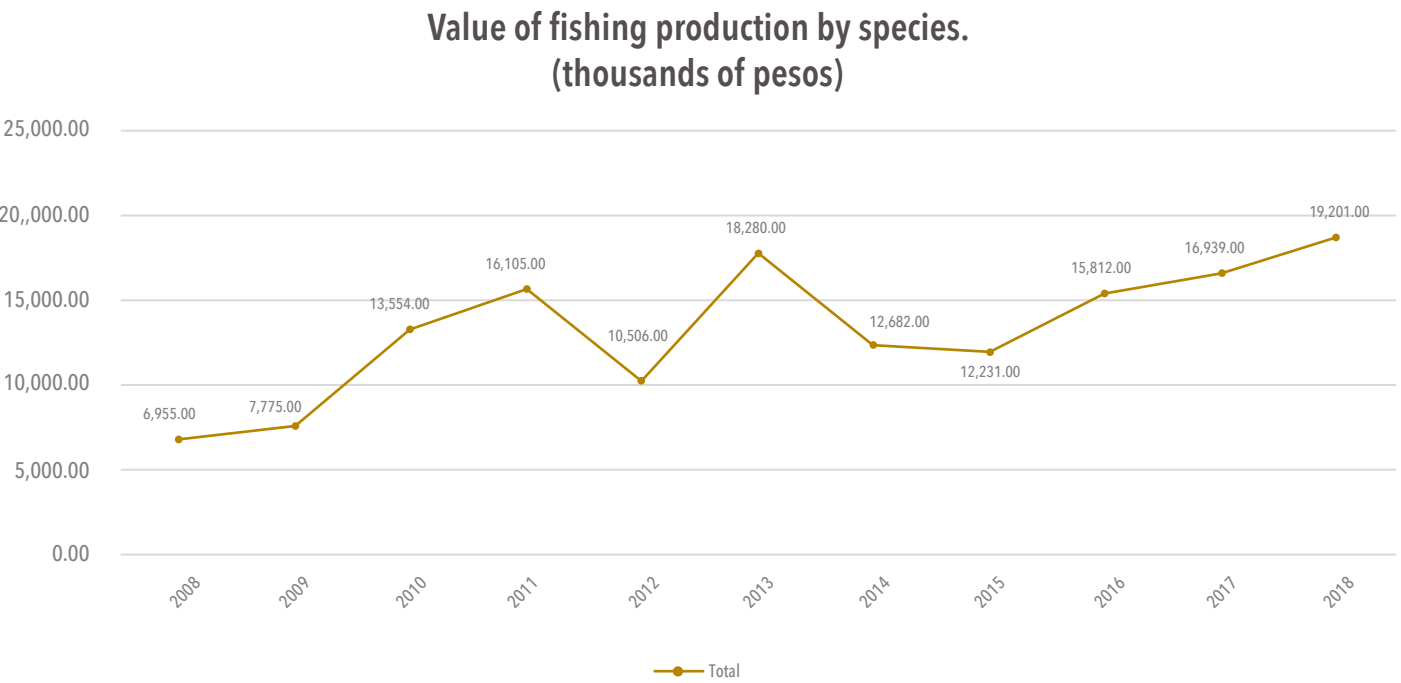
The following graph shows the different variations in the outcome of fish production within the 2008-2018 period.



Source: Aquaculture and Fishing Statistical Yearbook 2018 of the National Aquaculture and Fishing Commission. Agrifood and Fishing Information Service (SIAP). Ministry of Agriculture and Rural Development (SADER). Consultation Agrifood Information System (SIACON).

### Production value

Fish production in 2018 amounted to almost 18 million pesos. The bluegill, carp and trout species as a group represented 81.6% of the state total.



Source: Aquaculture and Fishing Statistical Yearbook 2018 of the National Aquaculture and Fishing Commission. Agrifood and Fishing Information Service (SIAP). Ministry of Agriculture and Rural Development (SADER). Consultation Agrifood Information System (SIACON).





# 4.3.2. Fishing and aquaculture resources

The state of Querétaro, being an inland entity, carries out its fishing activity in the main water storage facilities of the 18 municipalities of the entity. This activity is becoming ever more important, and this benefits the population.

## Fishing companies

The data of the 2018 Statistical Yearbook of Aquaculture and Fishing indicates that there are 172 companies in Querétaro dedicated to fishing activities in the different sectors. 57 of these are dedicated to commercialization, 96 to aquaculture, 18 to capture and one to industrialization.




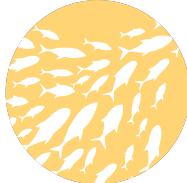
The sector groups 1,114 fishermen, 279 active riverine vessels, 147 production units and one fishing plant, as shown in the following table:

Fishing companies registered by type of activity in Querétaro, 2018.				
Capture	Aquaculture <sup>1</sup>	Industrialization	Commercialization <sup>2</sup>	Total
18	96	1	57	172

Source: Aquaculture and Fisheries Statistical Yearbook 2018 of the National Aquaculture and Fisheries Commission. National Registry of Fishing and Aquaculture.

<sup>1</sup>Economic units registered in the National Registry of Aquaculture and Fisheries (RNP).

<sup>2</sup>INEGI, National Statistical Directory of Economic Units 2017.

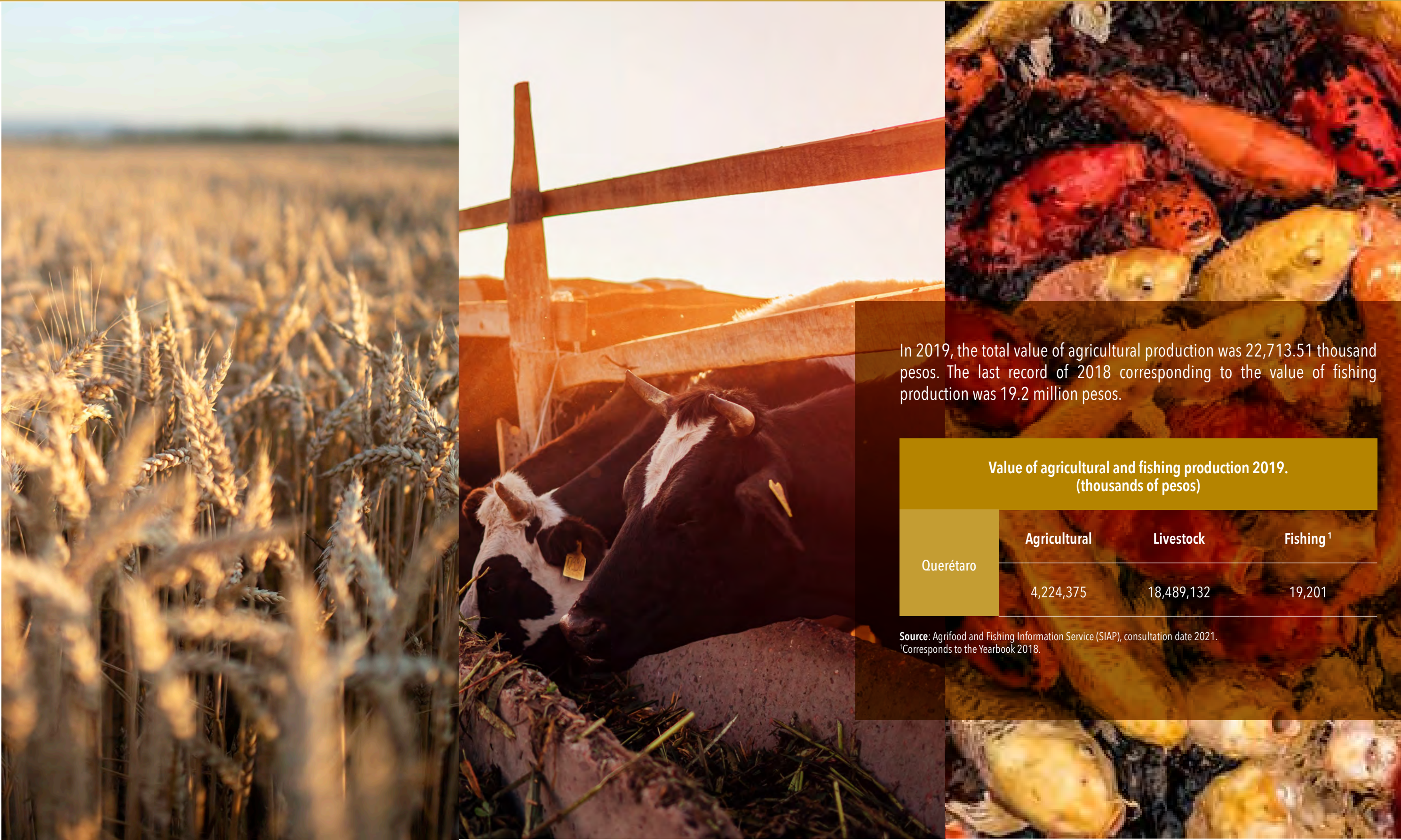
				
Population of fishermen	Active vessels	Fishery plants	Active riverine vessels	Fishing production units
1,114	0	1	279	147

Source: Statistical Yearbook of Aquaculture and Fishing 2018 of the National Commission of Aquaculture and Fishing.





# 4.4. Value of agricultural and fishing production





# 4.5. Forestry

## 4.5.1. Forestry production

In Querétaro, the forestry and fishing subsectors conduct primary activities that are still in the process of growth. State authorities who promote, encourage and boost investment in the sector understand this.

The Sierra Gorda of Querétaro is a setting that provides the necessary resources for entire communities to dedicate themselves to logging and timber production.

### *Productive diversity*

The state's forestry production is divided into two groups:

- Timber: generates round, carved wood, firewood and charcoal derived from pine and oak.
- Non-timber: It produces damiana, oregano and greasewood leaves.

### *Volume and value of timber production*

In 2018, the Ministry of the Environment and Natural Resources (SEMARNAT for its Spanish acronym) reported 7,174 m3 of timber production in Querétaro with oak being the main species with a percentage participation of 96.54% of the total.

Grainwood stands out within the product groups, representing 68.5% of the volume of timber production and 76.1% of the production value.

### *Volume and value of non-timber production*

The volume of non-timber production during 2018 was 21.8 tons. The damiana leaf had the highest production volume with 61%, and 53.9% of the value of non-timber production.

### *Authorizations and authorized volume of exploitation*

In 2018, a total of 25,887,380 m<sup>3</sup> were authorized for use, and there were 10 authorizations for timber harvesting in force at the end of the year.

At the end of the year, the current authorizations for non-timber exploitation amounted to 12, which made it possible to reach a volume of 1,501,486 tons in the state.





# 4.6. Mining

## 4.6.1. Mineral extraction

According to archaeological studies, mining activities in the Sierra Gorda of Querétaro date back to the 10th century. Since those early days, underground mining was carried out to produce cinnabar, also known as mercury and, starting in the 13th century, open pit exploitation was conducted.

Unlike other entities, Querétaro has a strategy to regulate its reserves and mining potential. This has led to prudence in the authorization of mining exploitation in the sector, particularly with foreign producers.

### Diversity of minerals

Gold, silver, copper, lead and zinc are among the metallic minerals that are extracted in the entity. Among the non-metallic ones, stone aggregates, sand and gravel for construction, calcium carbonate, limestone, quarry, kaolin, dimensional rocks and tepetate stand out.

### Production volume and value

According to data from the 2019 Mexican Mining Statistical Yearbook in its 2020 edition, Querétaro registered a mineral production volume of 395 kg of gold and 4,135 kg of silver. Of the volume of non-metallic minerals, 83% were stone aggregates and the remaining 17% included basalt, limestone, Tepetate, and calcite, among others.

The production value of metallic minerals totaled over 383 million pesos and non-metallic minerals exceeded 9 billion pesos.



Volume and value of mining production, 2015 and 2019 Querétaro.  
(tons)

Metallic minerals				
Mineral	2015		2019p/	
	Production <sup>4</sup>	Production value <sup>5</sup>	Production <sup>4</sup>	Production value <sup>5</sup>
Gold	556.8 kg	328,783,264.48	395.00 kg	339,693,716.95
Silver	115,465.00 kg	921,906,218.73	4,135.00 kg	43,318,789.19
Copper	287.00	24,915,187.80	0.00	0.00
Lead	699.00	19,710,290.02	0.00	0.00
Zinc	537.00	16,373,178.38	0.00	0.00
Subtotal metallic minerals	1,639.02	1,311,688,139.41	4.53	383,012,506.14
Non-metallic minerals				
Stone aggregates	7,168,280.00	863,965,791.17	40,218,336.38	5,500,817,888.15
Sand <sup>1</sup>	272,730.00	23,980,363.11	31,139.00	3,403,360.61
Basalt	30,209,300.00	7,873,547,215.29	3,565,500.00	1,054,561,213.55
Calcite <sup>2</sup>	477,000.00	145,724,857.69	532,000.00	118,531,083.91
Limestone	1,330,000.00	103,461,524.58	2,241,000.00	499,301,050.82
Kaolin	130,000.00	296,405,298.47	135,000.00	455,579,041.13
Gravel <sup>3</sup>	105,000.00	5,905,591.68	450,090.00	38,644,472.76
Precious and semi-precious stones	0.00	0.00	85.31	0.00
Rocks	157,018.00	188,421,600.21	693,670.00	917,101,107.00
Tepetate	40,000.00	1,785,865.58	688,000.00	40,795,702.47
Non-metallic minerals subtotal	39,889,328.00	9,503,198,107.78	48,554,820.69	8,628,734,920.40
Total	39,890,967.02	10,814,886,247.19	48,554,825.22	9,011,747,426.54

Source: Statistical Yearbook of Mexican Mining 2019; Edition 2020.  
<sup>1</sup>Mineral for construction.  
<sup>2</sup>Calcium carbonate.  
<sup>3</sup>Figures calculated based on cement consumption.  
<sup>4</sup>Volume of the production is shown in tons, except for gold and silver which are in kilograms.  
<sup>5</sup>Value of the production in current pesos.  
p / Preliminary figures.



Querétaro ranks twenty fifth place nationally in the production of minerals. The exploitation of different minerals gave it its position. In 2019, the mining-metallurgical sector in the entity generated 11,052 jobs. The following table details this information:

Employment in the mining-metallurgical industry, Querétaro, December 2019.	
Carbon, graphite and other non-metallic minerals	759
Metallic minerals	877
Non-metallic mineral products	5,044
Basic metal industries	4,372
Total	11,052
Participation	2.92%

Source: Statistical Yearbook of Mexican Mining, 2019; Edition 2020 with data from the Annual Report, 2020; Mining Chamber of Mexico, CAMIMEX; with contribution from Coordination of Affiliation and Validity, IMSS.

### 4.6.2. Mineral resources

The resources of this subsector are made up of minerals with a controlled use. Due to the limited number of resources, Querétaro regulates its exploitation capacity.

#### Mineral regions

The entity has four regions of metallic minerals: Pinal de Amoles, San Joaquín, Bernal and Querétaro. There are also five regions of non-metallic minerals: Cadereyta, Bernal, Colón, Querétaro and Amealco de Bonfil.





The mining regions are grouped according to their area, type of mineral and type of deposit:

Regions of metallic minerals of the state of Querétaro.			
Region	Zone or district	Mineral	Type of deposit
I. Pinal de Amoles	1. Ánimas 2. Río Blanco 3. El Soyatal 4. Plazuela 5. Bucareli	Gold, silver, lead, zinc, mercury and antimony	Mantles, chimneys, skarn zones and veins
II. San Joaquín	6. Maconí 7. Santo Entierro 8. San Juan Nepomuceno 9. Calabacillas	Gold, silver, lead, zinc, copper and mercury	Chimneys, skarn and scattered mantles
III. Bernal	10. San Martín 11. San Antonio	Gold and silver	Chimneys, veins and mantles
IV. Querétaro	12. San Pedrito	Gold and silver	Vein deposits and massive

Source: Mining Panorama of the State of Querétaro, December 2019, Mexican Geological Survey.

Non-metallic mineral regions of the state of Querétaro.		
Region	Zone or District	Substance
V. Cadereyta	1. Marbles: Vizarrón	Marble, calcium carbonate
VI. Bernal	2. Dimensional rocks.	Limestone
VII. Colón	3. Opal: Tequisquiapan 4. Kaolin: Ezequiel Montes	Opal, kaolin, ashlar
VIII. Querétaro	5. Ornamental materials 6. La Cañada	Quarries
IX. Amealco	7. Amealco	Resizable rock and ashlar.

Source: Mining Panorama of the State of Querétaro, December 2019, Mexican Geological Survey.





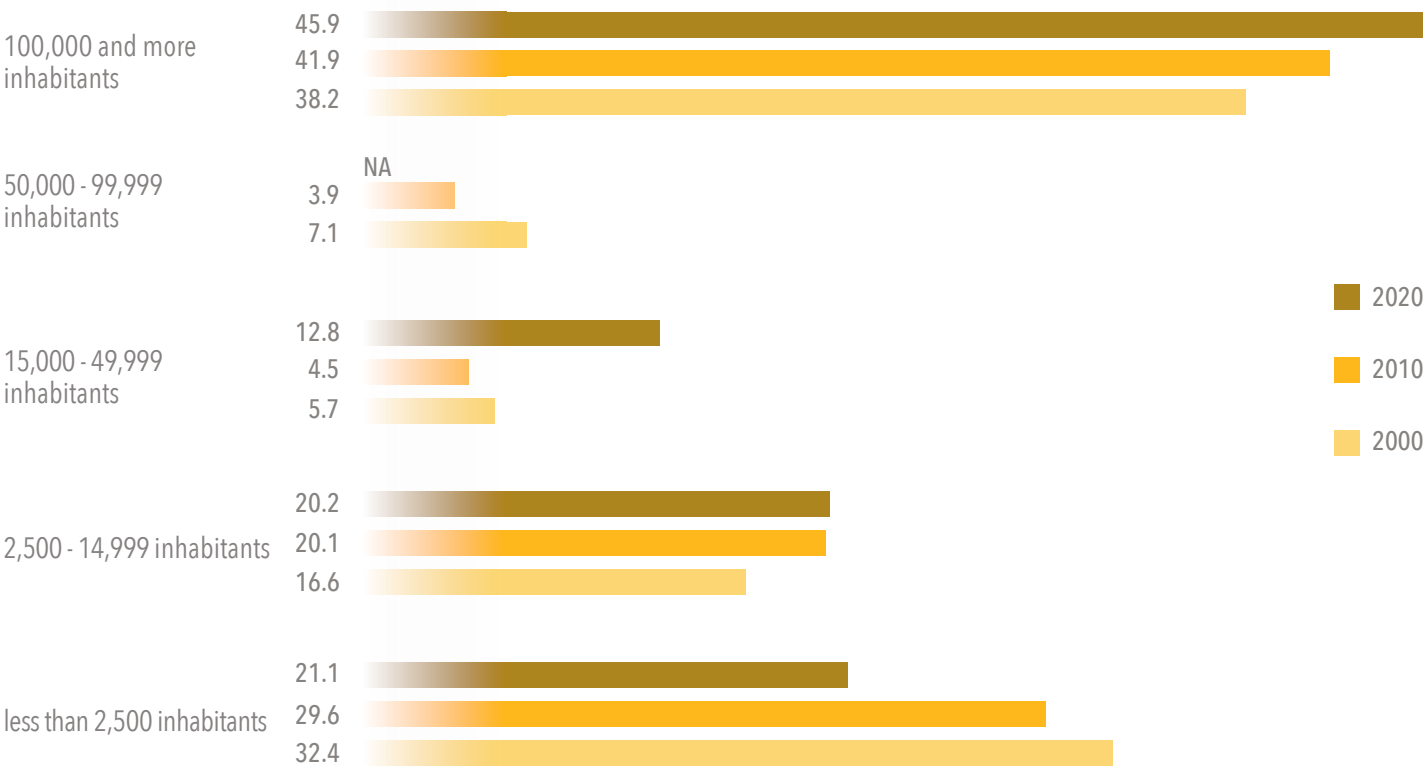
# 4.7. Inhabitants in rural areas

According to information from the 2020 Census of Population and Housing of the INEGI, Querétaro is an increasingly urbanized state. Currently, 58.7% of its inhabitants live in localities with 15,000 or more inhabitants. However, the territorial distribution of its population is concentrated in just a few areas, and its dispersion in numerous localities with less than 15,000 inhabitants; 41.3% of the population is concentrated in these localities.

From the population of children between 3 and 5 years of age who live in localities with less than 2,500 inhabitants, 60.5% attend school, and from children between 6 and 14 years of age, 93.6% attend school.

The following shows the distribution of the population according to the size of the locality:

Percentage distribution of the population by size of locality, 2000, 2010 and 2020.



Sources: National Institute of Statistic and Geography. Census of Population and Housing 2020.

## Employment in the primary sector

According to the National Survey of Occupation and Employment, for the fourth quarter of 2020, there were 6,679,908 people employed in the primary sector nationwide, of which 6,520,239 work in areas with less urbanization.

For the fourth quarter of 2020, 56.7% of the state’s population over 15 years of age was economically active, 93% of them are employed. 4.8% was dedicated to activities in the primary sector, mainly agriculture.

Of the people employed in the primary sector, 41% are over 50 years of age and 65.4%, that is, 27,669 people have incomplete or complete elementary school studies, and 24.7%, that is, 10,453 people have complete junior high school studies. This low level of education represents a challenge when it comes to implementing skill development programs that promote access to technology transfer and high productivity projects.

To detonate the great potential that it has, Querétaro can generate transversal public policies and dynamics that can be applied to its entire population. Eventually these actions will create inertia and social movement so that its inhabitants can have an even more complete and dignified way of life.









The secondary sector is the part of the economy that transforms different raw materials obtained from the primary sector into articles for consumption. It is integrated by all those enterprises involved in this type of activity, whether they are the so-called "micro" enterprises or very big ones. Their dynamism and high returns encourage investments, have a positive economic impact and create more and better employment opportunities, thus increasing competitiveness

## SECONDARY SECTOR

### ECONOMIC INDICATORS

3<sup>RD</sup>  
NATIONAL  
RANKING

ACCORDING TO THE ANNUAL AVERAGE OF THE QUARTERLY  
INDICATOR OF STATE ECONOMIC ACTIVITY 2020

**GDP 533,021** MILLION  
PESOS  
ABOVE THE 2019 GROSS DOMESTIC PRODUCT

**238,050** GDP PER  
PESOS **CÁPITA**

ECONOMICALLY ACTIVE  
INDIVIDUALS

**949,571**

FOURTH  
QUARTER 2020

### SECONDARY SECTOR | QUERÉTARO

**11,585** JOBS  
RECOVERED

SECTOR CONTRIBUTED  
**FDI | 46.5%** IN 2020  
[FOREIGN DIRECT INVESTMENT]

**11.8 POINT**

RECOVERY IN THE VALUE OF  
MANUFACTURING OUTPUTS | 2020

THE PHYSICAL VOLUME INDEX OF  
THE CONSTRUCTION INDUSTRY

**26.33%** INCREASED  
2013 - 2019

**54**

RESEARCH AND TECHNOLOGICAL  
DEVELOPMENT CENTERS  
3,561 RESEARCHERS

**67**

INDUSTRIAL  
PARKS AND ZONES

S&P

RATES QUERÉTARO  
GLOBAL SCALE

**BBB**

**mxAA+** NATIONAL  
SCALE

MOODY'S RATES THE ENTITY

**Aa1.mx** NATIONAL SCALE

**Baa1** GLOBAL SCALE



# 5.1. Economic development

## 5.1.1. Economic dynamics

The state of Querétaro is one of the most dynamic in Mexico and its economic growth is higher than the national average. The high level of development that it holds has allowed it to consolidate its position as a competitive entity that attracts and retains talent and investments.

As a result of the global context of the year 2020, the variables affected and their degree of recovery at the end of the year 2020 will be analyzed.

### Economic growth

The Quarterly Indicator of State Economic Activity (ITAE for its Spanish abbreviation), generated by the INEGI follows, in general terms, the same accounting principles and rules used for the annual calculation of the GDP by state. It provides accurate and timely short-term information regarding the development and the economic situation of the country's states.

In 2020 Querétaro ranked third in the national Economic Activity Index with 120.9 points with seasonal disaggregation figures.

In 2019, the state GDP rose to 403,905.22 million constant pesos, an amount that was 0.6% less than the amount reported in 2018, in line with the signs of economic contraction observed at a national and international level.

Out of the sectors that integrate the economic activity, the tertiary sector is the one that contributes the most to Querétaro's total GDP with 54.9%; followed by the secondary sector with 42.8%; and, finally, by the primary sector that contributes the remaining 2.3%.

Since 2017 economic indicators, such as the GDP by state or the ITAE, established the year 2013 as their new base year. This change allowed for an update of the states' dynamics and their participation in the national GDP.

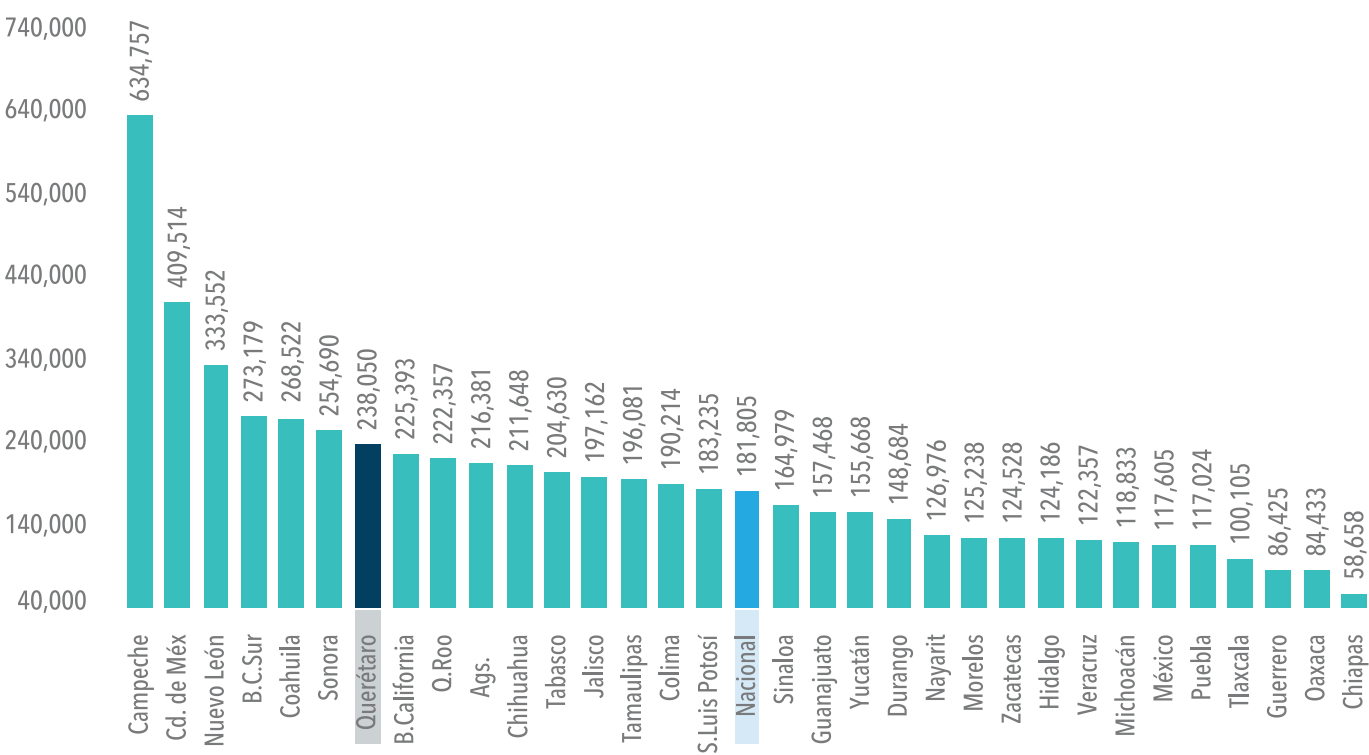
### Gross Domestic Product per Capita

The GDP per capita is a macroeconomic indicator of productivity and economic development used to provide an overview of the performance and the socio-economic conditions of a region. It takes into account both real growth and the workforce.

This indicator shows the relationship between the income of a country or an entity, and the number of inhabitants in the corresponding demarcation. It is an indicator used to estimate the economic affluence of an entity and it is directly linked to the quality of life of its citizens.

In the year 2019, the GDP per capita in Querétaro reached a total of 238,050 pesos. This figure, compared to the 181,805 pesos of the national GDP per capita, outperformed the country's average by 30.9%. The entity remains among the top positions despite the fact that it doesn't have any oil-related activity like other states such as Campeche or Nuevo León do, just to name a few.

GDP per capita by state, 2019.  
(current pesos)



Source: Ministry of Sustainable Development, with information from the National Statistics and Geography Institute and the National Population Council, , 2021.





Economically Active Population (PEA) and Non-economically Active Population (PNEA)

The Economically Active Population, or PEA for its Spanish acronym, of the entity is comprised by inhabitants of working age who currently hold a job or are looking for one. The fraction of the PEA that is searching for employment represents the unemployment rate.

On the other hand, the Non-economically Active Population, or PNEA for its Spanish abbreviation, refers to individuals aged 15 years and older who are neither employed nor searching for employment. Within the PNEA the individuals are divided into not available and available, the latter referring to individuals who are not actively searching for employment but would be interested in one if they were offered an opportunity.

According to the National Survey of Occupation and Employment (ENOE for its Spanish abbreviation) conducted by the INEGI, during the 4th quarter

of 2020 the state of Querétaro had a PEA that amounted to 949,571 individuals; in other words, 61,455 (6.9%) more than that same period in 2019. From that figure, 39.2% of them were women and 60.8% were men, and only 7.0% were unemployed.

The PNEA amounts to 725,316 individuals, and it is important to point out that 83.2% is integrated by the population that is not available and 16.8% are individuals who would take the opportunity of an employment (PNEA that is available). For the year 2020, the percentage of the latter duplicated compared to the year 2019.

The sum of the PEA and the PNEA gives a total of 1,674,887 individuals, a number that represents the working-age population where the PEA stands out with 44% of the total population of the state.

The following table contains information regarding the PEA and the PNEA:

Economically Active Population (PEA) and Non-economically Active Population (PNEA) of Querétaro for the IV quarter of 2019 and 2020.						
Indicator	2019			2020		
	Total	Men	Women	Total	Men	Women
1. Total population	2,130,558	1,016,881	1,113,677	2,158,098	1,034,515	1,123,583
2. Population aged 15 years and older	1,616,595	765,082	851,513	1,674,887	785,604	889,283
Economically Active Population (PEA)	888,116	547,679	340,437	949,571	577,429	372,142
Employed	845,960	516,082	329,878	883,081	531,617	351,464
Unemployed	42,156	31,597	10,559	66,490	45,812	20,678
Non-economically Active Population (PNEA)	728,479	217,403	511,076	725,316	208,175	517,141
Available	59,374	22,083	37,291	121,930	58,056	63,874
Not available	669,105	195,320	473,785	603,386	150,119	453,267

Source: National Survey of Occupation and Employment (ENOE), INEGI 2021.





The distribution of the PEA that is employed, according to the sector of activity in which it worked, was registered as follows:

Employed population according to the sector of economic activity, 2018 - 2020.							
Sector	2018	2019	2020	Absolute variation compared to 2019		Percentage participation 2020	
Primary	36,229	38,374	42,278	3,904	4.8	4.8%	0.2%
Extractive and electric power industries	4,702	7,318	4,336	-2,982	0.5	0.5%	
Manufacturing industry	190,932	194,846	200,692	5,846	22.7	22.7%	
Construction	85,377	84,519	104,532	20,013	11.8	11.8%	
Commerce	133,767	151,494	144,270	-7,224	16.3	16.3%	
Restaurants and accommodation services	56,088	67,473	61,612	-5,861	7.0	7.0%	
Transportation, communications, mail and storage	44,080	47,626	44,112	-3,514	5.0	5.0%	
Professional, financial and corporate services	88,196	79,195	80,878	1,683	9.2	9.2%	
Social services	72,120	61,468	76,187	14,719	8.6	8.6%	
Various services	87,634	87,764	88,726	962	10.0	10.0%	
Government and international organizations	28,694	25,220	34,062	8,842	3.9	3.9%	
Not specified		663	1,396	733	0.2		
Total	829,255	845,960	883,081	37,121	100.0		

Source: National Survey of Occupation and Employment (ENOE), INEGI 2021.  
Note: The values correspond to the fourth quarter of the years 2018, 2019 and 2020.



Empleo por sector de la actividad económica

En Querétaro, en diciembre de 2020, el Instituto Mexicano del Seguro Social tenía asegurados a 595,496 trabajadores. No obstante, al cierre de noviembre se habían recuperado 22,663 empleos, con un porcentaje del 65.4% respecto a aquellos suspendidos por la pandemia provocada por la COVID -19.

La participación por sector económico fue la siguiente: 3.6% en el primario, 45.4% en el secundario y 51.0% en el terciario. Las industrias de la transformación y de servicios para empresas, personas y el hogar son las que brindaron el mayor número de plazas a trabajadores asegurados y, en menor grado, las industrias extractivas y la eléctrica.

Cada sector, de acuerdo a su fortaleza, resulta vital para el dinamismo económico de Querétaro: el primario por la importancia de sus actividades, el secundario por su estructura productiva, y el terciario por su porcentaje de participación.



Participación por sector económico

Número de trabajadores asegurados por actividad económica en el estado de Querétaro, 2018-2020.

Sector	Actividad	Dic. 2018	Dic. 2019	Dic. 2020	Variación anual		Participación porcentual 2020
					Absoluto	Relativo	
Primario	Agricultura, ganadería, silvicultura, pesca y caza	18,560	21,255	21,465	210	1.0	20.0%
	Industrias de la transformación	207,319	220,558	217,389	-3,169	-1.4	0.3% 3.6%
Secundario	Construcción	54,094	53,623	47,945	-5,678	-10.6	5.5%
	Industria eléctrica	3,313	3,342	3,336	-6	-0.2	8.1% 0.6%
	Industrias extractivas	1,976	1,683	1,611	-72	-4.3	16.5%
Terciario	Servicios para empresas, personas y el hogar	122,927	127,732	119,121	-8,611	-6.7	36.5%
	Comercio	88,740	94,801	98,035	3,234	3.4	
	Servicios sociales y comunales	51,037	52,936	53,967	1,031	1.9	
	Transporte y comunicaciones	28,892	31,989	32,627	638	2.0	
Total		576,858	607,919	595,496	-12,423	-2.0	9.1%

Fuente: Secretaría de Desarrollo Sustentable del Estado con datos abiertos del IMSS (<http://datos.imss.gob.mx/dataset/asg-2020>), 2021.

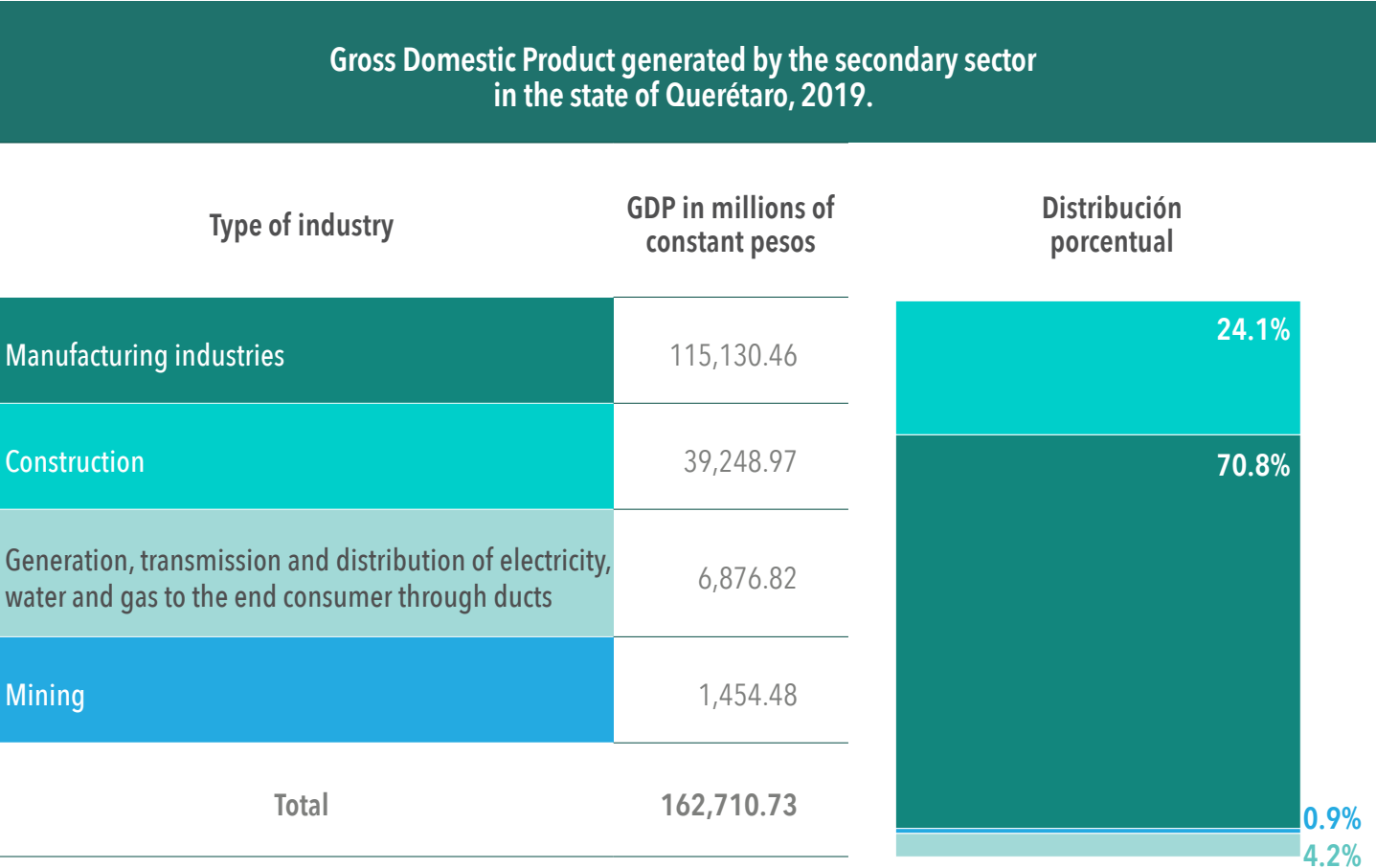


# 5.2. Industrial sector

The industry had a variation of -0.6% compared to 2015, a figure that contrasts with the national variation of -11% that was reported according to information from the ITAEE of the National Statistics and Geography Institute.

## 5.2.1. Productive structure of the industry

In 2019, Querétaro generated a total Gross Domestic Product of 403,905.22 million constant pesos out of which the secondary sector contributed approximately 42.8% with the following sums per economic sector.



Source: Ministry of Sustainable Development, with information from the National Statistics and Geography Institute, 2021.

Within the secondary sector, manufacturing industries play an important role in the state, contributing with a share of 70.8% to the GDP.

## 5.2.2. Foreign Direct Investment (FDI)

The FDI in the entity’s secondary sector amounted to 113.6 million dollars, a sum that represented 46.5% of the total reported in 2020. The manufacturing industry had the biggest share with 134.5 million dollars.

The following table shows the distribution according to the type of industry:

Foreign Direct Investment in the secondary sector of the state of Querétaro, 2020.

Type of industry	Millions of dollars
Manufacturing industries	134.5
Construction	-30.4
Generation, transmission and distribution of electric power, water and gas through ducts	11.0
Mining	-1.5
Total	113.6

Source: Ministry of Economy. General Directorate of Foreign Investment, 2021.





### 5.2.3. Manufacturing industry

The secondary sector transforms goods and products that come from the primary sector, or sometimes even from the secondary sector itself, into new or different products.

The main purpose of the manufacturing industry, which is a fundamental part of this sector, is to manufacture finished products for their distribution and consumption.

According to information from the INEGI, the value of the manufacturing industry’s output in Querétaro increased by 2.4% in 2019.

#### Employment in the manufacturing industry

According to information from the IMSS, insured workers in the manufacturing or transformation industry were distributed as follows:



Insured workers in the state of Querétaro by type of industry as of December.				
Industry <sup>1</sup>	2019	2020	Annual variation (%)	Percentage participation 2020
Food industry	20,102	18,614	-7.4	8.6
Beverage and tobacco industry	4,049	3,924	-3.1	1.8
Manufacturing of garments	6,665	6,207	-6.9	2.9
Textile industry	3,639	3,297	-9.4	1.5
Paper industry	5,705	5,700	-0.1	2.6
Printing and related industries	4,877	4,702	-3.6	2.2
Chemical industry	10,346	10,832	4.7	5.0
Plastics and rubber industry	27,773	26,433	-4.8	12.2
Manufacturing of non-metallic mineral products	5,044	5,014	-0.6	2.3
Manufacturing of metallic products	25,498	23,410	-8.2	10.8
Manufacturing of machinery and equipment	6,492	6,440	-0.8	3.0
Basic metal industries	4,372	4,463	2.1	2.1
Manufacturing and assembly of machinery, equipment, appliances, accessories and electrical, electronic items and their parts	29,231	33,904	16.0	15.6
Manufacturing of transportation equipment	55,216	53,062	-3.9	24.4
Other subsectors	11,549	11,387	-1.4	5.2
Total	220,558	217,389	-1.4	100.0

Source: Ministry of Sustainable Development of the State with public information from the IMSS (<http://datos.imss.gob.mx/dataset/asg-2019> y <http://datos.imss.gob.mx/dataset/asg-2020>), 2021.  
<sup>1</sup>Note: the IMSS has a different classification which is why the classification closer to SCIAN was chosen.



### Output value by type of industry

During 2020, the industries that presented a larger percentage participation in manufacturing outputs were the ones related with: transportation equipment, 23.3%; accessories, electric appliances and electric power generation equipment, 14.5%; food industry, 14.1%; and chemical industry, 11.5%.

It is worth mentioning that there was a variation of -14.5% in the manufacturing industry during the first half of the year; however, it recovered for aggregated value of 2020 since the overall variation was reduced to -2.7%.



Manufacturing production of the state of Querétaro by type of industry, 2020.

Type of industry	Production value (thousands of current pesos)	Annual variation (%)	Percentage participation
Food industry	47,583.0	7.6	14.1
Beverage and tobacco industry	15,181.0	-5.0	4.5
Manufacturing of textile products, except garments	527.0	-19.4	0.2
Manufacturing of garments	1,251.0	-16.1	0.4
Wood industry	620.0	-16.4	0.2
Paper industry	26,747.0	5.1	7.9
Printing and related industries	3,156.0	-7.2	0.9
Chemical industry	38,736.0	-0.6	11.5
Plastics and rubber industry	27,775.0	-2.3	8.2
Manufacturing of non-metallic mineral products	7,822.0	-6.3	2.3
Basic metal industries	1,807.0	-28.3	0.5
Manufacturing of metallic products	12,774.0	-5.9	3.8
Manufacturing of machinery and equipment	11,242.0	-25.2	3.3
Manufacturing of computer, communication, measurement and other equipment, components and electronic accessories	10,176.0	-13.2	3.0
Manufacturing of accessories, electric appliances and electric power generation equipment	48,717.0	6.5	14.5
Manufacturing of transportation equipment	78,404.0	-7.2	23.3
Other subsectors	4,420.0	-20.9	1.3
<b>Total</b>	<b>337,002.0</b>	<b>-2.7</b>	<b>100.0</b>

Source: Ministry of Sustainable Development, with information from the National Statistics and Geography Institute. Monthly Survey of Manufacturing Industry (EMIM),2021.



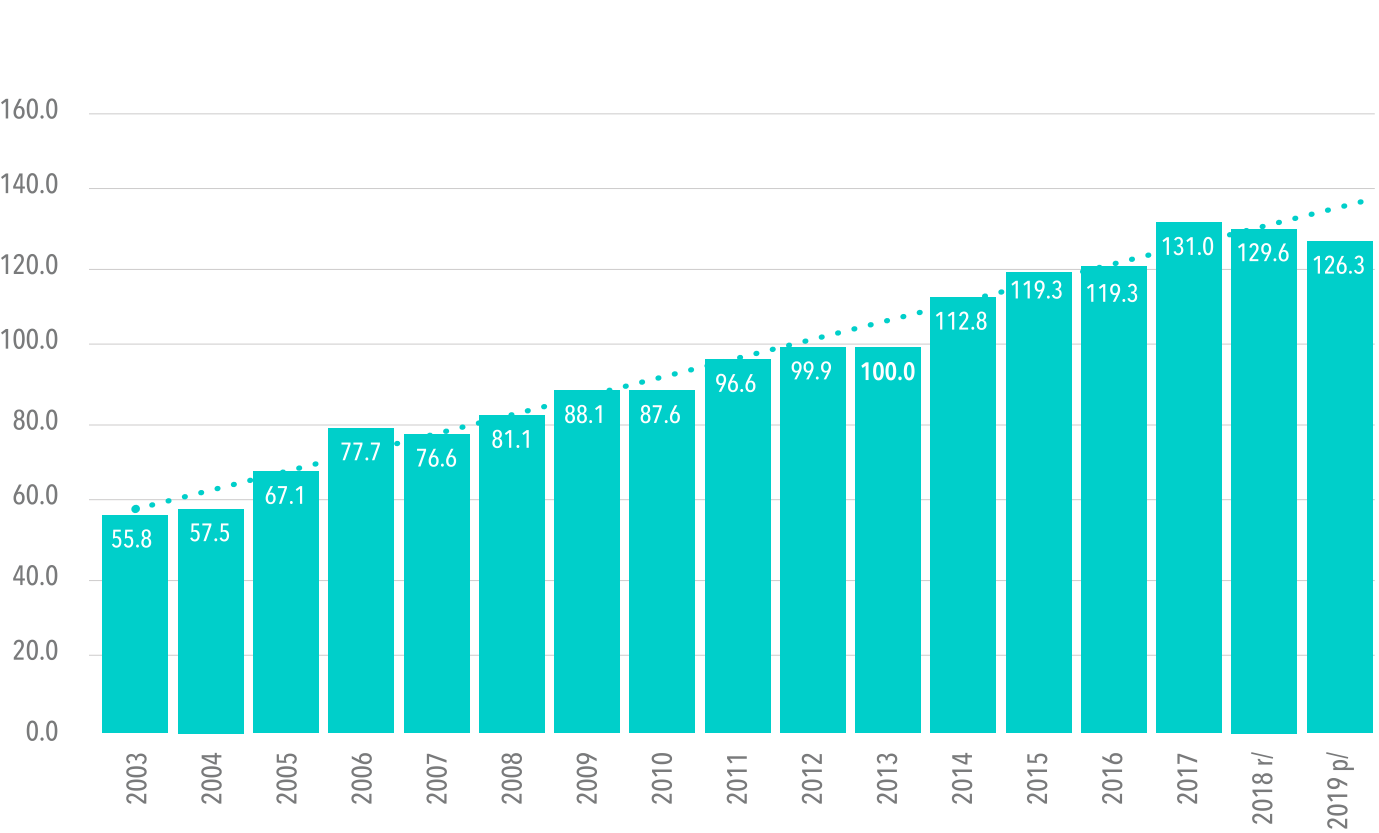
## 5.2.4. Construction industry

Construction is another key player in the secondary sector. It is fundamental for the entity’s development, and it provides public and domestic infrastructure that contributes to the wellbeing of society. This industry is the reason why there are roads, bridges, roadways, buildings and recreational or health spaces, among many others.

Given its usage of raw materials and products generated by other industrial sectors, construction is one the main drivers of both the state and country economies. Its activity and development benefits other segments of the production chain.

From 2015 to 2019, this industry’s GDP grew 37% and its physical volume index increased 26.3% compared to the base year, 2013. This indicator shows a positive trend since 2003. On the other hand, the average ITAEE for 2020 shows that Querétaro ranked second on a national level.

GDP Index for the construction sector in Querétaro , 2003 - 2019.

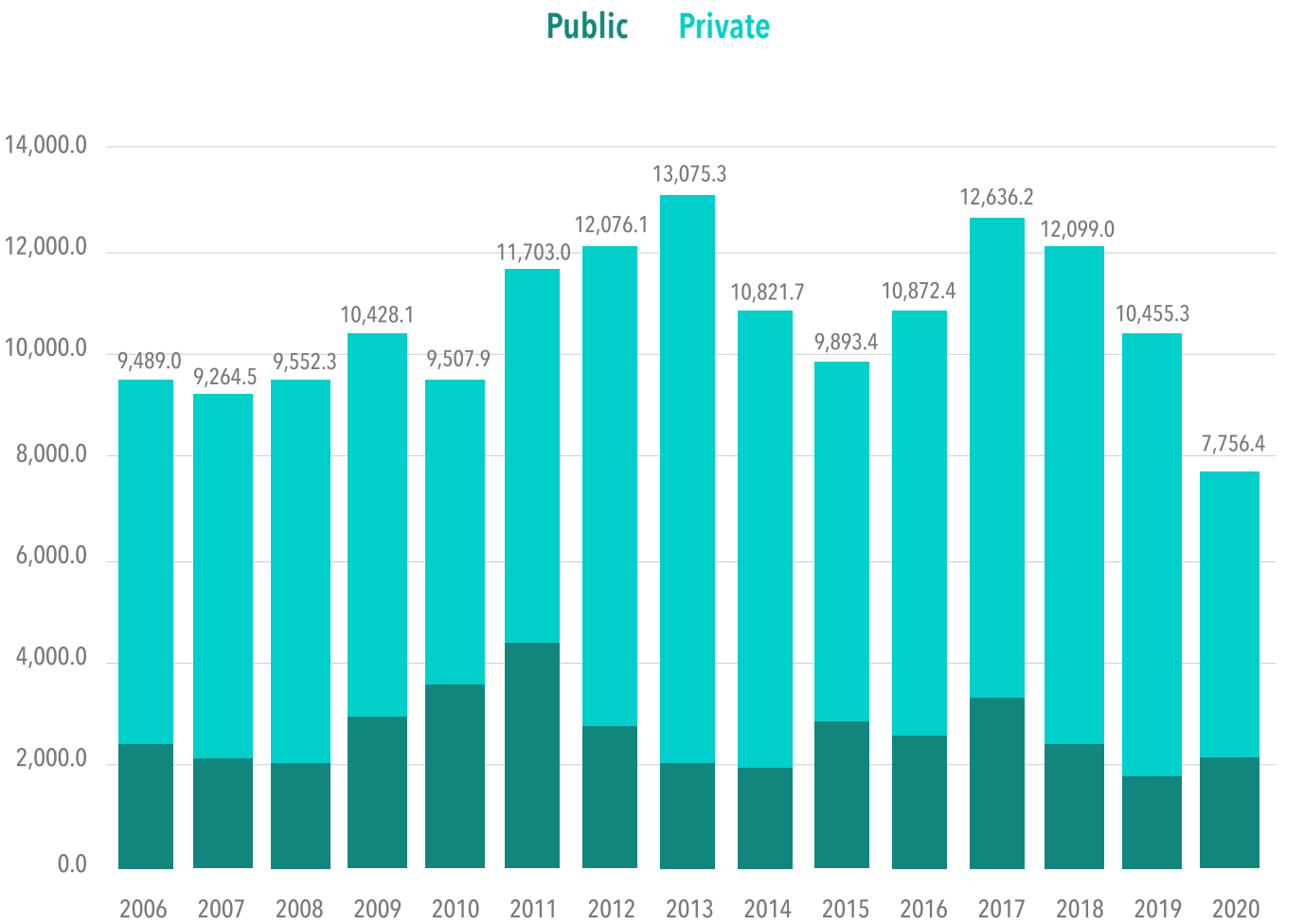


Source: National Statistics and Geography Institute (INEGI), 2021.  
Note: Preliminary figures (p/) from 2019 and forward and reviewed figures (r/) from 2018 and backward.  
Base index 2013=100

Private enterprises generate the highest production value each year in the construction sector; on average the private sector’s contribution is 75% and the public sector’s is 25%.

By the end of 2020, the construction industry reported 47,945 insured workers, a figure that represented 8.0% of the entity’s total amount.

Production value generated in the entity by sector, 2006 - 2020 (millions of constant pesos).



Source: National Statistics and Geography Institute (INEGI). National Survey of Construction Companies, 2021.





### Output value per sector

According to information obtained from the Monthly Survey of Construction Companies of the INEGI, the output value generated in the entity during 2020 amounted to 7,756.3 million constant pesos. From that sum, 74.5% was generated by companies established in the entity, and it represented 5,775.2 million real pesos.

Out of the total value of constructions, 63.3% was built by the entity’s companies. This percentage represents 2,644.5 million constant pesos.

The following table shows the sums produced by type of construction:

Production value of the construction industry in the state of Querétaro, 2012 to 2020. (thousands of constant pesos)								Percentage distribution 2020	
Year	Building	Water, irrigation and sanitation	Electricity and telecommunications	Transport and urbanization	Oil and petrochemical	Other constructions	Total		
2012	7,509,444.7	299,643.4	285,902.6	2,574,060.2	0.0	1,407,085.0	12,076,135.9	54.02%	
2013	6,381,903.8	205,456.1	1,867,522.4	2,094,860.1	0.0	2,525,600.0	13,075,342.5		
2014	5,811,765.1	273,471.9	256,913.9	2,656,566.7	20,085.0	1,802,923.8	10,821,726.4		
2015	5,499,737.8	249,910.5	262,522.8	2,671,149.4	0.0	1,210,072.7	9,893,393.3		
2016	5,947,848.6	639,271.6	414,060.2	2,775,035.3	817.2	1,095,330.0	10,872,362.8		
2017	6,978,647.2	464,370.9	320,495.3	3,329,421.2	0.0	1,543,252.7	12,636,187.3	4.77%	3.39%
2018	7,584,825.1	166,766.4	289,149.1	2,592,120.6	0.0	1,466,124.9	12,098,986.0	24.72%	
2019	5,808,355.3	380,799.1	746,976.8	2,245,340.9	0.0	1,273,793.1	10,455,265.1		
2020	4,190,010.4	370,509.5	262,470.7	1,917,668.7	0.0	1,015,691.3	7,756,350.7	13.102%	

Source: Ministry of Sustainable Development, with information from the National Statistics and Geography Institute, 2021.



# 5.3. No touching business meeting

Through the No Touching Platform, the Government of the State of Querétaro, through the Ministry of Sustainable Development in coordination with the Center for Competitiveness of Mexico (CCMX for its Spanish abbreviation), CANACO Querétaro and the Chain of Suppliers of the Mexican Industry (CAPIM for its Spanish abbreviation), organized a Business Meeting that will allow participating companies to connect with national and state buyers, discover new suppliers and schedule virtual business appointments.

In the first meeting that took place from July 20 to August 14, 2020, 6 buyers participated, 108 suppliers registered and 57 were linked, with a market value of 25 million pesos.

For the second meeting from October 26 to November 6, 2020, 6 buyers participated, 37 suppliers registered and 16 were linked, generating an economic impact of 10 million pesos.





# 5.4. Triple Helix

According to what is provided in the 2016-2021 State Development Plan, strategy I.2 «Strengthening of the access and quality of educational services in the State», specifically in the line of action «to foster the connection between educational institutions and the productive sector», the current administration has worked intensely to consolidate the Triple Helix model. This model focuses on creating a link between educational institutions, government authorities, and Querétaro’s industry.

Through the so-called clusters and chamber organizations (a cluster is a group of interrelated companies from the same sector), the State Government has been able to detect the industry’s specific needs. At the same time, academic institutions have developed the human capital that the market requires. As a result of the coordinated efforts between these three sectors, the industry has made great progress.

## 5.4.1. Higher Education

This type of education is taught in universities, technological institutes and teacher training institutions. Its structure has four levels of schooling: the undergraduate bachelor degree, and three postgraduate studies which are: specialization, master, and doctorate.

During the 2020-2021 school year, the registered enrolment in institutions offering undergraduate programs was of 84,379 students in 771 programs, and 9,040 teachers. The number of students enrolled in superior university technician (TSU for its Spanish acronym) programs is 6,723. Additionally, there are 5,838 students from various postgraduate courses, adding up to a total of 96,940 students of higher education.

Out of the total number of students studying bachelor degrees, 71% study in universities, 15.5% in technological institutes, and 2.4% in teacher training institutions; altogether, they make up 88.9% of the enrollment in formal educational institutions. The remaining 11.1% corresponds to universities offering non-school based education.

Students enrolled in Superior University Technician (TSU) programs are distributed among the following institutions: Universidad Tecnológica de Querétaro (UTEQ, Technological University of Querétaro), 56.5%; Universidad Tecnológica de San Juan del Río (UTSJR, Technological University of San Juan del Río), 25%; Universidad Aeronáutica en Querétaro (UNAQ, Aeronautical University in Querétaro), 6.3%; Universidad Tecnológica de Corregidora (UTC, Technological University of Corregidora), 4.7%; and the remaining 7.5% is distributed between the Universidad Autónoma de Querétaro (UAQ, Autonomous University of Querétaro), the Unidad Académica de Jalpan (UTSJR-Jalpan de Serra, Academic Unit of Jalpan de Serra) and others.

Enrollment in institutions offering undergraduate programs. School year 2020/2021.			
Institutions	Students	Teachers	Programs
Universities	59,939	6,812	521
Technological institutes	13,046	944	47
Teacher training institutes	2,038	262	56
Non-school based education institutes	9,356	1,022	147
Total	84,379	9,040	771

Source: F911 system for the national educational statistical integration of the Ministry of Public Education (SEP for its Spanish abbreviation). Ministry of Education of the State Government. Basic Education Services Unit in the State of Querétaro. Subcoordination of Administrative Management. Direction of Educational Planning. Statistics Department.

Enrollment and programs for superior university technicians. School year 2020/2021.								
Institution	UTEQ	UTSJR	UNAQ	UTC	UTSJR Jalpan de Serra	UAQ Querétaro	Others <sup>1</sup>	Total
Total	3,797	1,684	426	313	146	71	286	6,723

7.5%

4.7%

6.3%

25.0%

56.5%

Source: F911 system for the national educational statistical integration of the Ministry of Public Education (SEP for its Spanish abbreviation). Ministry of Education of the State Government. Basic Education Services Unit in the State of Querétaro. Subcoordination of Administrative Management. Direction of Educational Planning. Statistics Department.

<sup>1</sup> Others: Academia de Estudios Superiores Constantino (Constantino Higher Education Academy)/ Atenas, Estudios Superiores (Atenas, Higher Education) / Instituto del Servicio Profesional de Carrera (Professional Career Service Institute) / Universidad del Valle de México / Centro Universitario CEICKOR (CEICKOR University Center) / Music City College / Universidad Cuauhtémoc, A. C. / Escuela de Podología Nuevo Siglo (Nuevo Siglo Pedicure School) / Instituto de Rehabilitación de Querétaro (Rehabilitation Institute of Querétaro) / Instituto Universitario del Río.

Out of 5,838 students in postgraduate programs, 71.2% are studying master degrees, 14.8% study specializations, and 14% study doctorate programs.

Enrollment of students in institutions offering postgraduate programs. School year 2020/2021.					
Institution	Specialization	Master	Doctorate	Total	Percentage distribution
Formal	808	3,268	740	4,816	14%
Non-school based	57	888	77	1,022	15%
Total	865	4,156	817	5,838	71%

Source: F911 system for the national educational statistical integration of the Ministry of Public Education (SEP for its Spanish abbreviation). Ministry of Education of the State Government. Basic Education Services Unit in the State of Querétaro. Subcoordination of Administrative Management. Direction of Educational Planning. Statistics Department.





#### Department of Social Sciences and Law, Administration and Business, SEDEQ

- For the 2019-2020 school year, there are 35,602 students registered in undergraduate and TSU programs, for the 2020-2021 school year there are 2,676 students in postgraduate programs.
- The number of graduates of undergraduate and TSU programs for the 2019-2020 school year is 7,023 students, which equals 43% of the total. For the 2020-2021 school year for postgraduate programs the percentage of graduates is 60%, which equals 1,444 students.
- There are 348 undergraduate and TSU programs; on the other hand, there are 121 specializations in postgraduate programs.

#### Department of engineering, manufacturing and construction, SEDEQ

- For the 2019-2020 school year there are 26,270 students enrolled in undergraduate and TSU programs; for the year 2020-2021 there are 803 students in postgraduate programs.
- The number of graduates from undergraduate and TSU programs in the 2019-2020 school year is of 5,105 students, which equals 31.2% of the total. For the 2020-2021 the percentage of graduates of postgraduate programs is of 9.2%, that is 221 students.
- For the 2019-2020 school year 802 undergraduate or TSU programs were being taught; from those, 201 belong to the department of engineering, manufacturing, construction and information and communication technologies (TIC for its Spanish abbreviation), which equals 25.1%. In postgraduate programs 46 specializations are offered.

- The study programs that stood out in the 2019-2020 school year for being the most widely offered are the following: industrial engineering or industrial processes engineering; engineering in information and communication technologies (TIC); engineering in different specializations of the aeronautical sector; mechatronic or automatization engineering; engineering in manufacturing; environmental or renewable energy engineering, and chemical engineering.

Students, graduates and programs by field of studies.						
Field of knowledge	Undergraduate and TSU programs <sup>1</sup>			Posgraduate <sup>2</sup>		
	Students	Graduates	Programs	Students	Graduates	Programs
Management and business	22,220	4,578	220	1,562	855	54
Agronomy and veterinary	944	117	7	18	13	1
Arts and humanities	4,421	577	60	220	68	17
Health sciences	8,415	1,013	48	773	206	37
Natural sciences, mathematics and statistics	2,217	379	17	416	156	15
Social sciences and law	13,382	2,445	128	1,114	589	67
Education	5,542	976	96	825	233	36
Engineering, manufacturing and construction	26,270	5,105	153	803	221	39
Services	1,849	296	25	27	22	2
Information and communication technologies	4,483	862	48	80	43	7
<b>Total</b>	<b>89,743</b>	<b>16,348</b>	<b>802</b>	<b>5,838</b>	<b>2,406</b>	<b>275</b>

**Source:** <sup>1</sup>Ministry of Education of the Executive Power of the State of Querétaro, 2020 (Educational statistics for the beginning of the school cycle 2019-2020 and the end of the cycle 2018-2019, integrated by the USEBEQ through Formats 911 and formalized by the SEP). <sup>2</sup>F911 system for the national educational statistical integration of the Ministry of Public Education (SEP for its Spanish abbreviation). Ministry of Education of the State Government. Basic Education Services Unit in the State of Querétaro. Subcoordination of Administrative Management. Direction of Educational Planning. Statistics Department.



It is 45 kilometers away from the state capital, on the state highway 200 Querétaro-Tequisquiapan, next to the International Airport of Querétaro (AIQ for its Spanish abbreviation). Its mission is to train professionals and researchers for the aeronautical sector with values, knowledge, skills and national and international recognition.

One of the strategic objectives of the UNAQ is to be an institution that is closely connected to the social and productive sectors so that they can guide, provide feedback and enrich the substantive functions of the university. That is why it collaborates extensively with enterprises and institutions, among which the following stand out: Federal Civil Aviation Agency (AFAC for its Spanish abbreviation), Mexican Space Agency (AEM for its Spanish abbreviation), Mexican Air Force (FAM for its Spanish abbreviation), Polytechnic University of Madrid (UPM for its Spanish abbreviation), Polytechnic University of Querétaro (UPQ for its Spanish abbreviation), Autonomous University of Querétaro (UAQ for its Spanish abbreviation), University of Toulouse, University of Kansas, among others.

At the end of 2020, there were 1,302 students enrolled in programs at the UNAQ and, since 2006 there have been 6,552 graduates from the Training for Work (EPT for its Spanish abbreviation) programs. In the department of continuous education, over 88,000 hours of training have been given to 20,609 students.



## Infrastructure

The UNAQ has specific infrastructure for the practical training of its students and for their use by teachers in various projects. It has workshops, laboratories, aircrafts, equipment and tools. This allows students to develop their technical skills and to obtain specialized knowledge with recognition from the Mexican and European aeronautical authorities, for the applicable programs.

Among its facilities, the following stand out:

- 18,000 m<sup>2</sup> of premises mostly for laboratories and workshops, administrative areas and an information center
- Franco-Mexican Campus with 15 laboratories, workshops, an intervention area, a documentary area and a teachers' lounge.
- Laboratory of Aeronautical Teachings-Hangar. It is integrated by an intervention area, maneuvering yard, laboratories and workshops.
- Eleven specialized workshops and laboratories.
- Laboratory of Aeronautical Competences-PLM (Product Lifecycle Management Center).
- Center for Innovation on Composite Materials Training.
- NCTech® Additive Manufacturing and Reverse Engineering Laboratory.
- Conditioned spaces for postgraduate activities.
- Three information centers.
- Areas for culture and sports.



- **Franco-Mexican Campus**

Created in 2008 from an official agreement between Mexico and France.

There were some educational missions in France carried out by experts in 2009 with the sole purpose of generating the concept on which the current Franco-Mexican Campus is based. Around the middle of the year 2010, several institutions such as the Ministry of Public Education (SEP for its Spanish abbreviation), the Ministry of National Education of France (MEF for its French abbreviation), the Ministry of Communications and Transport (SCT for its Spanish abbreviation), the General Management of the National School for Technical Professional Education (CONALEP for its Spanish acronym), and representatives from companies of the SAFRAN and Airbus Helicopters groups, signed a collaboration agreement. This model resulted in a specialized infrastructure, both in laboratories and workshops.

- **Laboratory of Aeronautical Teachings (Hangar)**

The Hangar is a space where the students can apply what they have learned in the classroom in a practical way by performing different maintenance procedures on an aircraft. With this practice they strengthen their skills and dive deeper into an aeronautical environment that is closer to real-life experience. This gives them a competitive advantage when entering the workforce.

- **Center for Innovation on Composite Materials Trainings**

It has a surface of 480 m<sup>2</sup> and a construction of 800 m<sup>2</sup> that houses 4 multi-purpose classrooms, a meeting room, offices, a warehouse for dies and equipment, a laboratory (clean room), a weaving workshop, Autoclave equipment, a cutting area for composite materials and sandblasting, and an area for teachers.

It is worth mentioning that there is a Computerized Jacquard Loom. There are only three such looms in the world: one in France, one in the United States and one in the UNAQ, a situation that places the institution at the forefront of education in the sector.

- **Virtual Tour**

The virtual tour is designed so that the user, in a dynamic way and through just a few clicks, can visit the facilities of the UNAQ which have been internationally distinguished and are used for the educational and job training programs that the institution offers to different companies.

During the tour you may view a brief description of each area, in Spanish and English. It can be visited through the website <https://unaq.edu.mx/rvirtual/unaq.html>





Educational Offer

- **Superior University Technician (TSU)**  
The TSU programs offered at the UNAQ are based on a system that is 70% practical and 30% theoretical, and they are the following:  
TSU in Aeronautical Maintenance, Glider and Engine Area.  
TSU in Aeronautical Maintenance, Avionics Area.  
TSU in Aeronautical Manufacturing, Precision Machining Area.  
  
The TSU in Maintenance programs are authorized by the Federal Civil Aviation Agency (AFAC for its Spanish abbreviation), which used to be the General Management for Civil Aeronautics (DGAC for its Spanish abbreviation), which allows students to obtain a license as Class I Maintenance Technician skilled in Engines and Gliders, or a license as Class II Maintenance Technician skilled in Electronic Systems of the Aircrafts, upon graduation.
- **Engineering**  
Aeronautical Engineering in Manufacturing (IAM for its Spanish abbreviation).  
Engineering in Aeronautical Mechanical Design (IDMA for its Spanish abbreviation).  
Electronic Engineering and Aircraft Systems Control (IECSA for its Spanish abbreviation).
- **Postgraduate program**  
Master in Aerospace Engineering (MIA for its Spanish abbreviation).  
Master of Science in Aerospace Engineering (MCIA for its Spanish abbreviation).  
Specialization in Aeronautic Appraisals (EVBA for its Spanish abbreviation).



Catering to the industry

- **Training for Work (EPT for its Spanish abbreviation)**  
It teaches and trains candidates to work in the different companies through specialized courses that are tailored to the needs of such companies. Study programs and entry profiles are aligned with the needs of the aeronautical industry, and they have a duration of 5 to 14 weeks in the following specializations:
  - Structural assemblies
  - Sheet forming
  - CNC machining
  - Assembly of electrical harnesses
  - Manufacture of composite materials
  - Treatments  
The companies with which the ETP courses interact are the following:  
  
Airbus Helicopters, Bombardier Aerospace, Safran Aircraft Engines, Safran Landing Systems, Safran Sames Rep, Safran Snecma America Engine Services, TechOps and Lauak, among others.
- **Continuous Education**  
Specific courses offered to fulfill the particular needs of each company.

Continuous education offer from the Aeronautical University in Querétaro for companies, 2020.	
Refresher, training, specialization or skill development courses:	Seminars.
R&D (Engineering, Design and Development)	Diploma Courses:
Manufacturing	Diploma of Initiation to the Aeronautical Industry.
Systems and Engines	Project Development.
Structural Repairs	Preparation for Certifications.
Avionics	Quality systems:
Appearance	Special Processes (NADCAP).
Aeronautical Fundamentals	NDT.
Professional Development	Manufacturing.
Flight Attendant Course	Welding.
Training Course for Operational Security Auditors (SMS).	Superficial/Chemical Treatments.
Training Course for Aeronautical Operations Officer	

Source: Aeronautical University of Querétaro (UNAQ).



• **Technological Development**

Its objective is to design and develop specific scientific and technological products according to the customer’s needs.

**Services:**

- Engineering and technological development projects.
- Counseling and drafting of documents for participation in Federal and State funds for the development of technology.
- Technical consultancy for solutions to industrial problems.
- Engineering and manufacturing of new products.
- Counseling on industrial property.

Their competences allow the execution of projects in some other areas such as:

- Alternative Energy Sources.
- Automotive.
- Agriculture and Livestock.
- Communications.
- Health Sector.

**Technological Allies:**

• Mexican Air Force.	• Horizontec
• Oaxaca Aerospace.	• Adman Leku
• MXSPACE	• Ingeniería Eléctrica y de Control
• TechOps	• Green and Blue
• Eurotranciatu	



• **Patent Center CEPAT**

The Patent Center (CEPAT for its Spanish acronym) of the UNAQ aims to promote the registration of trademarks and patents in all sectors but with a main focus on the aeronautical sector, as well as to have an impact at an institutional, social and national level by promoting the culture of protection of technological development through patents, utility models and industrial designs generated by Mexican talent.

The CEPAT offers the following services:

- Drafting of applications for patents.
- Trademark registry.
- Commercial slogan registry.
- Consulting in copyright processes.
- Industrial property protection.
- Generation of portfolios for the commercialization of acquired rights.
- Background check of distinctive signs.
- Training.

• **Some institutional strategies COVID-19**

- For TSU and Engineering: virtual admission processes, online introductory course, online degree.
- For postgraduate courses: modification of didactic materials, adjustments to the evaluation mechanisms, scheduling of consulting sessions.
- Synchronous and asynchronous classes, use of tools such as: office365, Teams, Forms, Planner, Webex.
- To resume activities in workshops, laboratories and warehouses: use of protective equipment and masks, disinfection of tools, placement of acrylic between user-staff, scheduling of mixed classes (40% in the classroom, 60% online), with a duration of 45 minutes (with 15 minutes of ventilation between classes) and a maximum occupancy of 15 students plus 1 teacher in the different spaces.



## Technological University of Querétaro (UTEQ)

During 2019, the UTEQ maintained its strategy of strengthening and modernizing the key sectors in Querétaro through new-era techniques. This led to the implementation and continuation of the following projects and programs, working in strategic alliances with various leading companies in the field:

### • UTEQ-SIEMENS Training Center (Ingenuity Lab)

This partnership's goal is to train individuals who are specialized in industrial software for product life management, or PLM, through a technological co-investment collaboration between the UTEQ and the company SIEMENS PLM.

The platforms NX, Teamcenter, Tecnomatix, Solidedge and Nastran are available at this center and they have been used to train 81 individuals, both company employees and UTEQ teachers.

In 2020, a support agreement was made with Siemens to train and certify teachers and students under the company's industrial software platforms. To continue with this strategy, a private UTEQ cloud has been created which expands the capacity of remote training, using light equipment that is accessible in regular university laboratories and also for personal use.

There is a hardware-for-industry 4.0 Showroom that provides training for students in subjects like automatization, software applied to PLC (Programmable Logic Controller) for energy efficiency, factory simulation, industrial communication and digital control systems. There is an ongoing collaboration with the company's managers so this space can be offered as a training and certification center in industrial hardware.

### • Creativity and Innovation Center 4.0 (CIC 4.0)

The Creativity and Innovation Center 4.0 (CIC 4.0) was created as the platform that drives the participation of the UTEQ in Industry 4.0 in response to the major changes in context, validity and relevance of the educational offer. Its objective is to enhance the capacity of the UTEQ's Innovation Ecosystem through the integration of trained human capital and students in a space of multidisciplinary, transdisciplinary and organizational convergence that integrates programs with other organizations, advanced technologies and creates connections with the productive, private and social sectors.

It is a center of smart solutions for the region's productive sector, specifically aimed at small and medium enterprises, as well as technology-based entrepreneurs. Through the identification of needs, support and connection with companies who are leaders in technology, it contributes towards the strengthening of capabilities, growth, competitiveness and development of innovation of the local and regional manufacturing industry.

With this strategy, the CIC 4.0 is integrated as a HUB-type triple helix center, in which organizations participate in a collaborative way: public and private research and technological development centers, public and private universities, enterprise clusters, chambers and non-governmental organizations.

### • Center for Productivity and Innovation for Industry 4.0 (CEPRODI 4.0 for its Spanish acronym)

The integration and implementation of CEPRODI 4.0 seeks to accelerate the adoption of advanced intelligent manufacturing technologies and Industry 4.0 characteristics in Mexican companies, especially in small and medium enterprises (SMEs), to enhance their development and competitiveness.

CEPRODI 4.0 is an organization that seeks to promote engineering and manufacturing through training and optimization of processes, use and technological development by providing access to additive manufacturing infrastructure, as well as high-performance computing resources, and modeling and simulation tools.

The center offers education and training in subjects such as innovation, technological development, simulation, reverse engineering, outreach activities in Industry 4.0 and services in accelerated prototyping, 3D scanning, additive (3D printing) and extractive (CNC) manufacturing, Industry 4.0 demonstration projects in smart manufacturing, Smart KPIs, predictive maintenance, Big Data and Analytics for manufacturing.

### • Language Center

The UTEQ has been offering foreign language courses to society for 22 years. The languages it currently offers are English, French and German, taught through a system that develops four fundamental skills: reading, writing, conversation and oral comprehension. During the period reported, there were 1,400 students attending the external language courses quarterly.

### • Cisco Regional Academy (CA)

The UTEQ has been actively participating in the Cisco Networking Academy program for 19 years as the academy in charge of teaching the Cisco Network Associate (CCNA) curricula to students (Discovery, Exploration, Routing & Switching), and since 2012 it serves as a Support Center (ASC) and Instructor Training Center (ITC), therefore being a CISCO Regional Academy.

The Technological University of Querétaro has a special internship program to prepare those students interested in obtaining the Network Associate Certification endorsed by Cisco (CCNA). For this purpose, it has two teachers who are certified as instructor trainers and that are able to provide preparation to teachers from other academies that need instruction in order to teach this subject to their students.

The UTEQ currently provides the ASC and ITC services to different universities in the state and the region.

### • Embedded Systems Laboratory

The UTEQ, along with the companies Mabe, CIDEA, Aptiv and General Electric and the Ministry of Sustainable Development (SEDESU for its Spanish acronym), implemented the Embedded Systems Innovation and Development Center with the objective of training experts in embedded software development for the automotive, electrical appliance and aeronautical sectors. As an initial stage, a diploma course was created to train personnel from the companies involved; micro, small and medium enterprises; and university teachers. The total human capital trained in 2019 was of 90 specialists distributed in three groups of 30 participants each.





## Polytechnic University of Querétaro (UPQ)

It was founded on October 25th, 2005, with only three educational programs: Engineering in Computer Systems, Advanced Manufacturing Processes and Mechatronics. In subsequent years the following programs were offered: Bachelor in International Business (2008); Engineering in Telematics (2009); Bachelor in Small and Medium Enterprise Administration and Management (2010); and Engineering in Automotive Technology (2016). In January 2020, the first generation was enrolled in the UPQ's Master in Engineering in Productive Systems and Industry 4.0 and a Master in Administrative Engineering Program will begin in 2021.

In March 20th, 2018, the institution became the first Automotive University in Mexico recognized by the General Coordination of Technological and Polytechnic Universities with the inauguration of its facilities for the Automotive Innovation and Development Center. This space houses equipment from companies such as Brose and Mitsubishi that carry out product innovation processes and implementation of processes and production lines, thus creating the school-industry link proposed in the triple helix.

The automotive field has reoriented the educational offer towards the most dynamic sector of the local economy, and the most predominant in the state as well, allowing students to venture into training under the German dual model. This field also permeates into research with the project in which the main factors, as well as the time of affectation to which the plastic components and the automotive aesthetic paint coating are exposed, are determined by means of techniques of analysis of their physical, molecular and chemical features.

The UPQ is one of 35 institutions (public and private), and one of the three institutions of the subsystem of Polytechnic Universities of the country with 100% of the registered evaluable enrollment in programs that have a quality recognition. This is a great achievement that reflects the sustained effort of the past five years and consolidates it as an outstanding institution.

Since 2018 the Institution has become the third with the largest demand and enrollment in the state of Querétaro. The enrollment shows a growth rate of 40% from 2015 to 2020, and until 2019 it ranked seventh place among the higher education institutions (both public and private) with the largest number of students.

In September 2020 it attained an enrollment of 3,960 students and since 2009 there have been 3,770 graduates from the engineering and bachelor programs.

It currently has 7 buildings, 3 of them dedicated to classroom teaching with a total of 49 classrooms for 1,557 students, 12 computer labs with a capacity to serve 289 students simultaneously, a library, cafeteria and two areas for labs and workshops specialized in:

- Electronics
- Hydraulics
- Pneumatics
- Measurement and design
- Chemistry
- Automotive premises (CIDEA)

After an arduous management effort, the investment for the construction of building III for laboratories and workshops has finally come to fruition, with facilities that will include premises for a specialized industrial laboratory, office space and 14 new teaching classrooms, which will increase the university's enrollment by 20%.

The university also has a 3D room, auditorium rooms, isooptical rooms, a videoconference room, and spaces for sports and cultural training for the integral development of students.

### Automotive premises (CIDEA for its Spanish acronym)

This laboratory was created to develop students with the competencies needed for the design, development and implementation of products in the automotive sector. It has traditional milling machines; braking system simulators and a multipoint injection system for a fuel engine and air conditioning; study modules for automobile positioning, for automotive multiplexing system and for steering wheel angle; as well as simulators for automotive lighting systems and secondary injection of a fuel engine.

### Self-Learning Language Center (CAAL for its Spanish abbreviation)

The department of Foreign Language has designed several strategies to ensure the students' competency in the English language, and they are carried out in the CAAL. This learning space has 6 areas that provide support to the development of the four fundamental skills.

### Industry 4.0 Certifications

The UPQ entered into a partnership with the company NCTech in which, through the XpertCAD platform, students from the Industrial Engineering Programs Division have the possibility to access 16 certifications in Industry 4.0.

### Certification in the NMX-R-025-SCFI-2015 for Equal Employment and Non-Discrimination

In December 2019 the UPQ obtained the certification in the Mexican Standard NMX-R-025-SCFI-2015 for Equal Employment and Non-Discrimination, satisfactorily meeting 92 out of its 100 criteria. Additionally, due to the high level of compliance with various aspects, the institution received the "bronze" level within the compliance scale of the aforementioned standard.

In addition, in 2019 the Polytechnic University's lactation center was inaugurated as part of the verification actions, a space appointed for working mothers and students to express breast milk and store it in a safe space so that they can take it home at the end of their shift.





It is a public institution of higher education established as a decentralized public entity that started operations on September 5th, 2011. It is an academic unit that is part of the national polytechnic university network, and the second one created in the state of Querétaro.

Since the month of September 2013, it is gradually turning into the first university in Querétaro, and the second one in the country, to adopt the BIS (for its Spanish abbreviation meaning Bilingual, International and Sustainable) educational model, which develops competent professionals through relevant educational programs. In 2014 it adopted an inclusion-oriented educational model which has allowed it to serve 31 handicapped individuals to the present day.

The UPSJR has 122 signed agreements with national organizations among which the agreements for field projects, internships and social service stood out in 2019.

International mobility agreements were also signed as part of the BIS educational model.

### Infrastructure

The facilities of the UPSJR's Campus are spread throughout 207,948.37 m<sup>2</sup> and they have an infrastructure that is oriented towards the development of citizens and professionals, highlighting:

- Two buildings for classroom teaching that have classrooms, laboratories, rooms and cubicles for academic personnel, as well as other work spaces.
- Learning Center Building (Library). It is made up by classrooms, laboratories (Internet of Things, Audio and Cinema, Computers), reading and consultation area, facilities and cubicles for teachers and administrative personnel. It also has a space called Coworking for collaborative work.
- MetraCenter Building. It was inaugurated in February 2020 and has premises for the Engineering in Automotive Systems program, a room (Innovation Room) and three cubicles for administrative personnel, in addition to 10 specialized laboratories:

- Dimensional Laboratory
- Electrical Metrology Laboratory
- Computer aided design laboratory
- Prototype Laboratory
- Optics Laboratory
- Thermometry Laboratory
- Mixed Reality and Motion Capture Laboratory
- Propulsion Systems Laboratory
- Manufacture Laboratory
- Mechanical Metrology Laboratory

### Educational offer (engineering and bachelor's degree)

- Engineering in Automotive Systems (ISA for its Spanish abbreviation).
- Software Engineering (ISW for its Spanish abbreviation).
- Bachelor in Physical Therapy (LTF for its Spanish abbreviation).

All three programs were created in 2011, the same year as when the UPSRJ started its operations. The next year the program of Engineering in Industrial Metrology (IMI for its Spanish abbreviation) was initiated. In 2014 the program of Engineering in Animation and Visual Effects (IAEV for its Spanish abbreviation) was inaugurated.

### Postgraduate

The Master in Science Teaching (MEC for its Spanish abbreviation) program was started in 2020 and it currently has 10 pre-enrolled individuals.

### Continuous education

There are English courses taught on Saturdays by university teachers and offered to the community as part of the BIS educational model and, additionally, there are periodic classes taught by foreign teachers. The knowledge levels of the language are aligned to the Common European Framework of Reference.

There are also diploma courses, courses and workshops available according to the specific requirements and needs of the industry, the productive sector and the graduating students.



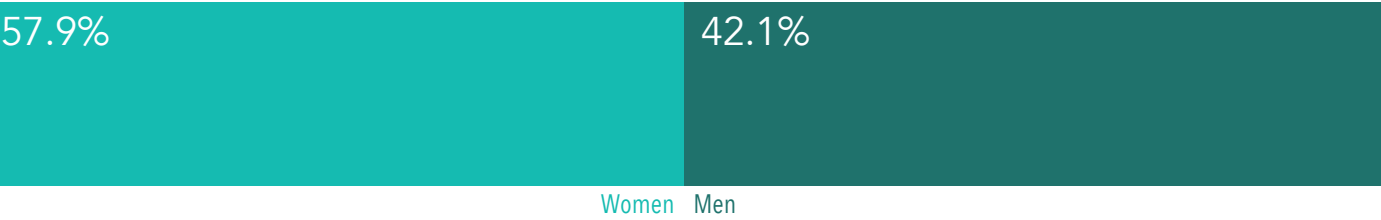
5.4.2. Occupational training

At the end of the 2019-2020 school year there were 88 registered occupational training centers distributed in 10 of the 18 municipalities of the entity. The municipality of Querétaro has 76.1% of them; San Juan del Río 11.4%; Corregidora 3.4%; and the remaining 9.1% are distributed among the municipalities of Amealco de Bonfil, Cadereyta de Montes, El Marqués, Ezequiel Montes, Jalpan de Serra, San Joaquín and Tequisquiapan.

There were 33,578 people enrolled in these centers from which 57.9% were women and 42.1% men.



33,578 People enrolled



Enrollment in occupational training centers. End of the 2019-2020 school year.				
Municipality	Total enrollment			Centers
	Men	Women	Total	
Amealco de Bonfil	0	8	8	1
Cadereyta de Montes	573	948	1,521	1
Corregidora	614	1,114	1,728	3
El Marqués	2,093	758	2,851	1
Ezequiel Montes	178	1,152	1,330	1
Jalpan de Serra	438	988	1,426	1
Querétaro	7,982	10,344	18,326	67
San Joaquín	79	311	390	1
San Juan del Río	1,933	2,679	4,612	10
Tequisquiapan	248	1,138	1,386	2
Total	14,138	19,440	33,578	88

Source: F911 system for the national educational statistical integration of the SEP. Ministry of Education of the State Government. Basic Education Services Unit in the State of Querétaro. Subcoordination of Administrative Management. Direction of Educational Planning. Statistics Department.



### 5.4.3. Science and technology

The higher social and economic wellbeing indicators from developed countries show that their progress is proportional to their investment in education, science, technology and innovation.

Enterprises are the main generators of employment and wealth. It is of vital importance that they continue to increase their competitiveness to meet the market's demands. The constant innovation of their production processes requires the development of technology that adds value to the goods they produce.

This development is not exclusive of enterprises. There are other agents such as research centers, public and private institutions, and individuals, among others, that also conduct scientific and technological research activities that generate processes and products of a technological base.

#### Research centers and researchers

According to records from 2020, Querétaro has 54 research and technological development centers in which 3,524 researchers participate. Another 37 researchers affiliated to different institutions, to government and to universities, have also been recognized in the National System of Researchers (SNI for its Spanish abbreviation), which gives a total of 3,561 individuals dedicated to this activity.

In the Autonomous University of Querétaro alone there are 14 schools and departments that develop research lines, accommodating a total of 496 researchers.

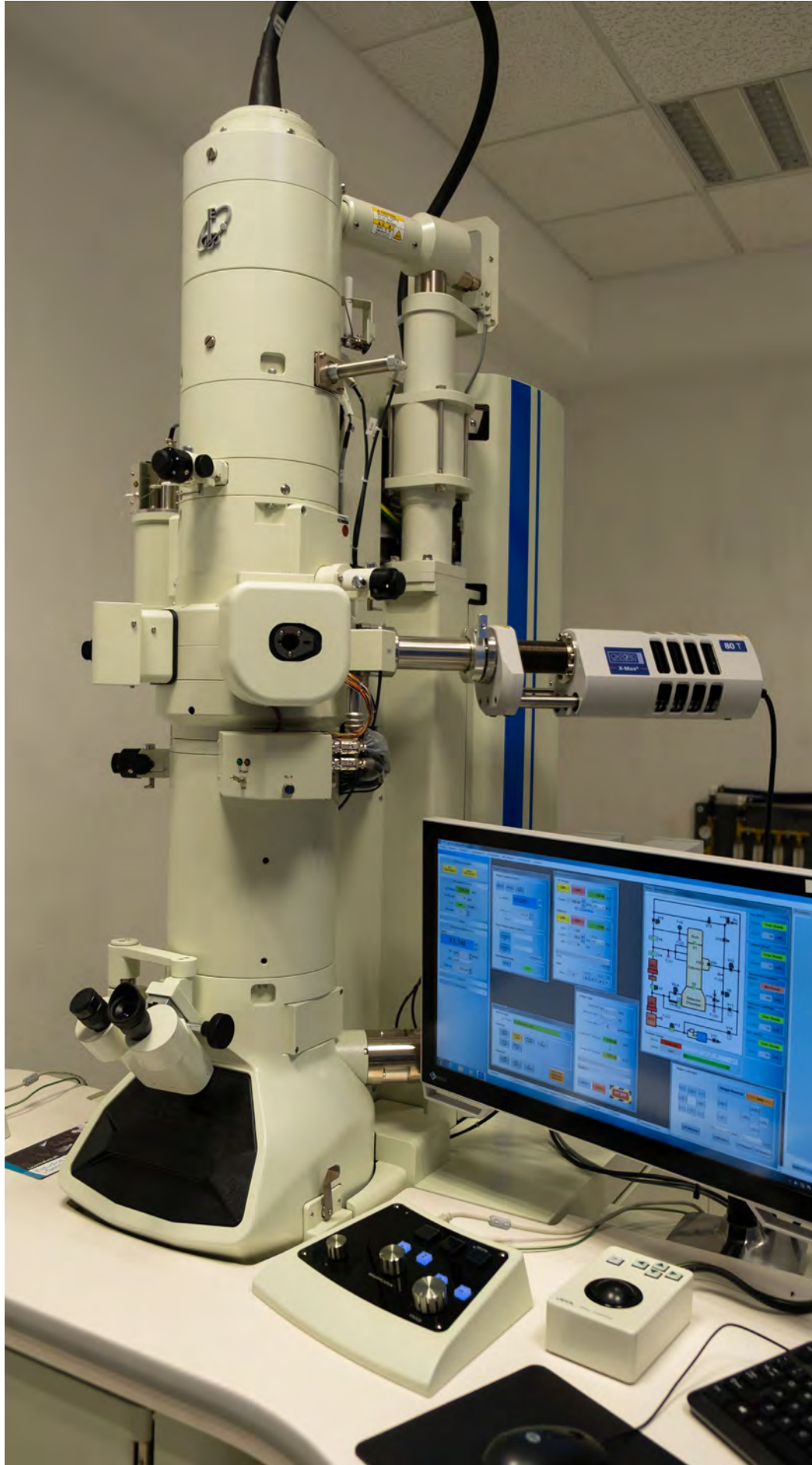
The 54 research centers in the entity are distributed as follows:



Research Centers of the Autonomous University of Querétaro, 2020.			
Department/School	Type	Researchears belonging to the S.N.I. <sup>1</sup> 2020	Total of researchers 2020
Natural Sciences	Higher education	70	82
Political and Social Sciences	Higher education	18	27
Colegio de Bachilleres Norte (North High Scool)	Vocational secondary education	3	3
Accounting and Administration	Higher education	13	23
Law	Higher education	16	21
Nursing	Higher education	2	5
School of Fine Arts	Vocational secondary education	10	26
Philosophy	Higher education	23	33
Computing	Higher education	4	7
Engineering	Higher education	108	140
Language and literature	Higher education	13	19
Medicine	Higher education	16	19
Psychology	Higher education	12	26
Chemistry	Higher education	55	65
Total		363	496

Source: CONCYTEQ with information provided by the Higher Education Institutions and Research Centers, 2021.  
<sup>1</sup>S.N.I.: The CONACYT's National System of Researchers.





Research centers in the state of Querétaro, 2020.

Institution	Type	Researchears belonging to the S.N.I. <sup>1</sup> 2020	Total of researchers 2020
Center for Industrial Engineering and Development (CIDESI)	CONACYT	31	152
Center for Advanced Technology (CIATEQ, A.C.)	CONACYT	7	160
Center for Research and Technological Development in Electrochemistry (CIDETEQ, S.C.)	CONACYT	26	86
Interdisciplinary Center for Research and Teaching in Technical Education (CIIDET)	Federal	5	10
National Research Center for Animal Physiology (CENIDFA-INIFAP)	Federal	14	34
National Metrology Center (CENAM)	Federal	13	161
INAH Center, Querétaro	Federal	1	13
National Institute of Forestry and Agricultural Research (INIFAP, Querétaro)	Federal	0*	9*
Mexican Institute of Transportation (IMT)	Federal	8	109
Center for Educational Research and Teacher Training (CIEFD-IMSS)	Federal	0	33
CARSO Research and Development Centre, CIDE (CONDUMEX, S.A. de C.V.)	Private	0	234
Center for Technology and Development (MABE, S. de R.L. de C.V.)	Private	1	300
Center for Technology and Development (TREMEC, S.A. de C.V.)	Private	0*	16*
Center for Advanced Engineering in Turbomachinery (CIAT-GE IQ)	Private	1	1,039
Mess Servicios Metrológicos S. de R.L. de C.V.	Private	0	4
Centro de Investigación Social Avanzada, A.C. (CISAV)	Private	0	16
NUCITEC S.A. DE C.V.	Private	1*	-
Continental	Private	N.E.	N.E.
Center for Research in Applied Science and Advanced Technology (CICATA-IPN)	Higher Education	22	37
Center for Research and Advanced Studies (CINVESTAV-IPN, Querétaro Unit)	Higher Education	23	25
High Technology Unit. Faculty of Engineering of the UNAM (UAT)	Higher Education	2	10
Institute of Neurobiology of the UNAM, Juriquilla Campus (INB)	Educación superior	56	58





Research centers in the state of Querétaro, 2020.

Institution	Type	Researchears belonging to the S.N.I. <sup>1</sup> 2020	Total of researchers 2020
CIEEN Center for Educational Research (ENEQ)	Higher Education	0*	5*
Technological and Higher Education Institute of Monterrey, Querétaro Campus (ITESM-CQ)	Higher Education	31	68
Technological Institute of Querétaro (ITQ)	Higher Education	10	52
Center for Applied Physics and Advanced Technology of the UNAM, Juriquilla Campus (CFATA)	Higher Education	26	32
Center for Geosciences of the UNAM, Juriquilla Campus	Higher Education	46	65
Research Laboratory of the Engineering Institute for Advanced Processes in Water Treatment, UNAM Juriquilla Campus - LIPATA	Higher Education	9	12
Technological University of Querétaro (UTEQ)	Higher Education	14	59
Technological Institute of San Juan del Río (ITSJR)	Higher Education	2	13
Technological University of San Juan del Río (UTSJR)	Higher Education	6	45
Polytechnic University of Querétaro (UPQ)	Higher Education	13	41
Teaching and Research Multidisciplinary Unit of the Faculty of Sciences of the UNAM, Juriquilla Campus (UMDI)	Higher Education	10	13
Aeronautical University of Querétaro (UNAQ)	Higher Education	3	34
Universidad del Valle de México (UVM)	Higher Education	11	18
Juriquilla Academic Unit of the UNAM Mathematics Institute, C.J. (IMAT)	Higher Education	13	14
Center of Teaching, Research and Extension in Animal Production in the Central High Plateau (CEIEPAA). Faculty of Veterinary Medicine and Zootechnics, UNAM	Higher Education	0*	25*
Polytechnic University of Santa Rosa Jáuregui (UPSRJ)	Higher Education	2	17
Technological University of Corregidora (UTC)	Higher Education	2	6
Universidad Anáhuac, Querétaro	Higher Education	3	3
Autonomous University of Querétaro (UAQ)	Higher Education	363	496
Total		775	3,524

Source: CONCYTEQ with information of the year 2019 provided by the Higher Education Institutions and Research Centers, 2020.  
<sup>1</sup>S.N.I.: The CONACYT's National System of Researchers.  
\* Data taken from the year 2018 given it has not been updated by the Research Center.  
N.S. Not specified.



### Applications for inventions made by Mexicans by federal entity

According to the Mexican Institute of Industrial Property (IMPI for its Spanish abbreviation) 1,132 applications for patents were submitted in 2020 by Mexicans in the different states around the country and 397 of them were granted. The fields in which more patents were granted to Mexican holders were those of articles for use and consumption with a total of 149, diverse industrial techniques with 78, and 72 for chemistry and metallurgy.

Applications for inventions made by Mexicans by federal entity, 2020.				
Federal Entity	Patents	Industrial designs	Utility models	Total
Aguascalientes	8	9	6	23
Baja California	24	5	20	49
Baja California Sur	3	-	2	5
Campeche	16	-	-	16
Chiapas	2	7	4	13
Chihuahua	19	78	21	118
Ciudad de México	220	248	185	653
Coahuila	64	7	13	84
Colima	4	3	2	9
Durango	4	4	2	10
Estado de México	74	111	66	251
Guanajuato	69	105	31	205
Guerrero	2	1	1	4
Hidalgo	19	3	8	30
Jalisco	217	142	81	440
Michoacán	10	4	7	21
Morelos	14	14	10	38
Nayarit	4	-	3	7
Nuevo León	70	140	47	257
Oaxaca	8	4	4	16
Puebla	80	13	23	116
Querétaro	42	28	21	91
Quintana Roo	1	38	10	49
San Luis Potosí	23	11	12	46
Sinaloa	54	11	12	77
Sonora	21	7	8	36
Tabasco	5	10	4	19
Tamaulipas	7	5	6	18
Tlaxcala	7	1	4	12
Veracruz	21	2	11	34
Yucatán	10	25	9	44
Zacatecas	7	3	5	15
Mexicanos que radican en el extranjero / Mexicans living overseas	3	9	1	13
Total	1,132	1,048	639	2,819

**Source:** Mexican Institute of Industrial Property in Numbers (IMPI in numbers).  
 "Note: On March 24, 2020 the IMPI suspended activities and terms in compliance with the provisions established by the Ministry of Health, due to COVID-19, resuming activities on July 6 and terms on July 13. In 2020, 3 applications for integrated circuit layout diagrams must be added for Mexico City, resulting in a total of 2,822."



# 5.4.4. Clusters

A cluster is defined as a group of interrelated companies that work within the same sector and that also collaborate strategically to obtain common benefits.

Querétaro has several different clusters that foster the growth and development of the companies that integrate them. Some of the most prominent ones are those of the aeronautical, automotive, information technologies and medical sectors.

These clusters resulted from the growing influx of businesses from the aforementioned sectors and, consequently, due to their need to establish a common working direction to increase productivity and consolidate the economic development of the state.



## Aeronautical Cluster

It was established in November 2012 under the triple helix concept: enterprise-academy-government. Its headquarters are in the National Center for Aeronautical Technologies (CENTA for its Spanish acronym). The Aeroclúster de Querétaro, A.C. (the cluster's registered name) resulted from the integration of seven companies and eleven institutions that represent the sector.

In 2019, over 70 members participated in this cluster, out of which 38 were aerospace companies, 12 were support companies, 10 were public and private educational institutions, 7 were research centers and 3 were public entities: the Ministry of Sustainable Development, the Science and Technology Council of the State of Querétaro and the International Airport of Querétaro. Additionally the Aereoclúster de Querétaro works with various federal and state authorities.

Specialty areas of companies that are part of the aeronautical cluster:

- Advanced manufacturing
  - Aerostructures
  - Systems and equipment
  - Engines
  - Special processes
- Maintenance, repair and operations (MRO)
  - Executive and private aircrafts
  - Passenger aircrafts
  - Landing gears and engines
- Design and Engineering
  - Design of advanced components for engines and aerostructures.



Querétaro's Aerocluster reports that there are over 80 companies and support entities registered in the entity that generate approximately 12,000 direct jobs. Direct jobs from the companies belonging to the cluster amount to 9,500.

Exports from the aeronautical companies in the cluster are mainly shipped to North America, France, Spain, Germany and the United Kingdom.

The aeronautical SMEs represent over 55% of the companies that are part of the association, constantly developing first article inspections and new part numbers mainly in the areas of machining, heat treatment and elastomeric and plastic components.

The lines of action developed by the aeronautical cluster are listed below:

1. Supply chain development.
2. Advancement of aerospace SMEs
3. Employment and training of human capital
4. Research and development
5. Certifications

According to the 2018/19 Aerospace Cities of the Future world ranking, Querétaro ranks in the Top Ten Aerospace Cities with Best Performance.





## Automotive Cluster

The Automotive Cluster of Querétaro, established in June 2013, has its headquarters in the Technological Park of the Technological and Higher Education Institute of Monterrey, Querétaro Campus (Instituto Tecnológico y de Estudios Superiores de Monterrey). Its integrating parties

created specialized human capital, industrial safety, asset security, supplier development, Tier 2 suppliers (TR2), operational excellence and technological development committees with the purpose of detecting the industry's main needs and finding the corresponding solutions based on the collaborative and connective work schemes of the triple helix.

The cluster is currently integrated by 97 members: 85 companies, 7 universities, 1 occupational training center, 1 technical school, 1 research and development center and 2 government entities, the Ministry of Sustainable Development (SEDESU) and the Science and Technology Council of the State of Querétaro.

To face the SARS-CoV-2 pandemic, the Automotive Cluster deployed a strategy to support its associates, which included the collection of data from member companies to generate strategic information on the evolution of the pandemic and its effects on the economic activity. With the support of the companies in the sector and the opinion of the relevant authorities, a basic protocol was prepared for the prevention of COVID-19 infections. There was also a close collaboration with the state's administration to provide support for the deployment of the strategy to combat the effects of the pandemic.

It is important to point out that in the state of Querétaro there are over 300 companies in this sector that, altogether, contribute with over 68,000 direct jobs.







## Information and Communication Technologies Cluster

Vórtice IT Clúster Querétaro – Integración Tecnológica de Querétaro, A.C. (registered name for the IT Cluster of Querétaro) started operations in March 2006 and it is located in its own technological park: Vórtice ITech Park, in Ciudad Maderas, Querétaro. It is integrated by just over 152 of the sector's companies of a technological base, 16 strategic allies from other sectors, 3 research centers, 6 state clusters, 18 universities, 4 private school and 6 government entities.

According to the cluster's information the state has just over 300 companies in the information technologies (IT) sector which participate with over 20,000 direct jobs.

Vórtice is the founder and part of the National Council of Software and IT Clusters which promote the strengthening of 24 clusters in the sector throughout the country, and bring together over 2,400 companies to attain national and international positioning of technologies developed in Mexico, proposing and promoting national public policies.

All of the associates take part in work groups where experts on each subject work collaboratively (digital transformation, automotive i 4.0, aeronautical i 4.0, innovation and entrepreneurship, infrastructure and Smartcity, human talent, public policy, agrotech and fostering of the sector). Every group has different objectives and projects that aim to benefit all the companies in every sector and the region.



Imagen: [www.facebook.com/clustervorticeit](https://www.facebook.com/clustervorticeit)



## Medical Cluster

Clúster Médico de Querétaro, A.C. (registered name for the Medical Cluster of Querétaro) is the most recently created cluster, starting its operations in June 2014. Its members meet in the facilities of the Confederation of Employers of the Mexican Republic (COPARMEX Querétaro chapter). Is it currently integrated by eleven hospitals and clinics, seven universities, the SEDESU and the Ministry of Health



## Plastics Cluster

It started operations on November 10th, 2016, and is located in the neighborhood Desarrollo San Pablo in the city of Querétaro. It is integrated by 50 companies of the plastics sector and 10 from other sectors among which there are 2 research centers and 2 universities.

According to the cluster's information, the state has approximately 600 micro, small and medium plastics enterprises (MSMEs) and 30 die production and maintenance enterprises which participate with around 12,000 direct jobs and over 13,500 indirect ones.

Programs:

1. It has 4 commissions.
  - a. Certification-education and training.
  - b. Affiliation.
  - c. Social responsibility
  - d. Government projects.
2. Machinery and equipment projects for supplier development, and human resources for personnel development.
3. Supply chain integration and business development..
4. Certifications: companies proud of being plastics enterprises and socially responsible companies.
5. Training and diploma courses in die and die-cut design, maintenance, metrology and material quality.
6. Mapping of die and tool maintenance companies and suppliers.

## Logistics Innovation Cluster (CILQRO for its Spanish acronym)



It started with 10 founding members in February of 2018 and it is located at Av. Zaragoza 330. It is integrated by 46 companies from the logistics sector related to activities such as transportation lines, customs agents, consulting firms, logistics operators, government institutions, among others.

The CILQRO follows the triple helix guidelines: industry, academy and government. It plans on reaching 60 affiliates in 2021 with the main purpose of potentiating logistics in the state and the Bajío region.

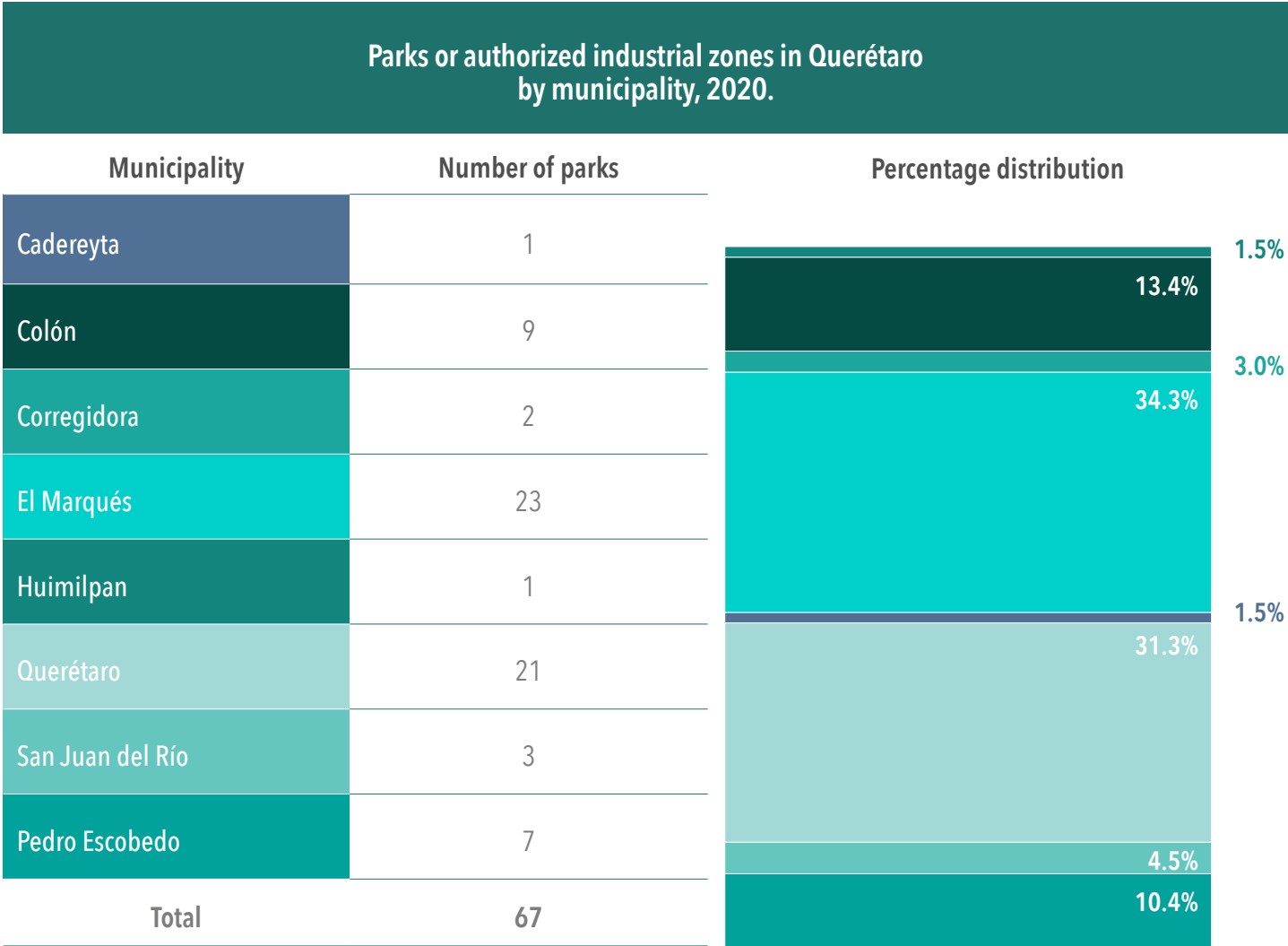
To combat the effects of the pandemic, the logistics sector did not stop, especially in the area of essential items, so that prevention measures against COVID-19 were in place from the beginning of the pandemic.



# 5.5. Parks and industrial zones

According to the information provided by the Department of Environmental Control of SEDESU, there is a registry of 67 parks and authorized industrial zones in Querétaro. As evidenced by complexes that have been operating for a long time, others that have been recently created, and some more that are being developed, industrial activity in the state is already a tradition that is being constantly renovated.

The municipality of El Marqués has 34.3%; Querétaro has 31.3%; Colón 13.4%; San Juan del Río, Pedro Escobedo, Corregidora, Huimilpan and Cadereyta combine the remaining 20.9%.



Source: SEDESU. Environmental Subsecretariat. Department of Environmental Control, 2021.





Authorized industrial parks in the state of Querétaro, 2020.

Cadereyta de Montes		El Marqués		Querétaro		San Juan del Río	
Parque Industrial Cadereyta		Parque Industrial El Marqués Finsa Querétaro Microparque Industrial La Noria Parque Industrial Aeropuerto O'Donnell Parque Industrial Aeropuerto Parque Industrial Advance Qro. La Bomba Industrial Park Conjunto Industrial P.K.Co Global Park Querétaro Parque Industrial Ciudad Maderas Parque Industrial PyME Parque Industrial Calamanda Arso Park VYNMSA Villa del Marqués Prime Park Just In Time Parque Industrial Quadrum Terra Park Centenario Euro Park Puerta Querétaro FRISA Parque Tecnológico Innovación Querétaro Parque Industrial Advance Conin		Conjunto Industrial Sotavento Zona Industrial San Pedrito Peñuelas Parque Vía Verde Fraccionamiento Industrial Benito Juárez Parque Industrial Jurica Parque Industrial Querétaro Polígono Empresarial Santa Rosa Parque Industrial San Isidro Microparque P88 Parque Migro1 Microparque Industrial Jofre Park NAVEX Park Condominio Industrial SPM Polígono empresarial Buena Vista Dynamik Park Eqropak Microparque Born-Makro Parque Industrial Vie Verde Querétaro II Navetec Santa Rosa Terrakia Parque Industrial Querétaro Sur		Fraccionamiento Industrial Valle de Oro Tierras Coloradas Nuevo Parque Industrial	
Colón						Pedro Escobedo	
Vesta Park Querétaro Agropark Aerotech Industrial Park Parque Aeroespacial de Querétaro Ferroparque Industrial Point Novotech Aeropuerto Parque Industrial Aeropuerto Querétaro (PIA) VYNMSA PARK etapa 2						Conjunto Industrial Las Palmas Parque Industrial Elysium Exeter Cantera Industrial Park Finka San Antonio Agropark Parque Industrial Q2 Saloro Business Park Parque Industrial Q3	
Corregidora						Huimilpan	
Complejo Industrial Balvanera Parque Industrial El Pueblito						Parque Industrial PyME	

Source: SEDESU. Environmental Subsecretariat. Department of Environmental Control, 2021.





## Industrial settlements

Through the "Induction Form" format, SEDESU, in joint collaboration with municipal, state and federal agencies, depending on the case, evaluates and decides on the settlement of new industries, the expansion of the existing ones, or the regularization or relocation of the ones that are already operating, adhering to the criteria established by the Industrial Law of the State of Querétaro and other provisions currently in force.

In the period between January and December 2020, 69 applications were reviewed from which 47.8% were for new companies and expansions, 27 were new and 6 expanded their facilities. During that same period, 34 companies were regularized and 2 companies were relocated, with which the industry maintains its operations in optimal conditions regarding environmental care.

Industries with Induction Form, 2020.	
Type	Applications
Relocation	2
Regularization	34
Establishment	27
Expansion	6
Total	69

Source: SEDESU, Department of Industrial Development, 2021

Through the single window for applications, 60 requests from 45 established companies, or companies to be established in the state, were answered during the period from January to December 2020. The main support provided was facilitation, management and the bringing together of entrepreneurs and institutions to carry out their application procedures for: permits, licenses, hydraulic infrastructure, electricity, etc.

Single window for applications, 2020.	
Agency	Requests
CEA	4
CFE	9
Municipalities	16
Foreign Affairs	7
Others	24
Total	60

Source: SEDESU, Department of Industrial Development, 2021

During 2020, 27 projects were completed in different municipalities of the state in the aeronautical, automotive, food and beverage, electrical appliance, TIC, and plastics sectors, among others.

New investment projects, 2020.	
Municipality	Number of projects
El Marqués	10
Querétaro	8
Colón	6
Pedro Escobedo	1
Corregidora	1
San Juan del Río	1
Total	27

Source: SEDESU, Department of Industrial Development, 2021



# 5.6. Environmental impact

## 5.6.1. Evaluation of the environmental impact

The evaluation can be conducted in different modalities: Preventive Report of the Environmental Impact, Manifestation of the Environmental Impact or Induction Form, according to the nature of the application and the criteria established by the Ministry of Sustainable Development.

Its objective is to evaluate and, if applicable, rule out those projects whose realization, suspension, expansion, modification, demolition or dismantling of works or activities may cause ecologic imbalances by surpassing the limits and conditions established in the applicable regulations.

The evaluation is the procedure through which the competent authorities determine the relevance of the execution of works or specific activities, establishing, if applicable, the conditions to which they must adhere to avoid or minimize negative effects on the ecologic balance or the environment.

### Environmental Processes

The Online Procedures Platform, which is a digital tool that allows users in general to access information and obtain authorizations in environmental matters, was developed as a result of the systematization to improve the consultation, integration, review and publication of the information collected in relation to the procedures and services of public and private entities.

Process	Number of processes served
Registration in the registry of environmental service providers in consulting, laboratories and vehicle verification	15
Registration in the registry of environmental service providers for waste services	335
Registration in the registry of environmental service providers for experts responsible of quarry	48
Vehicle verification records	5,959
Vehicle verification permits	6,147
Vehicle verification extensions	25
Registration of projects in the environmental protection fund	33
Induction forms	102
Evaluation of environmental impact	346
License for exploiting quarry	170
Spoil bank permits	62
Attention to public works	300
State Environmental License	117
Annual Emissions and Pollutant Transfer Registry Report	891
Open-air burning permits	43
Permits for the management of special-handling waste	66
Registration of special-handling waste management plans	48

Source: SEDESU, Department of Environmental Control, 2021.



# 5.6.2. National Program for Environmental Auditing (PNAA for its Spanish abbreviation)

This mechanism is of a voluntary nature and it allows productive and service organizations to get certified and prove, through an audit, that they are in compliance with the environmental legislation.

The PNAA's objective is to improve the environmental performance of participants so that it is above the law's requirements. The companies' compliance with the federal and local environmental legislation in force is verified, and also that they are adopting self-regulatory measures and good operating and engineering practices.

Depending on the economic activity of the company, the PNAA grants three types of certificates:



**Clean Industry.**  
For companies that carry out manufacturing and transformation activities.



**Environmental Quality**  
Applicable for companies that carry out commercial and service activities.



**Touristic Environmental Quality**  
For companies that provide touristic services and activities.



During 2019, the state of Querétaro registered 90 companies having a valid certificate of which 58 are Clean Industry certificates, 31 are Environmental Quality certificates and 1 is Touristic Environmental Quality certificate.

The municipalities registered as having companies with a valid certificate in the PNAA are the following:

Municipality	Companies with a valid certificate
Querétaro	46
El Marqués	17
San Juan del Río	16
Colón	4
Corregidora	3
Cadereyta de Montes	1
Ezequiel Montes	1
Pedro Escobedo	1
Tequisquiapan	1
Total	90

Source: The Federal Attorney of Environmental Protection (PROFEPA for its Spanish acronym). National Program for Environmental Auditing (PNAA), 2019.

Similarly, during the same year, the Regional Office of Environmental Audits in the state of Querétaro reported that 60 companies are in the process of obtaining the environmental certificate. The following table lists the companies that are processing it, by municipality.

Municipality	Companies in the process of obtaining the certificate
Amealco de Bonfil	1
Cadereyta de Montes	1
Colón	4
Corregidora	1
El Marqués	11
Ezequiel Montes	1
Pedro Escobedo	3
Querétaro	31
San Juan del Río	7
Total	60

Source: The Federal Attorney of Environmental Protection (PROFEPA for its Spanish acronym). National Program for Environmental Auditing (PNAA), 2019.

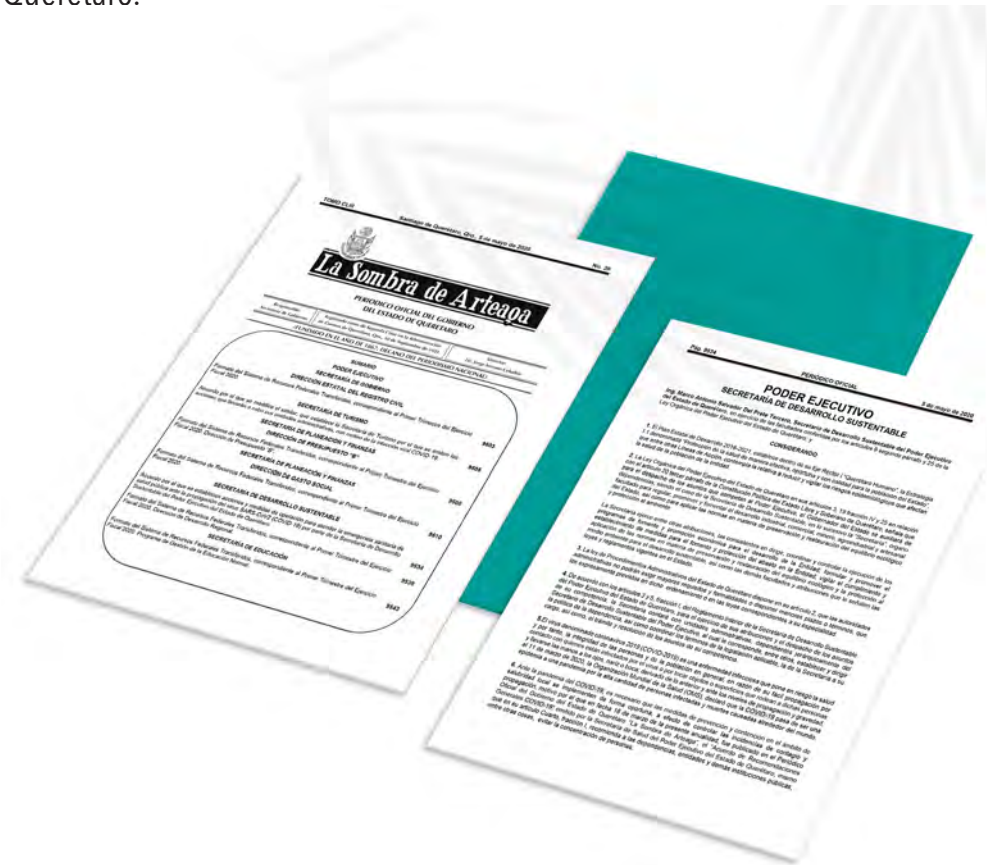


# 5.7. Regulatory Improvement

The Federal Commission of Regulatory Improvement is responsible for developing efficient public policies to generate and implement clear regulations, simplified processes and services, and effective institutions to monitor their creation and implementation.

With the aim of strengthening and applying the regulatory framework in environmental matters, and contributing towards the regulatory improvement of the environmental processes of the Executive Power of the State of Querétaro, as well as to support the fight against the public health emergency derived from the COVID-19 pandemic, the following agreement was created and published in the official newspaper of the state "La Sombra de Arteaga" on May 5, 2020:

"Agreement establishing actions and operational measures to address the public health emergency due to the spread of the SARS-COV2 virus (COVID-19) by the Ministry of Sustainable Development of the Executive Power of the State of Querétaro."



# 5.8. Moody's and S&P Credit Ratings

## Moody's

The evaluator Moody's Investors is an international credit rating agency that analyzes commercial and government entities. It can evaluate the quality of a country's or a financial entity's debt.

In September 2020, the state of Querétaro reflected a credit which implies positive operative results, balanced financial results on average, very low levels of indebtedness and a strong liquidity.

## Standard and Poor's (S&P)

Another one of the agencies acting as a high-level evaluator is Standard and Poor's, the American financial services company. It is a division of S&P Global, which publishes reports on financial research and stock and bond analysis.

On October 2020, S&P Global Ratings awarded a global and national rating showing a resilient economy and prudent fiscal management measures, which despite the weakening of fiscal results, Querétaro will probably continue to reduce its debt, keeping it at a low level.









It is integrated by the sector of the economy dedicated to providing services to commerce, education, health, banking and financial documents, transportation and communications. It also includes other social and personal services that are not classifiable.

In mature economies, whose industrialization has long been a reality, the tertiary sector grows as the market becomes more complex and diversifies.

The behavior of economic activities allows the elaboration of a map that reflects the branches that acquire greater relevance in each entity of the country.

Querétaro stands out among the states with the greatest economic activity nationwide. Its most dynamic sector is the tertiary sector, where there is an important group of commercial and service companies

# TERTIARY SECTOR

**10<sup>TH</sup>** NATIONAL PLACE  
IN THE TERTIARY SECTOR

QUARTERLY INDICATOR OF STATE ECONOMIC ACTIVITY (ITAE) GENERATED BY THE NATIONAL INSTITUTE OF STATISTICS AND GEOGRAPHY (INEGI)

**WITH 116.9 points**  
AN AVERAGE OF  
**FOURTH TRIMESTER OF 2020**

IT IS THE SECTOR THAT CONTRIBUTES THE MOST  
**57.3%**  
**SGDP CONTRIBUTION**  
**231,382** MILLION PESOS  
[STATE GROSS DOMESTIC PRODUCT]

CONTRIBUTED TO THE GDP  
**67.6% SERVICES**  
**TRADE 32.4%**

**ESTABLISHMENTS**  
**43.4%** COMMERCIAL  
SECTOR  
**SERVICES 36.5%**

**INSURED WORKERS**  
**303,750** AT THE END OF 2020

**529,847 PEOPLE** IN THE STATE  
REPRESENTS 60% OF THE EMPLOYED POPULATION

**2<sup>ND</sup>** NATIONAL PLACE IN  
**CREDIT AGREEMENTS**  
FOR EVERY 10,000 ADULTS

**3<sup>RD</sup>** NATIONAL PLACE IN  
**BRANCH ACCESS**  
FOR EVERY 10,000 ADULTS

**GDP** IN THE SECTOR **= 10.9%** TRANSPORT, POST AND STORAGE SERVICES / **6.3%** FINANCIAL AND INSURANCE SERVICES

FDI AND FOREIGN TRADE

DURING 2020, QUERÉTARO RECEIVED  
**FDI | 845.7** MILLION DOLLARS  
[FOREIGN DIRECT INVESTMENT]

**670** MILLION DOLLARS  
IN PROFIT REINVESTMENT IN THE STATE

MÉXICO HAS SIGNED  
**13 FREE TRADE**  
AGREEMENTS WITH MARKET  
ACCESS FROM **50** NATIONS

THE COUNTRY HAS  
**29 AGREEMENTS WITH 30 COUNTRIES**  
FOR RECIPROCAL PROMOTION AND PROTECTION OF INVESTMENTS (APRPIs)



# 6.1. Trade

In 2019, Querétaro’s commercial activity recorded an amount of 75,081.7 million pesos. This amount represents 32.4% of GDP in the tertiary sector of the state.

## 6.1.1. Domestic Trade

According to the ITAEE published by the INEGI, in the fourth quarter of 2020 the internal market and its elements registered a considerable activity. This boosted wholesale and retail sales showing an overall index of 115.1 points.

In December 2020, according to data from the Mexican Institute of Social Security (IMSS), 98,035 people were formally working in commercial activities. This meant a participation of 16.5% of the workers in the entity and an annual growth of 3.4%.

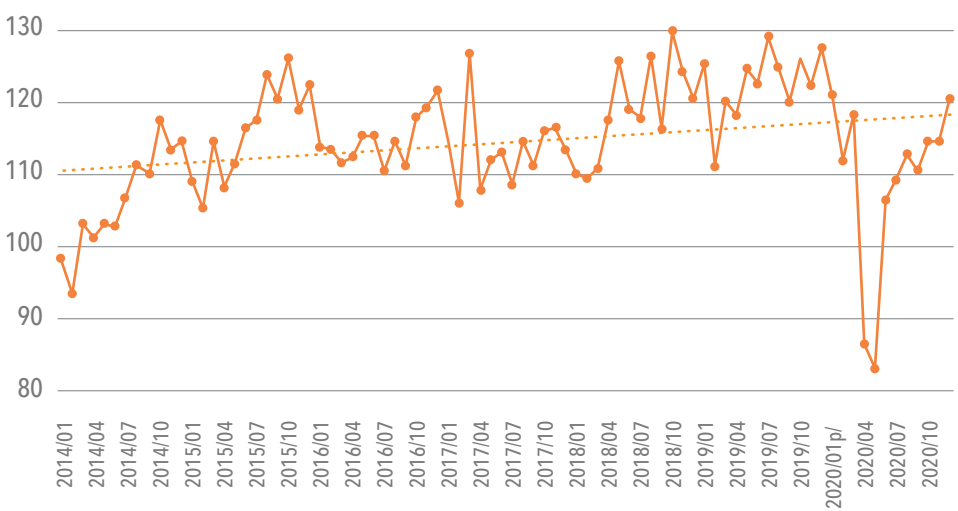


### Wholesale Trade

According to figures from the INEGI, wholesale trade contributed with 41,798.04 million pesos to the state’s GDP in 2019. This activity represents 10.3% of annual production and a growth of 4.4% compared to 2018.

The Monthly Survey of Commercial Companies (EMEC for its Spanish abbreviation) shows the dynamics of income from the supply of goods and services by wholesale trade. The following graph shows income performance since January 2014, where the index was 98 growing to 120.5 in December 2020, having a 22.9% increase.

Index of income from the supply of goods and services by wholesale trade.

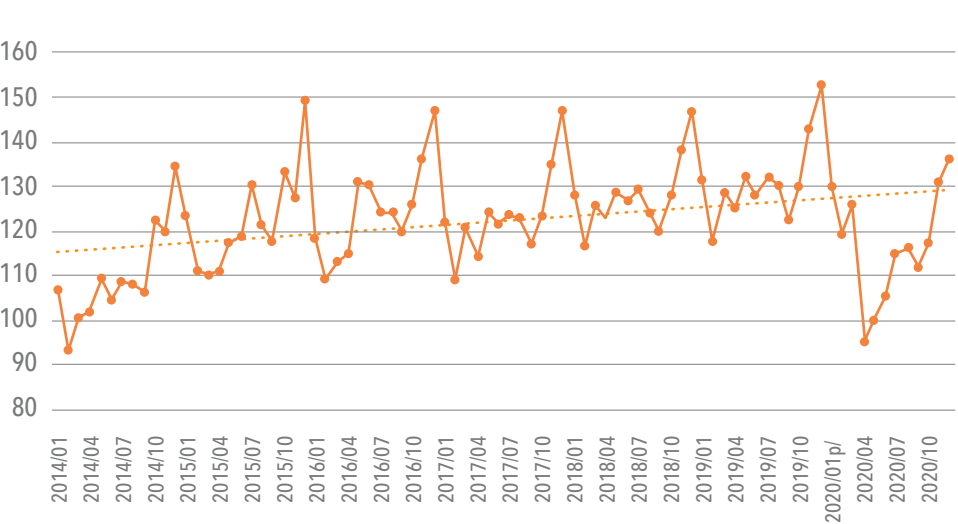


### Retail Trade

In 2019, retail trade contributed 33,283.7 million pesos to the state’s GDP, representing 8.2% of that year’s production and a decrease of 7.8% compared to 2018. The amount of 36,092.4 million pesos was generated from this activity in 2018.

Also, the EMEC records income from retail trade. For the period from 2014 to 2019, the lowest level of the index was presented in April 2020 with 96 points and in December 2019 the highest peak was reached with 153 points.

Index of income from the supply of goods and services by retail trade.



Source: National Institute of Statistics and Geography (INEGI). Monthly Survey on Business Enterprises (EMEC).



6.1.2. Foreign Trade

International trade represents the exchange of products and services between different countries. It fulfills two main purposes: the first, to satisfy the internal demand for products and services that are not generated within the country; the second, to take one’s own internal production to external markets that demand it.

This sector is subject to the regulations established by the producers and buyers themselves of the goods and services and the governments of the countries of origin and destination that participate in the exchange.

Trade agreements signed by Mexico

The Ministry of Economy reports that Mexico participates in 13 Free Trade Agreements (FTAs) signed with 50 countries, holds 29 Agreements for the Promotion and Reciprocal Protection of Investments (APRPI) with 30 nations and has 9 agreements of limited scope in the context of the Latin American Integration Association (LAIA).

It also participates actively in multilateral and regional organizations and forums such as the World Trade Organization (WTO), the Asia-Pacific Economic Cooperation (APEC) and the Organization for Economic Cooperation and Development (OECD), among others.



Source: World Trade Organization (WTO), Regional Commerce, 2019.

Free trade agreements signed by Mexico.			
Agreement	Short name	Signatory countries	Valid since:
Agreement between Mexico, the United States and Canada *	T-MEC	Mexico, United States and Canada	July 1, 2020
Agreement between Mexico - Panamá	FTA Mexico - Panama	Mexico and Panama	July 1, 2015
Agreement between Mexico - Perú	Mexico - Peru FTA	Mexico and Peru	February 1, 2012
Mexico - Colombia Free Trade Agreement	TLC - G2	Mexico and Colombia	August 2, 2011
Mexico - Chile Free Trade Agreement	FTA Mexico - Chile	Mexico and Chile	August 1, 1999
Free Trade Agreement between Mexico and the European Union	TLCUEM	Mexico and member countries of the European Union	July 1, 2000
Mexico-Israel Free Trade Agreement	Mexico - Israel FTA	Mexico and Israel	July 1, 2000
Free Trade Agreement between Mexico and the Oriental Republic of Uruguay	TLC Mexico - Uruguay	Mexico and Uruguay	July 15, 2004
Mexico Free Trade Agreement and European Free Trade Association	FTA Mexico - AELC	Mexico, Iceland, Liechtenstein, Norway and Switzerland	July 1, 2001
Free Trade Agreement between Mexico and the Republics of Costa Rica, El Salvador, Guatemala, Honduras and Nicaragua.	TLC - Central America	Mexico, Costa Rica, Guatemala, Honduras, El Salvador and Nicaragua	September 1, 2012
Mexico-Japan Free Trade Agreement	FTA Mexico - Japan	Mexico and Japan	April 1, 2005
Pacific alliance	AP	Mexico, Peru, Colombia and Chile	May 1, 2016
Trans-Pacific Partnership Agreement	CP TPP	Mexico, Australia, Brunei Darussalam, Canada, Chile, Japan, Malaysia, New Zealand, Peru, Singapore and Vietnam	December 30, 2018

Sources: Ministry of Economy. Foreign trade. Countries with Treaties and Agreements signed with Mexico, 2021.



# Customs Office of Querétaro

It was founded in July 22, 1983 and is currently located on the State Highway 200, Querétaro-Tequisquiapan km 22.5, in the municipality of Colón, Querétaro. The states of Querétaro, Hidalgo and 88 municipalities of Michoacán belong to the territorial district of this Customs Office.

Customs clearances for goods are carried out by air, land and rail through the Customs section of Hidalgo and the Strategic Bonded Warehouse.

The tactical points that integrate the Customs Office of Querétaro are:

## Tactical points that integrate the Customs Office of Querétaro.

Customs Office of Querétaro

Customs Office of Hidalgo located at Atotonilco de Tula, Hidalgo.

International Airport of Querétaro

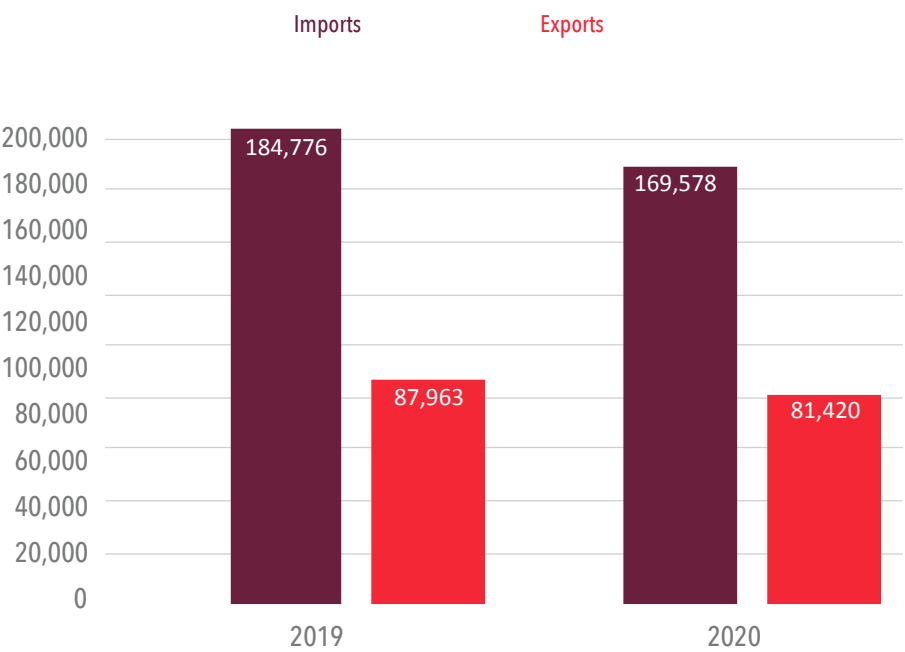
"Gral. Francisco J. Mujica" International Airport of Morelia, Michoacán.

"General Ignacio López Rayón" International Airport, Uruapan, Michoacán.

In 2019 the Customs Office of Querétaro increased electronic commerce operations, also known as e-commerce, through the courier companies such as DHL Express Mexico, S.A. de C.V. and Federal Express Holdings Mexico y Cia.

For the year, 2020, a total of 250,998 import and export operations were processed, representing a variation of -8% with respect to 2019.

## Operations. (January-December)



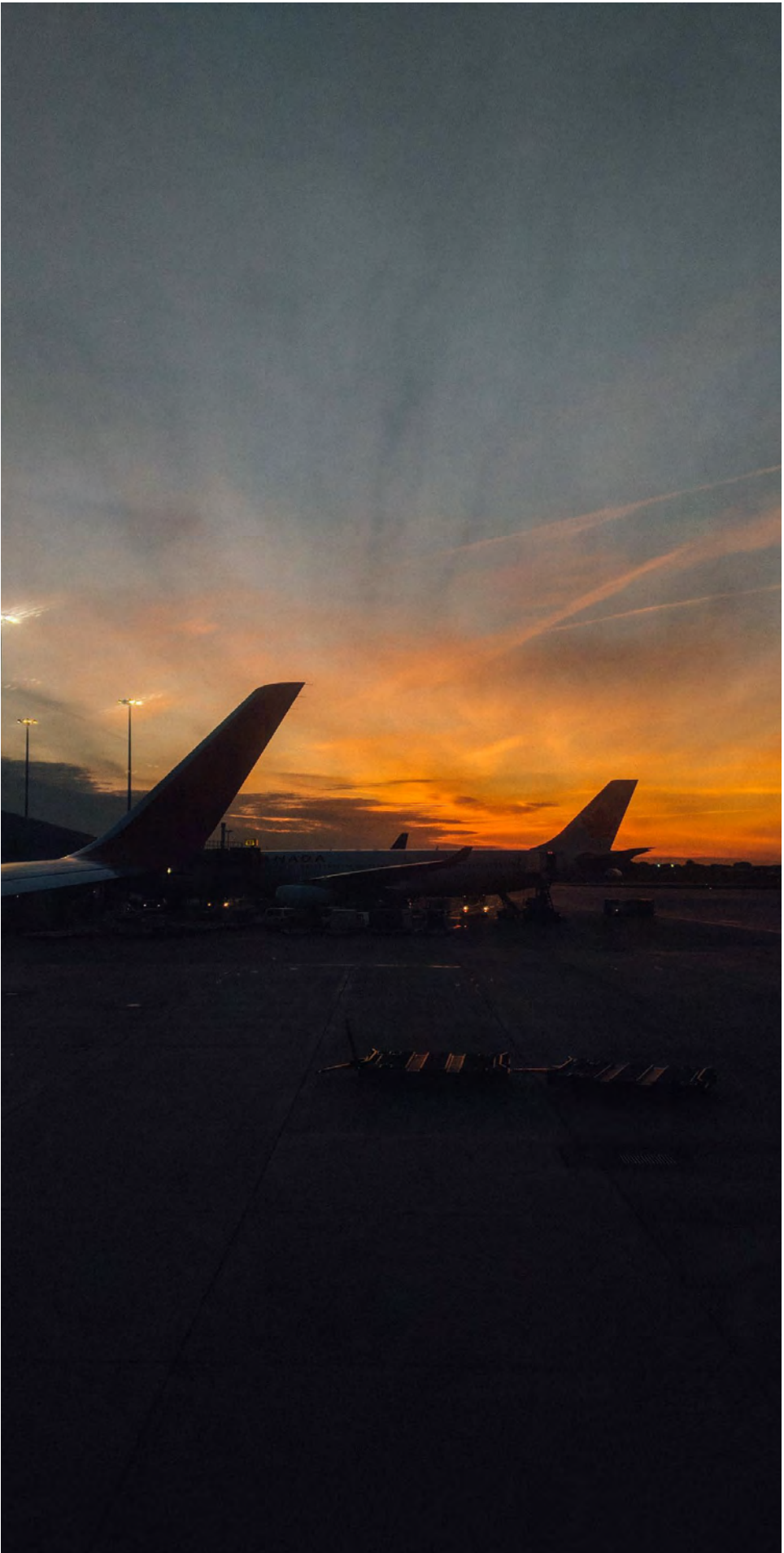
Source: Ministry of Finance and Public Credit. Tax Administration Service. Strategic Analysis, Querétaro Customs.

According to the North American Industrial Classification System (SCIAN for its Spanish abbreviation), import activity was driven by the sectors of the automotive industry, such as the manufacture of other automotive parts, other manufacturing industries, the manufacture of other electrical products and other wholesale trade intermediaries. The main export sectors are the manufacture of other parts for automotive vehicles, other personal services, other manufacturing industries and the manufacture of other metal products.

There are 6 customs agents assigned and 40 authorized to operate in the Customs Office of Querétaro and its district.

There are two bonded warehouses authorized to provide the service of handling, storage and custody of goods and a strategic bonded warehouse:

- Terminal Logistics, S.A. de C.V. (CR: 210)
- Terminal Intermodal Logística de Hidalgo, S.A.P.I. de C.V. (CR: 230).
- RFE (Spanish abbreviation for Recinto Fiscalizado Estratégico, or Strategic Bonded Warehouse) Puerto Interior Querétaro, (IR 11).

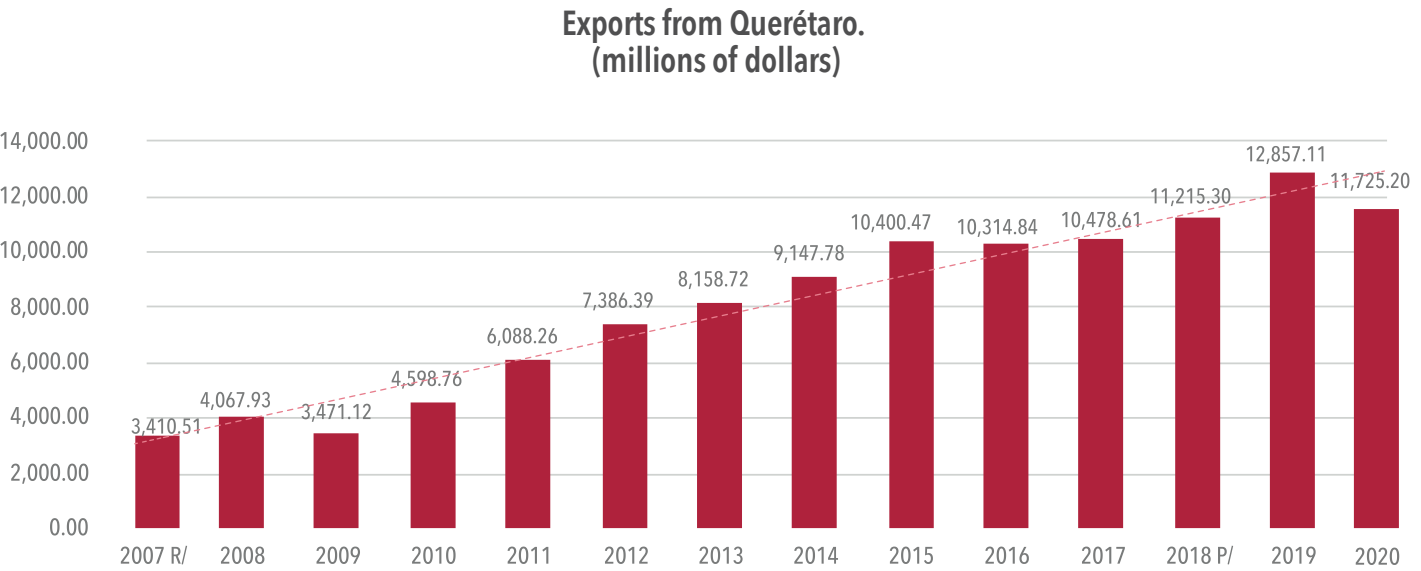




Exports in the State of Querétaro

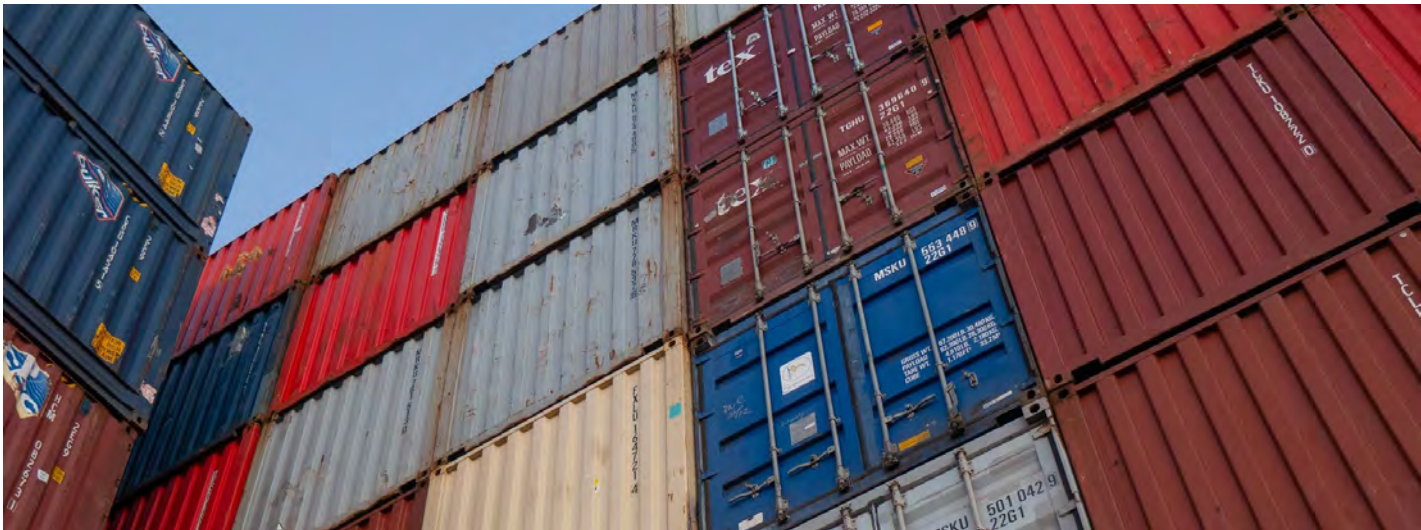
The total value of the state's exports for the third quarter of 2020 was 11,725.20 million dollars, which represented an increase of 8.8% compared to the same period of the previous year.

The performance of exports is shown in the following graph:



Source: National Institute of Statistics and Geography. Quarterly Exports by State, 2021.  
R / Results reviewed as of the date indicated, the foregoing due to the update of the calculation methodology derived from the incorporation of the Statistical Business Registry of Mexico (RENEM) and the Monthly Survey of the Manufacturing Industry as statistical sources.  
P / Preliminary figures as of the date indicated.

The activities with the largest share of exports are the manufacture of transportation equipment, with 50.6%; and the manufacture of accessories, electrical appliances and power generation equipment, with 16.3%.



Exports from Querétaro by activity subsector according to North American Industrial Classification System (SCIAN).  
(millions of dollars)

SCIAN activity subsector	2015	2019	2020
Food industry	272.52	314.07	326.98
Beverage and tobacco industry	16.89	19.71	22.68
Manufacture of textile products, except clothing	C	C	C
Manufacture of garments	59.15	43.40	31.47
Wood Industry	0.00	-	-
Paper industry	173.70	256.16	242.56
Printing and related industries	326.31	42.03	30.83
Manufacture of petroleum and coal products	85.43	C	5.27
Chemical industry	397.24	420.85	415.07
Plastic and rubber industry	255.12	501.04	477.09
Manufacture of non-metallic mineral-based products	88.69	136.52	148.14
Basic metal industries	24.53	22.71	10.23
Manufacture of metal products	193.27	154.87	192.73
Manufacture of machinery and equipment	754.26	1,136.80	806.56
Manufacture of computer, communication, measurement equipment and other electronic equipment, components and accessories	891.45	1,264.46	960.45
Manufacture of accessories, electrical appliances and electrical power generation equipment	1,528.71	1,986.96	1,908.58
Manufacture of transport equipment	5,158.59	6,356.41	5,932.81
Other manufacturing industries	C	C	C
Subsectors unspecified	174.63	97.38	77.38
Total	10,400.47	12,857.11	11,725.20

Source: National Institute of Statistics and Geography. Quarterly Exports by State, 2021  
Notes: Subsectors not specified correspond to the amounts of those subsectors that are not presented due to confidentiality, which include a "C". "-" There is no information available to determine whether exports are made in the corresponding subsector. 0 No exports are made in that period by any of the establishments in the corresponding subsector. The sum of the partials may not equal the total due to rounding.  
P / Preliminary figures as of the date indicated.



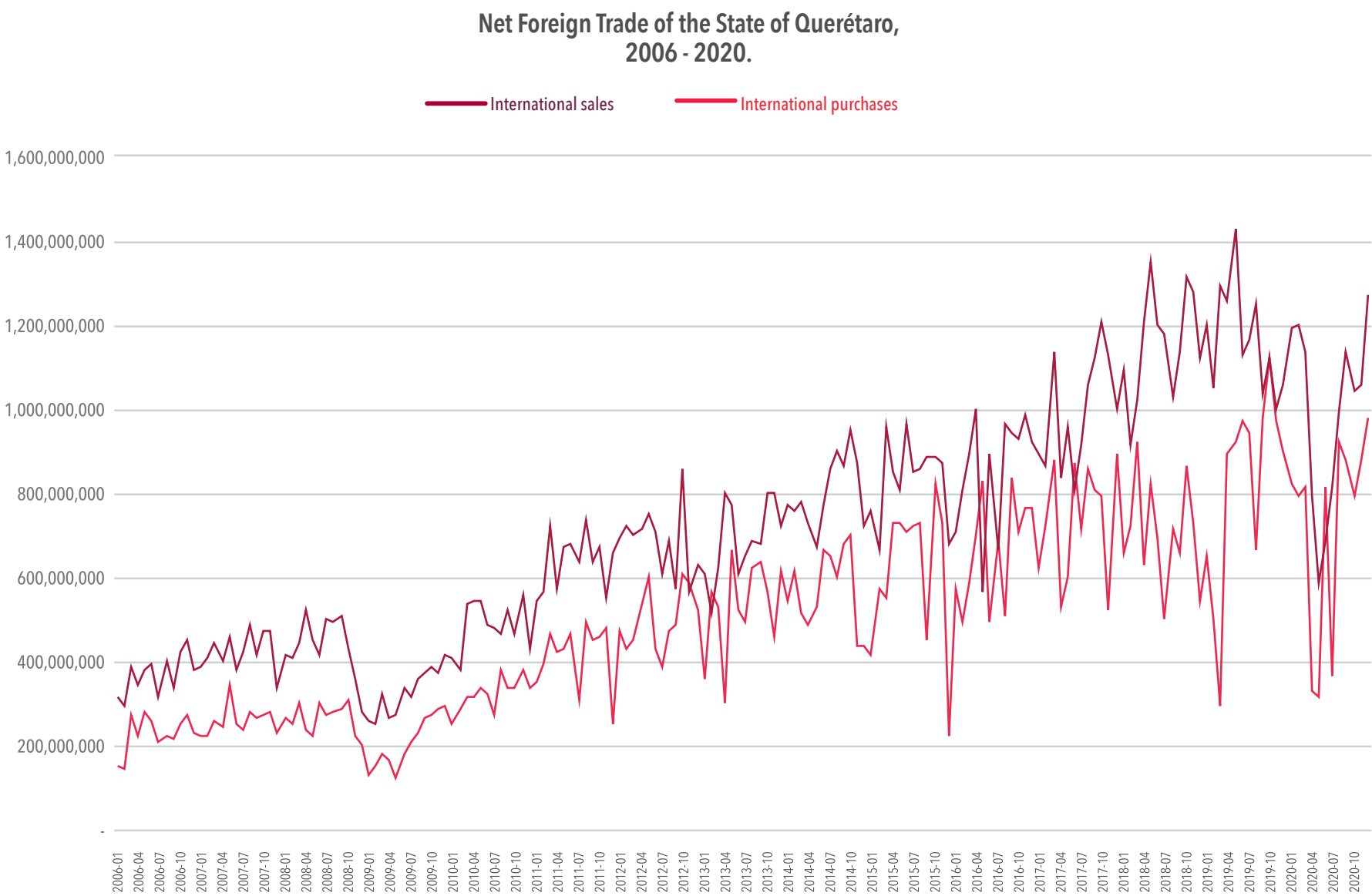
The main products exported in 2020, according to Data Mexico, were parts and accessories for automotive vehicles, refrigerators, freezers and other refrigeration or freezing equipment and appliances for filtering or purifying liquids or gases.

The main international sales destinations in 2020 were the United States, Canada and France.

It is worth mentioning that Data Mexico uses international sales to refer to the total sales abroad of legal entities whose fiscal domicile is registered in the State of Querétaro. Thus, international sales by state represent a different concept from that of exports by state, which is published by the INEGI.

On the other hand, there are the international purchases where Data Mexico reports that the main products imported from the manufacturing sector in 2020 are parts and accessories of motor vehicles, axles and cranks; bearings, bearing housings and other speed changers and motors and generators. The main countries of origin of the products imported in 2020 were the United States, China and South Korea.

Considering the balance of international purchases and sales of the state, the following results are shown.



Source: Data Mexico. Ministry of Economy. [www.dataMexico.org/es/profile/geo/queretaro-qt](http://www.dataMexico.org/es/profile/geo/queretaro-qt)





# 6.2. Foreign Direct Investment (FDI)

## Activities that are considered in FDI:

According to the Payments Balance Manual (BPM5) of the International Monetary Fund (IMF) and the Benchmark Definition of Foreign Direct Investment (BD4) of the Organization for Economic Cooperation and Development (OECD), FDI is the category of cross-border investment made by a resident abroad in a Mexican company or in assets located in national territory with the purpose of establishing a lasting interest.

Through this contribution to the company, the direct investor seeks to exercise a significant degree of influence. Due to its nature, FDI can generate permanent relationships of funding and technology transfer with the purpose of maximizing the production and profits of the direct investment company.

## Activities that are not considered as FDI:

The key point for an investment to be considered FDI is that funding comes directly from the investor. This is exactly what is required to determine whether or not a specific type of funding is considered as FDI.

In addition to FDI, companies can receive resources from other funding sources. These may be of any type as long as they come from businesses other than direct investors.

## 6.2.1. Foreign investment in the country

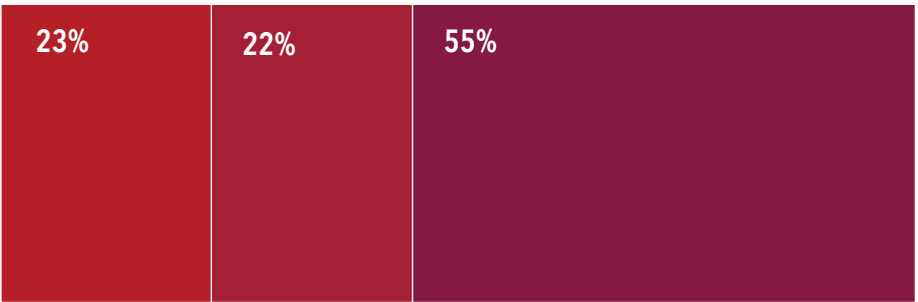
In the year 2020, according to figures reported by the Ministry of Economy, Mexico registered \$29,079 million dollars (mdd) in foreign direct investment.

The report on global investment of the United Nations Conference on Trade and Development (UNCTAD) is published in June of each year. According to the 2020 report, Mexico ranked fourteenth as a recipient country in 2018.

FDI in Mexico is shown below.

FDI by type of investment in Mexico, 2019 and 2020. (million of dollars)		
Concept	Total 2019	Total 2020
New investments	13,168.5	6,408.5
Reinvestment of profits	17,986.8	16,095.7
Accounts between companies	2,941.6	6,575.3
Total	34,096.9	29,079.4

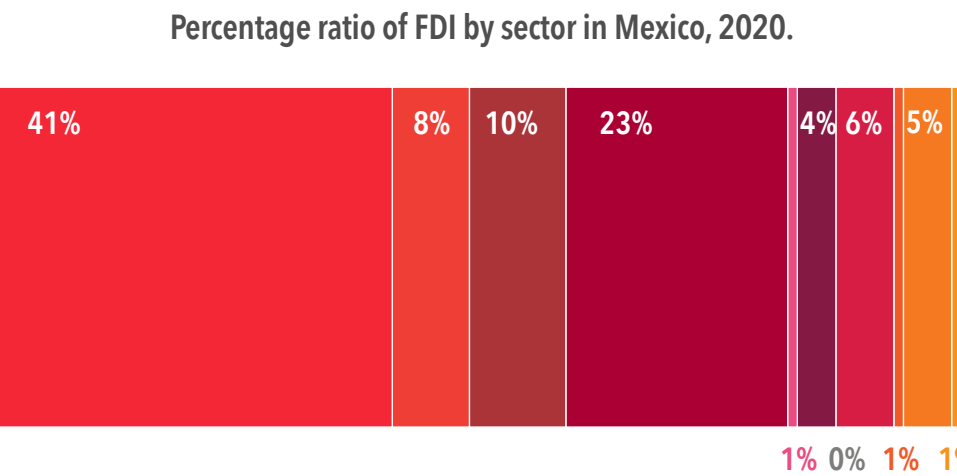
Percentage distribution of FDI by type of investment in Mexico, 2020.



Source: Ministry of Economy. Competitiveness and Regulations. Foreign Direct Investment, 2021.

During 2020 the secondary sector contributed 48.2% to national FDI; the tertiary sector 51.2%; and the primary sector 0.5%. The manufacturing industry was the sub-sector with the greatest fund-raising system, receiving 40.6% of FDI in Mexico.

National FDI by main sectors, 2019 and 2020. (millions of dollars)		
Sector	Total 2019	Total 2020
Primary sector	105.56	146.59
Energy, water and gas supply through pipelines to the final consumer	1,238.43	413.59
Mining	1,920.11	1,341.66
Building	348.48	459.01
Manufacturing industries	15,963.46	11,815.59
Commerce	3,236.91	2,231.48
Transport, mail and storage	870.52	2,853.32
Financial and insurance services	5,415.74	6,748.86
Real estate and rental services of movable and intangible property	1,225.58	378.51
Temporary accommodation and food and beverage preparation services	1,232.93	1,058.42
Others	2,539.22	1,632.40
Total	34,096.93	29,079.43



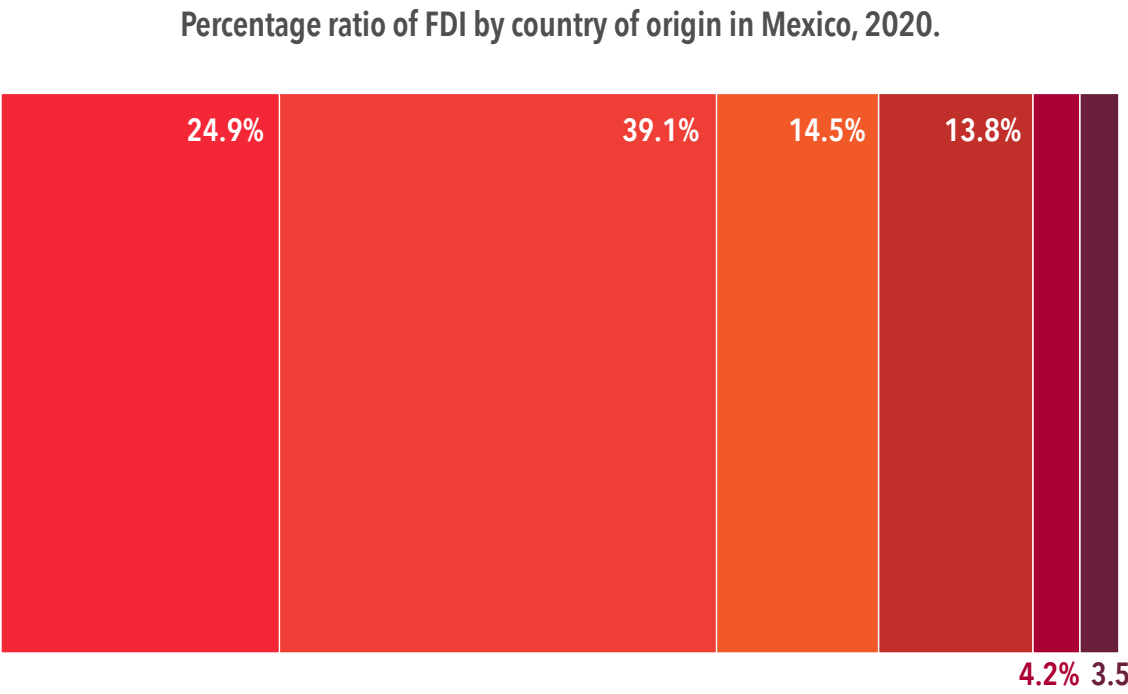
Source: Ministry of Economy. Competitiveness and Regulations. Foreign Direct Investment, 2021.  
Note: The primary sector includes: agriculture, animal husbandry and exploitation, forestry, fishing and hunting.  
Note: The totals do not match the sum of the partials because some statistical data correspond to one or two companies and are shown as confidential.



FDI comes mainly from the United States, Canada, Spain, Japan and Germany. The following table shows involvement per country.

National FDI by country of origin, 2019 and 2020. (millions of dollars)			
Country 2019	Total	Country 2020	Total
United States of America	12,795.4	United States of America	11,355.8
Spain	4,063.0	Canada	4,224.3
Germany	3,445.7	Spain	3,998.8
Canada	2,987.0	Japan	1,218.6
Italy	1,499.8	Germany	1,024.1
Others	9,292.2	Others	7,250.7
Total	34,096.9	Total	29,079.4

Source: Ministry of Economy. Competitiveness and Regulations. Foreign Direct Investment, 2021.  
Note: The totals do not match the sum of the partials because some statistical data correspond to one or two companies and are shown as confidential.



Source: Ministry of Economy. Competitiveness and Regulations. Foreign Direct Investment, 2021.  
Note: The totals do not match the sum of the partials because some statistical data correspond to one or two companies and are shown as confidential.



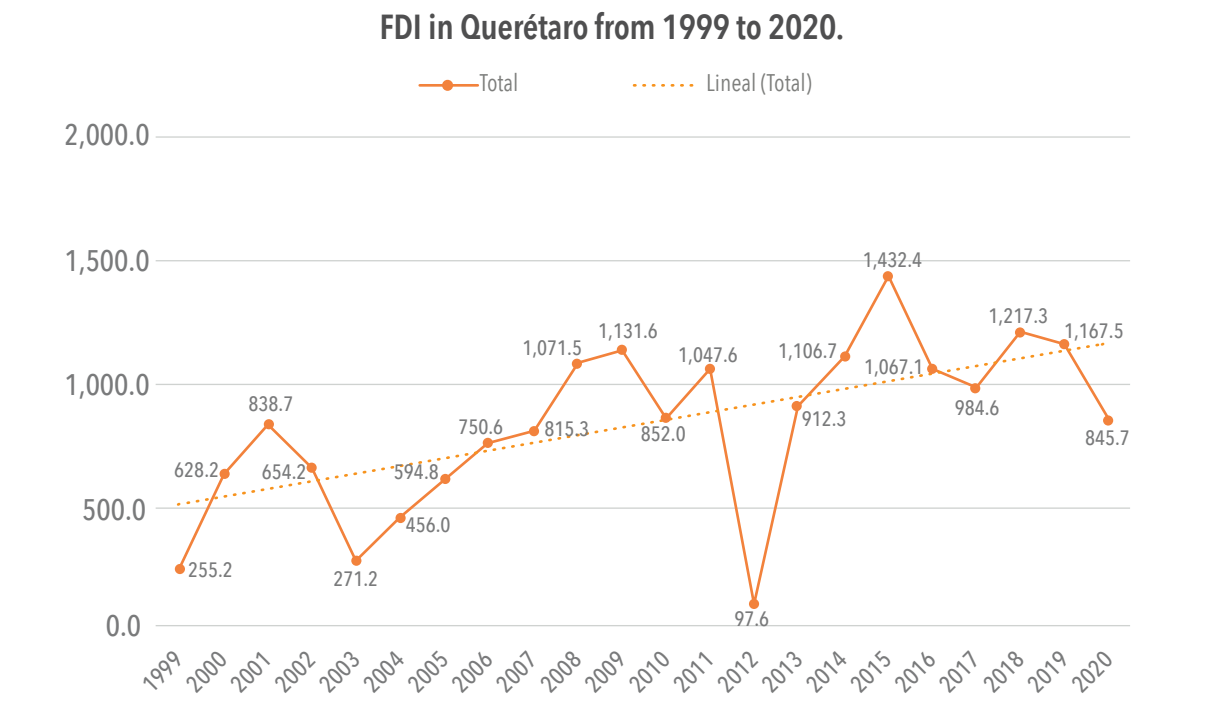
### 6.2.2. Foreign investment in the state

During 2020, the accumulated value of FDI in Querétaro amounted to 845.7 million dollars, a figure lower than that reported in 2019. Of the total FDI, 79.2% corresponds to reinvestment of profits.

During the first quarter of the year, 84.6% of the total annual FDI in the state was recorded.

FDI by type of investment in Querétaro, 2019 and 2020. (millions of dollars)		
Concept	Total 2019	Total 2020
New investments	659.8	352.3
Reinvestment of profits	625.8	670.0
Accounts between companies	-118.1	-176.5
Total	1,167.5	845.7

Source: Ministry of Economy. Competitiveness and Regulations. Foreign Direct Investment, 2021.



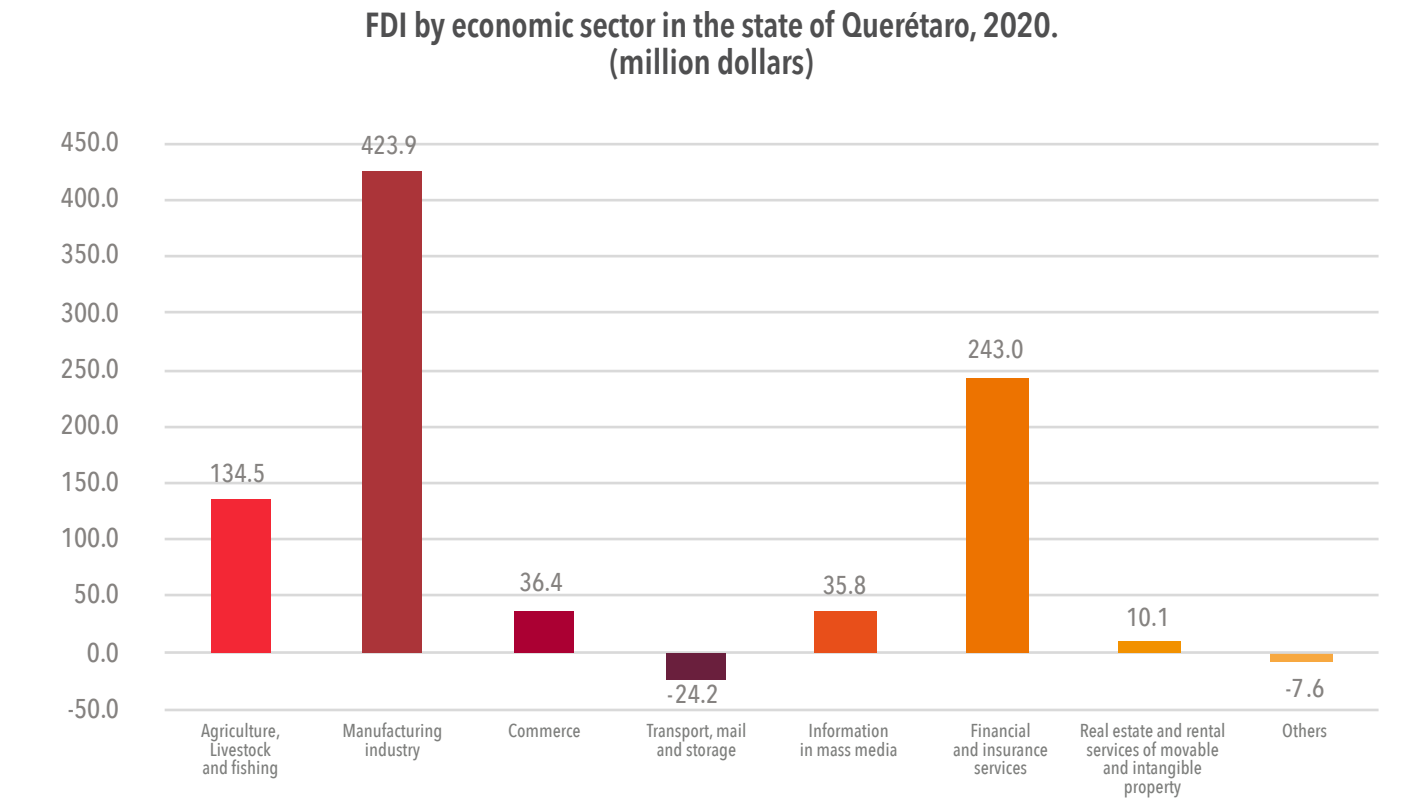
Source: Ministry of Economy. Competitiveness and Regulations. Foreign Direct Investment, 2021.



The manufacturing industry received more than half of the FDI with 50.1%; of this, 33.6% went to the manufacture of products based on non-metallic minerals, 14.4% to the manufacture of machinery and equipment and 10.7% to the chemical industry. The complete information is shown in the following table:

FDI by economic sector in the state of Querétaro, 2019 and 2020. (millions of dollars)		
Sector	Total 2019	Total 2020
Agriculture, Livestock and fishing	21.9	134.5
Manufacturing industry	614.1	423.9
Commerce	57.2	36.4
Transport, mail and storage	5.0	-24.2
Information in mass media	25.1	35.8
Financial and insurance services	398.1	243.0
Real estate and rental services of movable and intangible property	22.3	10.1
Others	5.4	-7.6
Total	1,167.5	845.7

Source: Ministry of Economy. Competitiveness and Regulations. Foreign Direct Investment, 2021.  
Note: The totals do not coincide with the sum of the partials because the statistical data corresponding to the letter "C" is confidential. The construction industry is included in section defined "others"

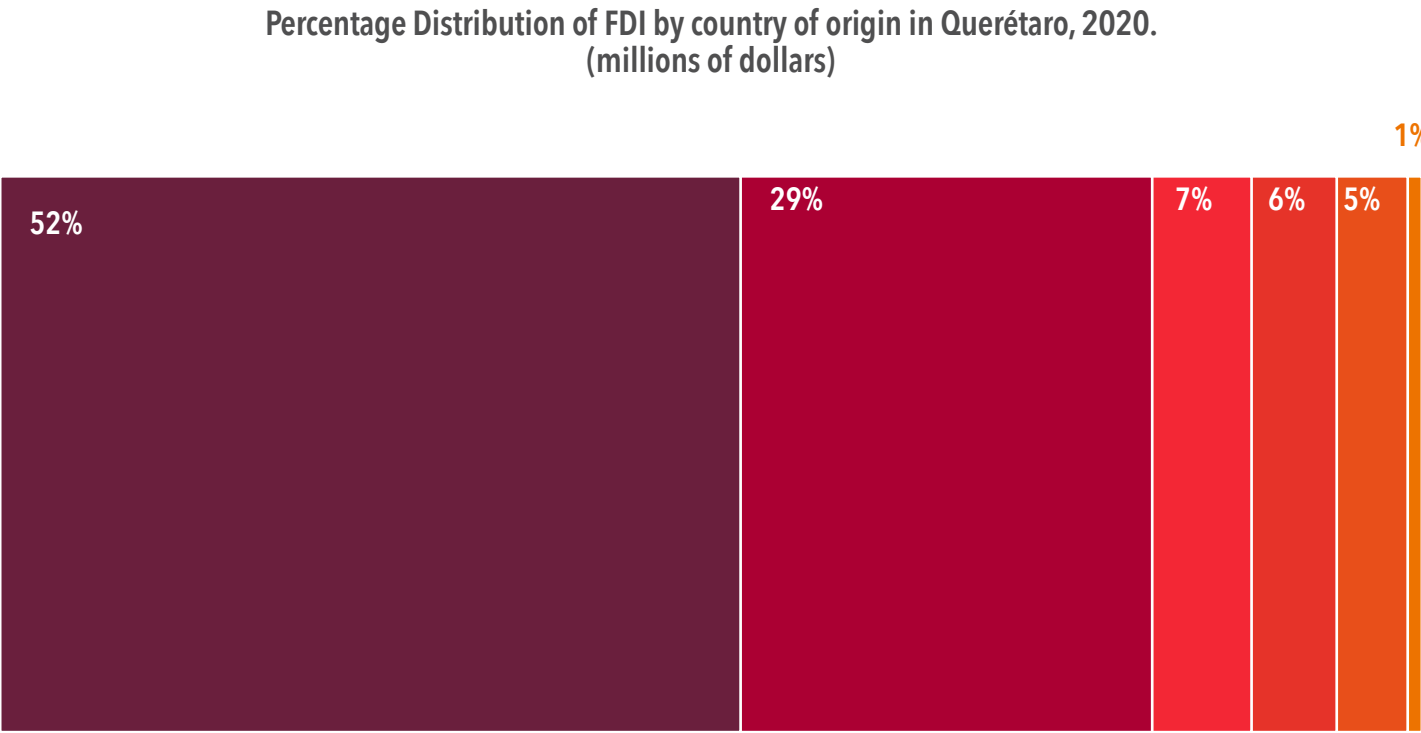


Source: Ministry of Economy. Competitiveness and Regulations. Foreign Direct Investment, 2021.

The United States of America, Spain, Switzerland, Sweden and Canada were the main investors in Querétaro during 2020. Detailed information is shown below:

FDI by country of origin in Querétaro, 2019 and 2020. (millions of dollars)			
Country	Total 2019	Country	Total 2020
Spain	390.3	United States of America	423.6
United States of America	356.3	Spain	234.0
France	139.4	Switzerland	60.9
Canada	87.8	Sweden	48.4
Japan	54.0	Canada	43.7
Others	136.0	Others	4.5
Total	1,167.5	Total	845.7

Source: Ministry of Economy. Competitiveness and Regulations. Foreign Direct Investment 2021.  
Note: The totals do not match with the sum of the partials because some statistical data for some countries are shown as confidential.



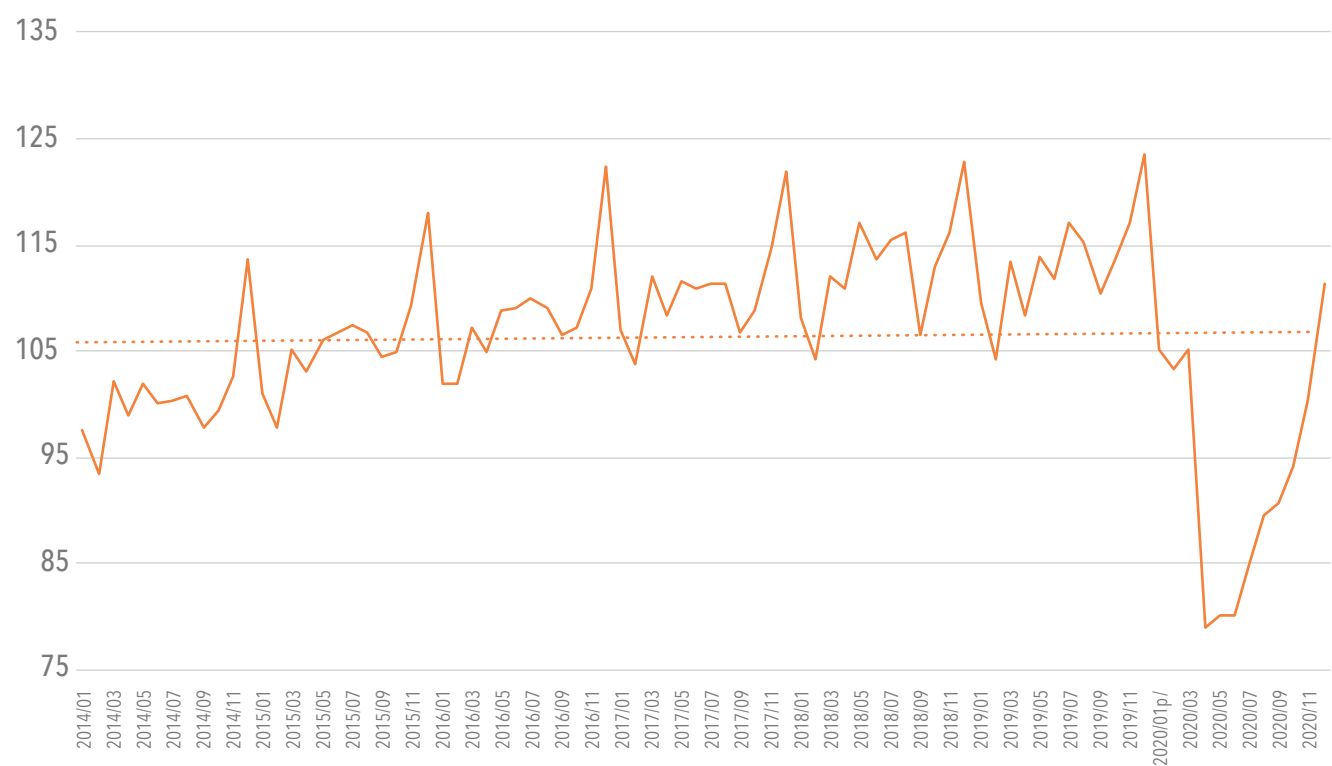
Source: Ministry of Economy. Competitiveness and Regulations. Foreign Direct Investment 2021.



# 6.3. Services

According to the Monthly Service Survey (EMS for its abbreviation in Spanish), the national index of non-financial private services has shown a recovery following the months of April, May and June of 2020. The highest record was in December 2019 with 123.6 points. For its part, the ITAEE reports an index of 116.9 points in tertiary activities for Querétaro as of the fourth quarter of 2020, a decrease of 3.8% compared to the same quarter of the year 2019.

National Index of private non-financial services, 2014 - 2020.



Source: National Institute of Statistics and Geography (INEGI). Monthly Survey of Services (EMS).

Services are a fundamental part of the tertiary sector and have an important involvement in the state's economy by providing goods and resources that are constantly used by the majority of the population. In Querétaro this sub-sector registered 156,300 million pesos during 2018. These represent 67.6% of the tertiary sector's GDP, leaving the remaining 32.4% to commerce.

## 6.3.1. Transport, communication and storage services

These are the services related to the transfer of people and goods. Movements both from the interior of the country and those originating from and to foreign countries are included, regardless of the means they use: land, air or sea.

The transport branch includes the economic units dedicated to offer cargo and passenger transfer services, as well as the related activities, such as storage, loading, unloading and stowing of goods. This sector also includes customs, tourism and travel agencies, airports and transport rental, among others.

Communications include establishments that provide mail, telegraph, telephone, message exchange and communication channels through the use of microwaves, radio communications and satellites.

According to figures from the INEGI, during the year 2019, transport, mail and storage services contributed 10.9% of the GDP of the state's tertiary sector, a percentage that meant a decrease of 3,110.81 million pesos compared to 2018.



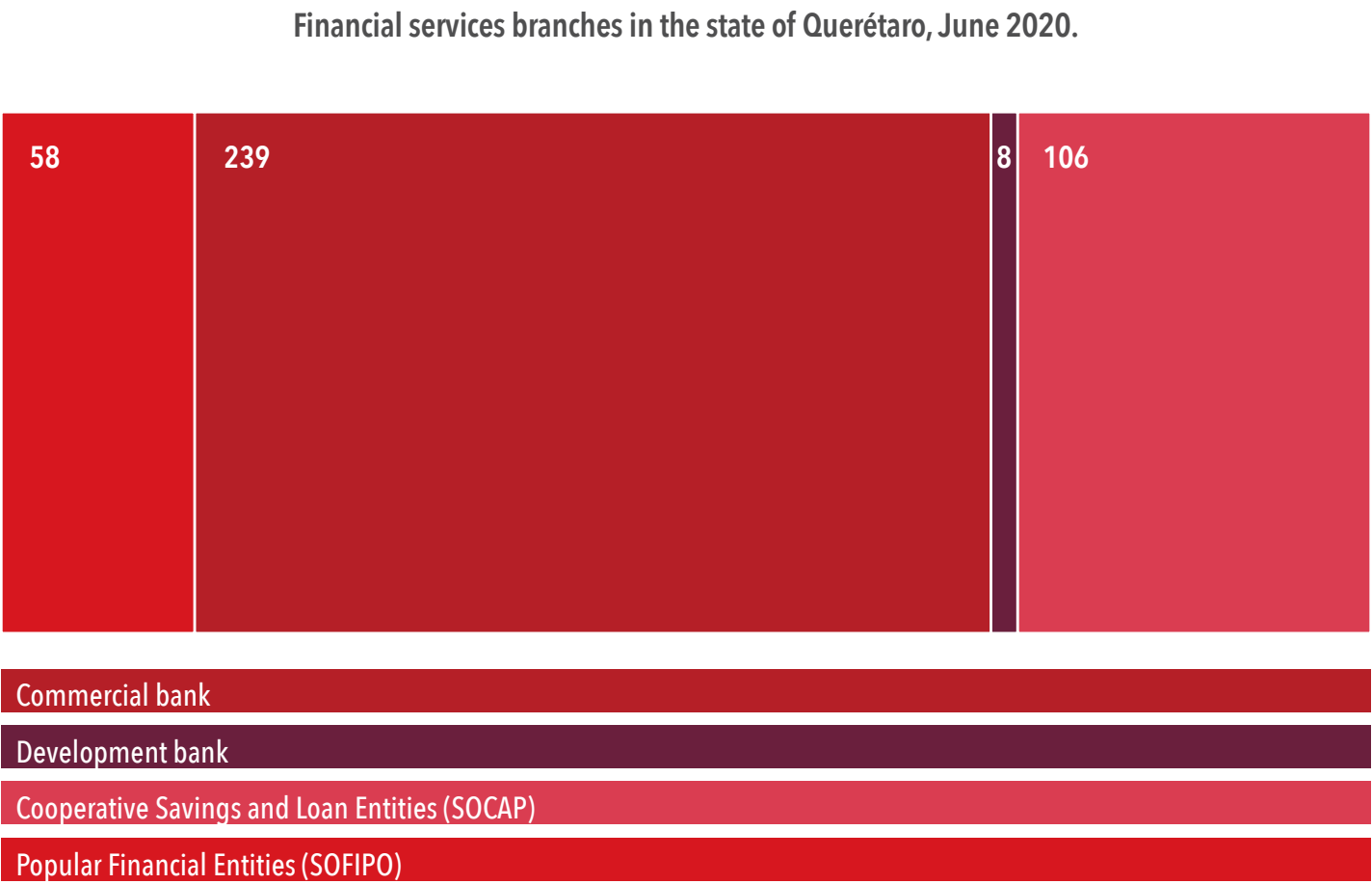


### 6.3.2. Financial services and insurance

It is the group of formal products and services with which we seek to satisfy the demand of all segments of the population and companies. This offer seeks to be a platform that promotes economic development through different routes and access channels with financial institutions. The action is translated into the offer and access to savings, credit or cash flow instruments that promote investment and security for their users.

#### Financial infrastructure in the state of Querétaro

The breakdown of the set of elements and tools shows the dynamism of the state’s economy. The accessibility and efficiency of these services are an indicator of its competitiveness. Detailed information is shown below:

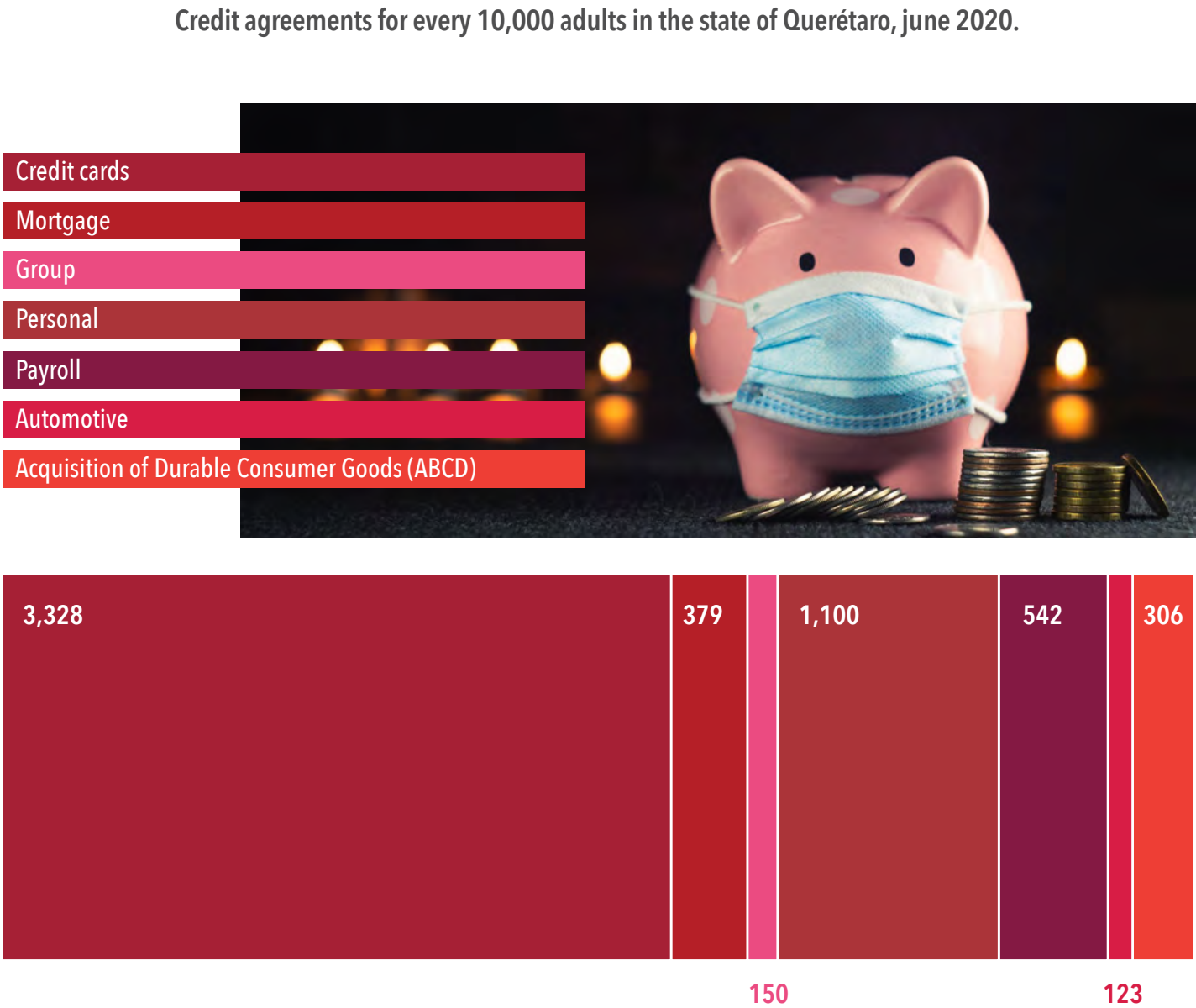


Source: National Banking and Stock Commission. Financial Inclusion databases, June 2020.

#### Credit agreements and transaction flow in the state

In Querétaro, financial inclusion has meant gradually moving towards an economy with greater opportunities for the population’s development and growth. These results can be seen in the confidence that financial institutions have and in the capacity to offer the leverage of credit to support regional projects.

The most requested type of credit is through credit cards, followed by personal and payroll credits.



Source: National Banking and Stock Commission. Financial Inclusion databases, June 2020.



Querétaro ranks third in access to branches per 10,000 adults, with 2.6, which is almost one unit more than the national average of 1.7:

Branch access points for every 10,000 adults nationwide.					
#	State	Branch offices	#	State	Branch offices
1	Mexico City	2.7	17	San Luis Potosí	1.6
2	Colima	2.7	18	Coahuila	1.6
3	Querétaro	2.6	19	Sonora	1.6
4	Jalisco	2.5	20	Tamaulipas	1.5
5	Nuevo León	2.4	21	Zacatecas	1.5
6	Guanajuato	2.3	22	Baja California	1.4
7	Yucatán	2.2	23	Hidalgo	1.4
8	Nayarit	2.2	24	Oaxaca	1.4
9	Quintana Roo	2.1	25	Durango	1.4
10	Baja California Sur	2.1	26	Veracruz	1.4
11	Morelos	2.0	27	Puebla	1.4
12	Michoacán	1.9	28	Guerrero	1.3
13	Aguascalientes	1.8	29	Tabasco	1.3
14	Campeche	1.8	30	Mexico	1.2
	National	1.7	31	Tlaxcala	1.1
15	Chihuahua	1.7	32	Chiapas	1.0
16	Sinaloa	1.7			

Source: National Banking and Stock Commission. Financial Inclusion databases, June 2020.



The state ranks second in credit agreements per every 10,000 adults. The credits included in this ranking are credit cards, mortgage, group, personal, payroll, automotive and loans for the Acquisition of Durable Consumer Goods (ABCD for its Spanish abbreviation).

Credits agreements for every 10,000 adults nationwide.					
#	State	Contratos	#	State	Contratos
1	Mexico City	12,903	17	Baja California	4,939
2	Querétaro	5,929	18	Chihuahua	4,929
3	Nuevo León	5,916	19	Tlaxcala	4,929
4	Morelos	5,776	20	Nayarit	4,871
5	Baja California Sur	5,678	21	Veracruz	4,831
6	Aguascalientes	5,664	22	Guanajuato	4,796
7	Quintana Roo	5,593	23	Michoacán	4,793
8	Yucatán	5,578	24	Hidalgo	4,735
	National	5,544	25	Tabasco	4,490
9	Coahuila	5,491	26	Guerrero	4,478
10	Sinaloa	5,467	27	San Luis Potosí	4,455
11	Jalisco	5,430	28	Puebla	4,338
12	Colima	5,324	29	Durango	4,327
13	Mexico	5,217	30	Zacatecas	3,824
14	Tamaulipas	5,191	31	Oaxaca	3,779
15	Campeche	5,037	32	Chiapas	3,058
16	Sonora	4,958			

Source: National Banking and Stock Commission. Financial Inclusion databases, June 2020.



## Mobile Banking

Innovation in financial services has the potential to foster simplicity and efficiency by establishing new processes in its infrastructure. According to the financial inclusion database of the National Banking and Securities Commission (CNBV for its Spanish abbreviation), as of June 2020, the total number of mobile banking agreements in the country was 46,353,702, of which 741,910 are from the state of Querétaro.

Agreements that use mobile banking, june 2020.	
Municipality	No. of contracts
Amealco de Bonfil	8,615
Pinal de Amoles	889
Arroyo Seco	537
Cadereyta de Montes	12,322
Colón	7,333
Corregidora	42,269
Ezequiel Montes	10,076
Huimilpan	2,915
Jalpan de Serra	5,244
Landa de Matamoros	756
El Marqués	33,781
Pedro Escobedo	9,623
Peñamiller	866
Querétaro	495,520
San Joaquín	664
San Juan del Río	92,159
Tequisquiapan	16,044
Tolimán	2,297
Total	741,910

Source: National Banking and Stock Commission. Financial Inclusion databases, June 2020.

## Development Banking directory in the state

It plays a fundamental role in the state since, through credit and investment, it serves as a lever for progress in infrastructure, export promotion and support to small and medium companies.

Directory of the Development Bank in the state of Querétaro.
<b>Banco del Bienestar</b>  Av. Corregidora Nte. 291, Centro, 76000 Santiago de Querétaro, Qro.   442 224 1727
<b>Banco Nacional de Obras y Servicios Públicos (BANOBRAS)</b>  Calle Privada Ignacio Zaragoza 279, Col. del Prado, 76030 Santiago de Querétaro, Qro.   442 215 3932
<b>Banco Nacional del Ejército, Fuerza Aérea y Armada (BANJERCITO)</b>  Plaza San Marcos 110, Col. Ensueño, Felipe Carrillo Puerto, 76178 Santiago de Querétaro, Qro.   442 215 9274
<b>Nacional Financiera (NAFIN) Center Region</b>  Insurgentes Sur, No. 1971, Torre 4 Piso 11, Col. Guadalupe Inn, Álvaro Obregón, 01020 Ciudad de México.   55 532 56000
<b>Banco Nacional de Comercio Exterior (BANCOMEXT) Regional Directorate Center</b>  Periférico Sur 4333, 3er. Piso Poniente, Col. Jardines en la Montaña, 14210 Ciudad de México.   55 5449-9284

Source: Ministry of Sustainable Development of the Executive Power of the State of Querétaro, with information from the websites of the Development Banking institutions.

## Mexican Financial System

The Mexican Financial System has as its highest administrative agency the Ministry of Finance and Public Credit and six other public institutions that are responsible for supervising and regulating the entities that integrate the system. These agencies are also responsible for protecting users of financial services through specific duties assigned to them by law:

- Ministry of Finance and Public Credit (SHCP).
- Bank of Mexico (BANXICO).
- National Banking and Securities Commission (CNBV).
- Insurance and Surety National Commission (CNSF).
- National Commission for the Retirement Savings System (CONSAR).
- National Commission for the Protection and Defense of Financial Services Users (CONDUSEF).
- Institute for the Protection of Bank Savings (IPAB).





### 6.3.3. Real estate services

Its main activity deals with real estate, both in leasing without intermediation and in intermediation in sale and lease operations. It provides real estate related services such as administration, valuation, promotion and consulting.

The sector contributed 15.4% of the total tertiary activities in 2019. This percentage represented an increase of 852.13 million pesos more compared to the previous year.

#### Registration of real estate agents and companies

The Law that regulates real estate agents and companies in the state of Querétaro, published in La Sombra de Arteaga on December 6, 2016, seeks to establish the basis for the certification and renewal of real estate agents and the creation of the registry of real estate agents and companies in the state. The following table shows the record of issued licenses and permits:

Year	Number of licenses granted to real estate agents	Number of permits granted to real estate companies
2017	157	6
2018	542	23
2019	507	5
2020	133	10

Source: Ministry of Urban Development and Public Works, 2021.

During 2020, training courses on urban development were given to 4 municipalities.

Municipalities	Hours
Pedro Escobedo	10
Tolimán	15
Arroyo Seco	15
Pinal de Amoles	5
Total	45

Source: Ministry of Urban Development and Public Works, 2021.





# 6.4. Commercial development and services

## 6.4.1. Employment in commercial and service sectors

During 2020 the great activity of the tertiary sector in the state was reflected in the number of workers insured by the Mexican Institute of Social Security (IMSS). The contribution was 51% of the total in December 2020.

Business, personal and household services include financial and insurance services (banks, finance companies, insurance companies, etc.); collateral to financial and insurance institutions; real estate, professional and technical services, rental services; except for real estate, temporary accommodation services, food and beverage preparation and service, recreational and leisure services, and personal household and various services.

The communal services are education, scientific research and cultural diffusion, medical services, social and veterinary assistance, commercial, professional, civic, political, labor and religious groups, public administration and social security services, and services of international organizations and other extraterritorial groups.

This sector represents 60% of the total employed population in the state with 529,847 people.

The following graph shows the percentages into which the commercial and services sector is divided, according to the record of insured workers:

Tertiary sector workers insured by the IMSS, december 2020.			
Economic activity	Insured workers	Annual variation	
Services for businesses, individuals and the home	119,121	-6.7%	17.8%
Commerce	98,035	3.4%	10.7%
Social and community services	53,967	1.9%	39.2%
Transport and communications	32,627	2.0%	
Total state of Querétaro	303,750	-1.2%	32.3%

Source: Ministry of Sustainable Development, with data from the Mexican Institute of Social Security (IMSS).

## 6.4.2. Gross Domestic Product (GDP) of the sector

Divided by economic activity, the tertiary sector contributes the most to Querétaro’s total GDP with 57.3%, followed by the secondary sector with 40.3% and lastly by the primary sector with the remaining 2.4%. At constant values the tertiary sector presents a variation of -0.1% in comparison to the previous year.

Gross Domestic Product of the tertiary sector in the state of Querétaro by subsector 2019.	
Subsector	GDP (millions of constant pesos)
Commerce	75,081.7
Transport, mail and storage	25,148.8
Information in mass media	15,178.9
Financial and insurance services	14,469.2
Real estate and rental services of movable and intangible property	35,623.3
services professionals, scientists and technicals	13,594.0
Corporate	253.8
Business support, waste management and remediation services	9,037.4
Educational services	12,232.0
Health and social assistance services	5,905.6
Cultural, sports, and other recreational entertainment services	611.3
Temporary accommodation and food and beverage preparation services	7,716.5
Other services except government activities	6,143.8
Government activities and international organizations	10,385.8
Total	231,382.10

Source: INEGI. System of National Accounts of Mexico, 2021.



# 6.5. Micro, small and medium-sized enterprises

According to statistics provided by the United Nations (UN), micro, small and medium enterprises (MSMEs) represent approximately 90% of the business sector worldwide. In Mexico they constitute 97.6% and concentrate 75.4% of employment.

Their role is particularly relevant in developing countries, where they promote employment and economic growth. World Bank statistics indicate that SMEs contribute with up to 45% of total formal employments and 33% of the national GDP in emerging economies.

The UN emphasizes that, among many other aspects, the importance of MSMEs for sustainable development lies in their ability to provide work to a large part of workers belonging to the most vulnerable sectors.

## National Context: 2019 Economic Census

According to the 2019 Economic Census, in Mexico there were 6,373,169 establishments, which represented an average increase of 2.4% per year. The majority of employed personnel works in the service sector with 37.5%, followed by commercial sector with 27.6% and manufacturing sector with 23.9%.

Mexico's economic structure is based on micro-enterprises, which represent 94.9% of the establishments; 4.9% correspond to small and medium enterprises.

It is important to emphasize that 37.2% of jobs are provided by micro-enterprises and 30.7% by small and medium enterprises, percentages that contrast with the 32.1% of employed personnel.

Regarding income, large establishments generate 54.7% and MSMEs generate the remaining percentage.

The census itself highlights that Querétaro is among the 10 entities that contribute the most to the nation's added value.

For its part, the INEGI's 2020 Business Demographics Study estimates that, of the 4.9 million micro, small and medium-sized establishments registered in the country in the 2019 Economic Censuses, 3.9 million (79.2%) survived, just over one million (20.8%) closed their doors permanently, and 619,443 establishments were created, representing 12.75% of the country's business population.

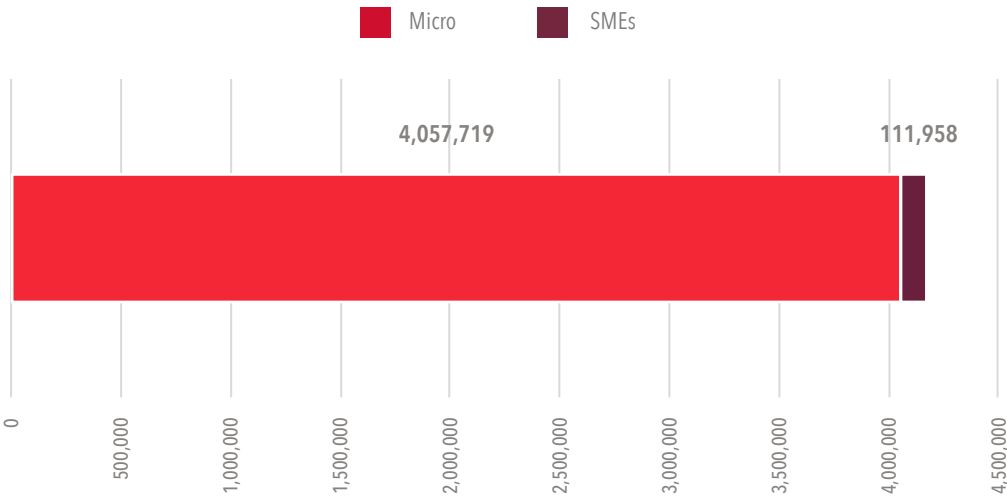
An initial population of 82,280 establishments was registered for the state, 18,467 permanent closures, 10,656 creations and a final population of 74 468. It ranked 20th place with the lowest closure rate.

## National Context: National Survey on Productivity and Competitiveness of Micro, Small and Medium Enterprises (ENAPROCE)

According to the National Survey on Productivity and Competitiveness of Micro, Small and Medium Enterprises (ENAPROCE for its Spanish acronym) prepared by the INEGI together with the Ministry of Economy (SE) and the Asociación Mexicana de Secretarios de Desarrollo Económico, A.C. (AMSDE), it is estimated that there are 4,169,677 MSMEs nationwide, which together employ 12,729,320 people.

The distribution of MSMEs in the country is as follows:

Enterprises nationwide and distribution of employed personnel by company size, 2017.



Source: National Institute of Statistics and Geography. National Survey on Productivity and Competitiveness of Micro, Small and Medium Enterprises (ENAPROCE) 2018.

The survey also reveals that 68.9% of MSMEs provide training to their personnel. Of these, 56.5% are micro-enterprises and 43.5% are small and medium enterprises. The average expenditure on training is 392.14 pesos per person, where the average expenditure for women is 152.86 pesos and for men is 239.28 pesos.



Classification criteria MSMEs

The criteria to classify MSMEs differs in each country. The number of workers is often used to classify companies by size and, as complementary parameters, total annual sales, income and fixed assets.

The companies are classified in 4 groups based on the number of employees according to the criteria of the Ministry of Economy in the Official Journal dated June 30, 2009. The following table exemplifies the information:

Stratification of companies in Mexico, according to the number of employees.			
Size	Sector		
	Industry	Commerce	Services
Micro	0 to 10	From 0 to 10	From 0 to 10
Small	From 11 to 50	From 11 to 30	From 11 to 50
Medium	From 51 to 250	From 31 to 100	From 51 to 100
Big	More than 250	More than 100	More than 100

Companies are also classified according to their generated income. Below are the considered stratification limits by company size.

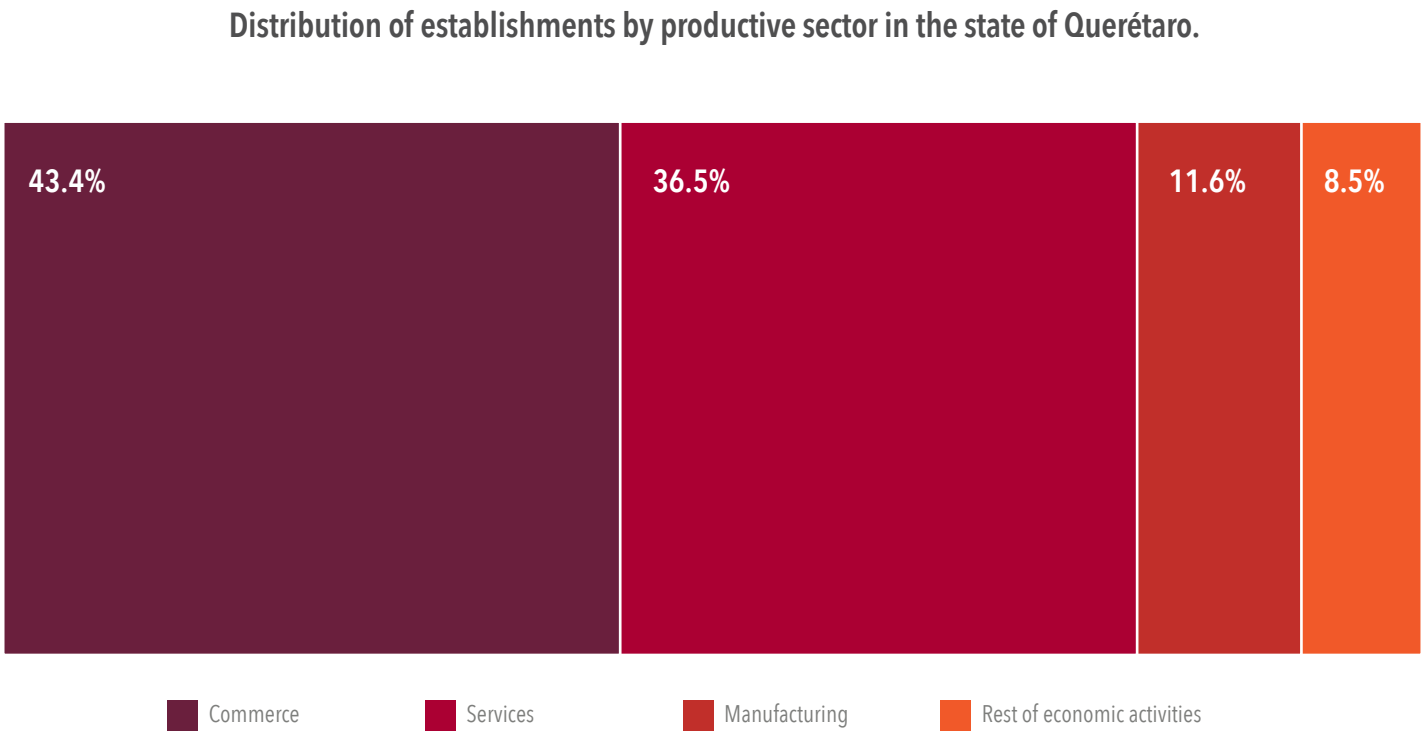
Stratification of companies in Mexico, according to income.			
Stratum	Ranges in thousands of pesos		
	Big	SMEs	Micro
1	More than 650,000	More than 60,850	More than 900
2	Between 200,001 to 650,000	Between 6,351 to 60,850	Between 91 to 900
3	Between 0 to 200,000	Between 0 to 6,350	Between 0 to 90

Source: National Institute of Statistics and Geography (INEGI). National Survey on Productivity and Competitiveness of Micro, Small and Medium Enterprises (ENAPROCE), 2018. Ministry of Economy. Official Journal of the Federation (DOF) June 30, 2009.

Establishments

In Querétaro, according to the INEGI's 2019 Economic Census, there were 115,532 establishments of which 92.6% were micro enterprises and 7.1% were SMEs. 853,477 people of the state's employed population are within this domain. The following graph shows the distribution according to the economic sector:

Micro-enterprises are more representative of the economic units in the state, with a volume of 92%.



Source: National Institute of Statistics and Geography. Economic Censuses 2019.





Economic Units

In Querétaro, according to data from the National Statistical Directory of Economic Units (DENUE for its Spanish abbreviation) of the INEGI, there are 94,585 economic units, 1.4% more than the registered units in 2019, 99.5% of which are MSMEs. 61.5% of the employed population in the state is in this universe, that is, 520,148 people.

Of the 94,585 economic units, 912 correspond to legislative, governmental, and judicial activities, as well as international and extraterritorial organizations.

The following graph demonstrates the distribution according to the economic sector:

Distribution of economic units by productive sector in the state of Querétaro.		
Activity	UE	Percentage
Services	43,708	46.2%
Commerce	40,899	43.2%
Manufacture	8,145	8.6%
Government activities	912	1.0%
Building	657	0.7%
Energy, water and gas	91	0.1%
Mining	120	0.1%
Primary sector	53	0.1%
Total	94,585	

Source: Ministry of Sustainable Development with information from the National Statistical Directory of Economic Units (DENUE) of INEGI, 2021.

Economic units in the state of Querétaro by size.		
Size	Economic units	Percentage distribution
Micro	85,839	91.6%
Small	6,141	6.6%
Medium	1,294	1.4%
Large	399	0.4%
Total	93,673	100.0%

Source: Ministry of Sustainable Development with information from the National Statistical Directory of Economic Units (DENUE) of INEGI, 2021.





# 6.6. Support and promotion of enterprises

## 6.6.1. Office of support for SMEs

This organization, which depends on the Ministry of Sustainable Development, has the following functions, among others:

- To promote projects and coordinate the necessary steps to incorporate MSMEs established and to be established in Querétaro to the support programs offered by the institutions and agencies of the state and federal government involved in the subject matter.
- To promote and facilitate resources for training and professionalization of micro, small and medium enterprises.
- To promote and coordinate fairs and forums for young entrepreneurs and design projects to support in generating their own companies.
- Promote the state's exports by participating in support programs for companies dedicated to this activity. To this end, it facilitates coordination with federal, state, municipal and international agencies and entities.
- Organize and coordinate the granting of awards to companies that are distinguished by their levels of competitiveness, quality, export and social responsibility.

In 2020, programs and events were held to promote the development of businesses in Querétaro through a variety of themes. The main purposes were the adoption of new technologies, the reactivation of their activities, and the strengthening and increase of their capacity to participate in foreign trade. These were the programs that were carried out:

### Competitiveness Program

It offers comprehensive attention to entrepreneurs, micro, small and medium enterprises to increase their productivity and competitiveness through support in training, consultancy and advice.

The program addresses issues such as: strategic planning, quality, sales and production; and provides support for certifications, procurement of advertising and marketing material, among others.

During 2020, 21 projects were promoted to improve competitiveness. Support was provided to 586 beneficiaries.

### Economic Promotion Program of the State of Querétaro (Guarantee Fund)

The purpose of this program is to facilitate the funding of MSMEs in strategic sectors of Querétaro through a scheme in which the government provides the guarantee to support the loan granted by banks to the company. During 2020, 135 loans were granted.

### Business Merit Award

Its purpose is to annually recognize those organizations, companies and institutions that have distinguished themselves throughout the year by fostering competitiveness, participation in foreign trade, corporate social responsibility, sustainability and environment, as well as research and technological development.

In 2019 the category of Sustainability and Environmental Responsibility was created, as well as the special recognition of Entrepreneur of the Year.

The following categories are documented year after year:

#### 1.- Competitiveness.

It acknowledges companies that have distinguished themselves by implementing strategies, systems and processes of total quality and continuous improvement to increase their competitiveness. The organization that coordinates this category is the National Chamber of the Transformation Industry (CANACINTRA for its Spanish acronym).

#### 2.- Foreign Trade.

It celebrates companies that promote the foreign trade of goods or services produced in the state or that support such activity. This division is organized by the Asociación de Industria de Exportación de Querétaro A.C (INDEX Querétaro).

#### 3.- Social Responsibility.

It is awarded to companies and institutions that have distinguished themselves by a sustainable operation and an ethical, social and environmental commitment. It is coordinated by the Instituto Tecnológico y de Estudios Superiores de Monterrey, Querétaro Campus.

#### 4.- Science and Technology.

Higher education institutions, research centers and companies in the state of Querétaro that distinguish themselves by investing in Research and Technological Development (IDT) participate. This category is coordinated by the Council of Science and Technology of the State of Querétaro (CONCYTEQ for its Spanish acronym).

#### 5.- Sustainability and Environmental Responsibility.

It recognizes those who, through their activities, distinguish themselves in the positive impact on the environment and projects focused on the conservation and use of the natural heritage of the state. It is coordinated by the Instituto Tecnológico y de Estudios Superiores de Monterrey, Querétaro Campus.









# 6.7. Directory of chambers and associations of the sector

Chambers and associations are official and public utility agencies, which operate independently of the various levels of government.

The following table provides data on chambers and associations related to the tertiary sector in Querétaro:

Directory of the chambers and associations of the state of Querétaro.

<b>AERI</b>   Asociación de Ejecutivos de Relaciones Industriales, A.C.	<b>AMIQRO</b>   Asociación de MiPyMES Industriales de Querétaro, A.C.	<b>AMPI QRO</b>   Asociación Mexicana de Profesionales Inmobiliarios del Estado de Querétaro, A.C.	<b>AQH</b>   Asociación Queretana de Hoteleros, A.C.
Av. Ignacio Zaragoza No. 279, despacho 313. Colonia Del Prado. Querétaro, Qro. C.P. 76039 442 166 7052 / 442 242 1273 www.aeri.com.mx	Calle Agustín Melgar No. 35. Colonia Niños Héroes. Querétaro, Qro. C.P. 76010 442 189 4602 www.amiqro.com	Calle Senda de la Inspiración No. 6, local 11. Colonia Milenio III. Querétaro, Qro. C.P. 76060 442 214 2494 www.ampiseccionqueretaro.com	www.aqh.org.mx
<b>CMIC QRO</b>   Cámara Mexicana de la Industria de la Construcción, Delegación Querétaro	<b>CANACOPE QRO</b>   Cámara Nacional de Comercio en Pequeño de Querétaro	<b>CANACO QRO</b>   Cámara Nacional de Comercio, Servicios y Turismo de Querétaro	<b>CNEC QRO</b>   Cámara Nacional de Empresas de Consultoría en Querétaro
Calle Río Yaqui No. 101. Colonia Lomas de San Pablo. Querétaro, Qro. C.P. 76125 442 220 6309 / 442 220 6375 www.cmicqro.org	Calzada de los Arcos No. 160. Colonia Loma Dorada. Querétaro, Qro. C.P. 76060 442 223 1271 www.canacope.mx	Av. Luis Vega y Monroy No. 405. Colonia Quinta Balaustradas. Querétaro, Qro. C.P. 76079 442 384 8417 www.concanaco.com.mx	Calle Juan Caballero y Osio No. 65. Colonia Pathé. Querétaro, Qro. C.P. 76020 442 455 9245 www.cnec.org.mx







Directory of the chambers and associations of the state of Querétaro.

**CANADEVI QRO** | Cámara Nacional de la Industria de Desarrollo y Promoción de Vivienda, Delegación Querétaro

Av. Paseo Constitución 301 Col. Arboledas Gamitos C.P. 76140, Querétaro, Qro.  
442 220 2286 ext.127  
www.canadevi.com.mx

**CANIRAC QRO** | Cámara Nacional de la Industria de Restaurantes y Alimentos Condimentados del Estado de Querétaro

Av. Luis Vega y Monroy No. 405. Colonia Quinta Balastradas. Querétaro, Qro. C.P. 76079  
442 228 3219  
www.caniracqueretaro.org

**CANACINTRA QRO** | Cámara Nacional de la Industria de la Transformación, Delegación Querétaro

Av. 5 de Febrero No. 308 Nte. Colonia Parque Industrial Jurica. Querétaro, Qro. C.P. 76120  
442 218 0358 / 442 218 0418  
www.canacintragro.org.mx

**CIQ** | Club de Industriales de Querétaro, A.C.

Calle Estadio No. 113. Fraccionamiento Colinas del Cimatario. Querétaro, Qro. C.P. 76090  
442 368 0300  
www.ciq.com.mx

Colegio de Corredores Públicos de la Plaza del Estado de Querétaro, A.C.

Av. Ignacio Zaragoza No. 330 Pte. Colonia Niños Héroes. Querétaro, Qro. C.P. 76010  
442 215 1825

**COPARMEX QRO** | Centro Empresarial del Estado de Querétaro, S.P.

Av. Fray Luis de León No. 1501. Fraccionamiento Centro Sur. Querétaro, Qro. C.P. 76090  
442 248 2150  
www.coparmexqro.org

**COMCE QRO** | Consejo Empresarial Mexicano de Comercio Exterior, Inversión y Tecnología, A.C.

Calle Fuente de Trevi No. 100, Col. Prados del Campestre. Querétaro, Qro. C.P. 76199  
442 242 2772  
www.comcequeretaro.org.mx

**FECAPEQ** | Federación de Colegios y Asociaciones de Profesionistas del Estado de Querétaro, A.C.

Calle Estadio No. 114. Fraccionamiento Centro Sur. Querétaro, Qro. C.P. 76069  
442 229 0619  
www.fecapeq.org.mx

**UGRQ** | Unión Ganadera Regional de Querétaro

Antiguo Camino a Mexico km 1.9 Col. Cumbres de Conin. El Marqués, Qro.  
442 277 4663  
www.ugrq.org.mx

SUSTAINABLE  
QUERÉTARO

INFRASTRUCTURE  
AND EQUIPMENT

QUALITY OF LIFE

PRIMARY SECTOR

SECONDARY SECTOR

TERTIARY SECTOR

TOURISM AND CULTURE

GOVERNMENT  
SERVICES

Source: Secretariat of Sustainable Development of the Executive Power, 2021.







The state of Querétaro has unparalleled cultural and historical richness. Its architecture, its production of handicrafts, the quality of its services and the hospitality of its people, along with the abundant natural resources of its environment, make it an exceptional tourist destination.

There are 6 pueblos mágicos, meaning "magical towns", in the state which reveal immense beauty and cultural richness through their stunning architecture and social diversity.

# TOURISM AND CULTURE

ECONOMIC IMPACT **12,187.33** MILLION PESOS

**2,520,716** TOURISTS RECEIVED FOREIGN TOURISTS **98,301**

**571** ACCOMODATION ESTABLISHMENTS **16,639** ROOMS

**8,612** FOOD AND BEVERAGE ESTABLISHMENTS TRAVEL AGENCIES **285**

**38** TOURIST TRANSPORTATION COMPANIES **38** CAR RENTAL COMPANIES TOURIST GUIDE **168** ESTABLISHMENTS

**4,726** HISTORIC MONUMENTS

**319** CULTURAL VENUES **64** CULTURE CENTERS **4** ARCHEOLOGICAL SITES

**49** MUSEUMS **28** GALLERIES

**20** THEATERS **37** AUDITORIUMS **85** LIBRARIES **36** BOOK STORES **3** PHOTO LIBRARIES



# 7.1. Tourism

## 7.1.1. Touristic development

Visiting places and regions outside of the everyday sphere allows for the enjoyment of numerous scenarios and different activities. This fosters a richer culture, it poses challenges and adventures, and it provides a unique source of recreation, rest and relaxation.

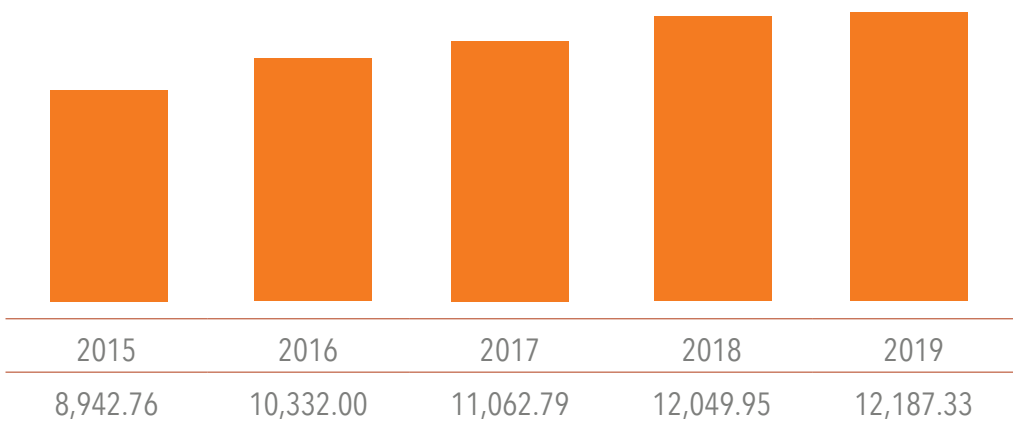
Not only does tourism bring satisfaction to individuals, families and groups, but it also comprises one of the main sources of economic and cultural development in a country or region. During the year 2020, tourism was one of the most affected economic fields as a consequence of the COVID-19 pandemic.

### Economic impact

In 2020, the federal Ministry of Tourism reported a nationwide influx of 51,160,265 foreign visitors. The revenue generated by this activity totaled 11,024.86 million dollars, a variation of -55.1% compared to the previous year.

Regarding average hotel occupancy, Querétaro has positioned itself as one of the most successful states in the country. According to information from the state Ministry of Tourism, the economic impact of the sector amounted to 12,187.33 million pesos in 2019, an increase of 1.14% from the economic impact of 2018.

Revenue from the tourism sector 2015 - 2019 in the state of Querétaro.  
(millions of pesos)



Source: Ministry of Tourism of the Government of the State of Querétaro.  
Note: It includes expenditure on accommodation, food, drinks, transportation and shopping.

### Destinations and tourist attractions

Querétaro is a state with architectural abundance; true delight comes from exploring its cities and towns with their multiple monuments, squares and buildings. These destinations also host numerous venues dedicated to art, as well as archaeological sites and wonderful nearby places offering ecotourism, among other activities.

Querétaro –the birthplace of Mexico’s Independence– has historical, cultural and touristic heritages that are second to none. Tequisquiapan hosts the Wine and Cheese Route and is an ideal place to appreciate the beauty of the Mexican countryside, whether on horseback or riding on a hot air balloon. Bernal, one of the six pueblos mágicos in the state, has the third largest monolith in the world: the Peña de Bernal.

Of course, it would be impossible not to mention the Sierra Gorda of Querétaro and its “magical towns” of San Joaquín and Jalpan, where the Franciscan missions attract religious tourism. The Sierra Gorda also stands out for being one of the natural protected areas in the country with the largest biodiversity, and a place where ecotourism is plentiful.







## Querétaro's Pueblos Mágicos

Pueblos mágicos are small towns that have preserved their architecture, their symbolic attributes, their legends, their history and important events throughout the years; in other words, they have conserved their socio-cultural heritage, which translates into a great opportunity for tourist activities. These small towns offer travel alternatives both for national and foreign visitors.

The state of Querétaro has six pueblos mágicos. In 2005, the delegation of Bernal, in the municipality of Ezequiel Montes, received the first appointment. In 2010 the municipality of Jalpan de Serra in the Sierra Gorda of Querétaro was honored; in 2011 and 2012 respectively, Cadereyta de Montes and Tequisquiapan joined in; in 2015 the municipality of San Joaquín had its turn; and, finally, in 2018, the municipality of Amealco de Bonfil received the title.

### • Bernal

The most distinguishing feature of this town is the rock formation called Peña de Bernal, considered the third largest in the world after the Peñón de Gibraltar in Spain and the Pão de Açúcar in Brazil. It is over 300 meters tall and only 59 km away from the city of Querétaro.

The monolith was formed 65 million years ago during the Jurassic period, when a volcanic chimney reduced its energy enough to make way for the lava coming from the interior of the volcano which, combined with climatic factors of the time, formed this natural wonder.

In addition to the Peña de Bernal, the town offers the following attractions: The Chapel of the Souls (Capilla de las Ánimas), The Church of St. Sebastian Martir (Templo de San Sebastián Mártir) and the Mask Museum (Museo de la Máscara).

### • Amealco de Bonfil

As well as in other towns, its name stems from the Nahuatl heritage, originating from the pre-Hispanic word Ameyalco, or Amellayi, meaning «place of water springs». Its distinctiveness lies mainly in its traditional gastronomic culture: carnitas (braised pork), barbacoa (mutton cooked following traditional methods), mole de guajolote (mole sauce made with wild turkey), pulque (an alcoholic drink obtained from the fermentation of agave juice) and aguamiel (agave water or juice) are the pride of locals.

The exquisite craftsmanship of its clay handicrafts, its pottery and its unique and famous handmade dolls, which have earned the title of Intangible Cultural Heritage of Querétaro, make Amealco –a gem that originated in 1538– another one of the pueblos mágicos of the state.

The Handmade Doll Museum (Museo de la Muñeca Artesanal), the old Church of St. Ildefonso Tultepec (Templo de San Ildefonso Tultepec), the former hacienda La Muralla, and the body of water called Laguna de Servín, are some of Amealco's top attractions, among others.







#### • Jalpan de Serra

This municipality is located to the north of the state of Querétaro, right in the heart of Querétaro's Sierra, a place where breathtaking views of the enormous topographic and ecological diversity of the area can be appreciated.

The word Jalpan comes from the Nahuatl expression meaning «place on the sand». This community emerged from the settlement of the Pame culture which was later evangelized by the Franciscan monks who built several missions in the area now considered World Heritage by UNESCO.

The Main Square, the Mission of Señor Santiago, the History Museum of the Sierra Gorda, and the Jalpan river, are some of Jalpan's main attractions, among others.

#### • Cadereyta de Montes

This town is located in the central part of Querétaro in the semidesert region of the state. Founded in 1640 on the remains of an ancient Chichimeca settlement as Villa de Cadereyta, its name was changed in 1902 to Cadereyta de Montes in honor of Ezequiel Montes.

The richness of its colonial architecture includes neoclassic and baroque buildings erected by the Franciscan order in the 18th century. Highlights include the Main Square, the botanical gardens -home to innumerable species which are typical flora from the semidesert of Querétaro-; the Parish of St. Peter and St. Paul (Parroquia de San Pedro y San Pablo); haciendas, churches and large colonial houses, among many other attractions.

#### • San Joaquín

Originally named Misión de San Nicolás de Tolentino in 1682, it obtained its current name, San Joaquín, until 1941. This municipality is particularly notorious for its traditional music the «trío huasteco», meaning Huasteco trio, which every April animates the annual celebration of the National Huapango Huasteco Contest.

The municipality is renowned around the world for its natural wonders among which the Campo Alegre National Park and its gorgeous waterfalls stand out; but also because of its cultural richness: the archaeological site of Ranas, the cave paintings, and the church of the Parish of San Joaquín (Parroquia de San Joaquín) being some of them.

#### • Tequisquiapan

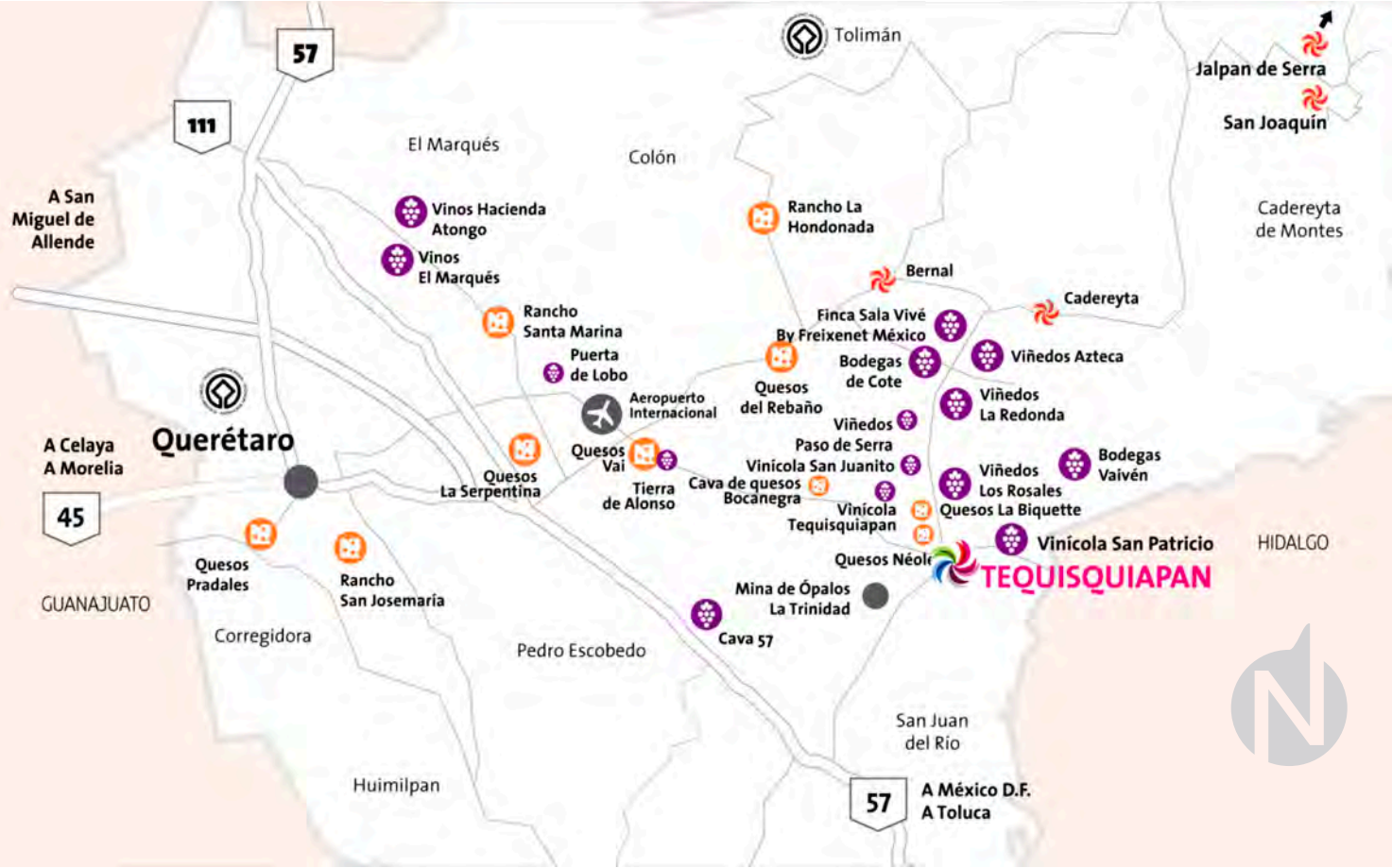
Just like Jalpan, this town founded in 1551 inherits its name from the Nahuatl language: Tequisquiapan – inspired by the trees growing next to the body of water that goes through it– means «place on the Tequesquite river».

Its pleasant mild climate is ideal for its numerous water parks and the recreational park La Pila. The town also hosts the Cheese and Wine Museum (Museo del Queso y el Vino), the Church of St. Mary of the Assumption (Templo de Santa María de la Asunción) and the Miguel Hidalgo square which, together with its restaurants, cafes and wealth of handicrafts offered, is the perfect setting to enjoy the magic and peacefulness of the place.





Art, Cheese and Wine Route.



Source: Cheese and Wine Fair (FNQV for its Spanish abbreviation). [www.feriadelquesoyvino.com.mx/qu%C3%A9-hacer-en-tequisquiapan/](http://www.feriadelquesoyvino.com.mx/qu%C3%A9-hacer-en-tequisquiapan/)

The Art, Cheese and Wine Route

This route reveals the efforts of different companies dedicated to the production of cheese and wine. The result is a wide-ranging variety of fresh and matured artisanal cheeses made from cow, goat or sheep milk; and also, of vines from which the best grapes are grown for the production of an extensive variety of wines such as sparkling, red, white and rosé, among others. The culture that revolves around the pleasure of producing and savoring these products, which stem from ancient traditions, is a true artistic expression that enriches the entity’s landscape.

The route passes through the municipalities of Tequisquiapan, El Marqués, Colón and Ezequiel Montes. The experience is complemented with restaurants, hotels, cafes, bars, handicraft markets and diverse tourist services that come together into a complete and unforgettable experience.

The close relationship between art, cheese and wine in this tourist route will delight and certainly satisfy the expectations of all family members: it will provide the opportunity to be in awe and to be captivated by the beauty of the historical and cultural heritage of these municipalities.





# 7.1.2. Hotel sector

The growth of tourism in Querétaro has become an investment and business development opportunity for this sector.

## Growth of the hotel sector

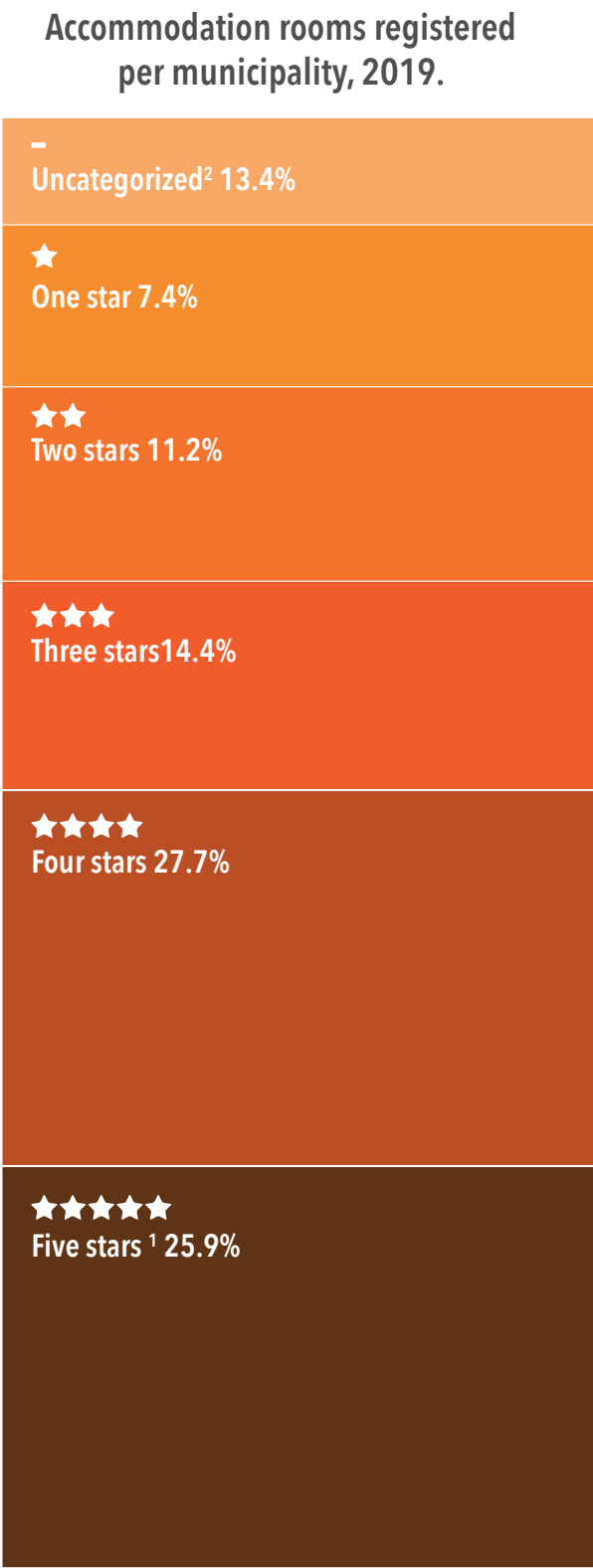
In 2019, the state Ministry of Tourism recorded a total of 571 accommodation establishments and 16,639 rooms. This represented an annual increase of 4% and 4.8% respectively.

## Hotel offer

From the 16,639 registered rooms in the state, 60.2% of them are in the municipality of Querétaro; 26.6% are distributed between El Marqués, Ezequiel Montes, San Juan del Río and Tequisquiapan; and the remaining 13.2% of them are distributed among the rest of the municipalities of the entity.

It is worth pointing out that out of more than 16 thousand rooms 25.9% of them belong to the five-star hotel category and 27.7% belong to the four-star hotel category.

The following is the distribution of the 16,639 rooms per municipality and accommodation category.



Accommodation rooms registered per municipality, 2019.		
Amealco De Bonfil	290	
Arroyo Seco	153	
Cadereyta De Montes	306	
Colón	65	
Corregidora	251	
El Marqués	579	
Ezequiel Montes	1,100	
Huimilpan	41	
Jalpan De Serra	498	
Landa De Matamoros	64	
Pedro Escobedo	65	
Peñamiller	75	
Pinal De Amoles	266	
Querétaro	10,010	
San Joaquín	105	
San Juan Del Río	1,474	
Tequisquiapan	1,275	
Tolimán	22	

Source: Ministry of Tourism of the Executive Power of the State of Querétaro.  
<sup>1</sup> Includes accommodation establishments ranked as Special Category and Luxury Hotels.  
<sup>2</sup> In reference to all those establishments that, given the type of accommodation services they offer, are not subject to a star ranking system.





### Hotel occupancy

During the year under study, the state recorded a total of 4,633,965 tourists per night where 55.8% of them stayed in the Municipality of Querétaro; 7.7% in San Juan del Río; 3.8% in Tequisquiapan; and 32.7% in the rest of the municipalities.

Tourist occupancy per touristic center distributed by establishment category, 2019.						
Municipality	5 stars *****	4 stars ****	3 stars ***	2 stars **	1 star *	Total
Querétaro	1,105,214	878,623	409,144	115,737	77,777	2,586,495
San Juan del Río	127,932	83,026	55,888	36,945	52,640	356,431
Tequisquiapan	39,277	46,171	39,763	43,442	7,819	176,472
Rest of state	133,386	501,632	288,803	344,629	246,117	1,514,567
State	1,405,809	1,509,452	793,598	540,753	384,353	4,633,965

Source: Ministry of Tourism of the Executive Power of the State of Querétaro. Data Tur System. <http://datatur.sectur.gob.mx>  
 \*Includes accommodation establishments ranked as Special Category and Luxury Hotels.



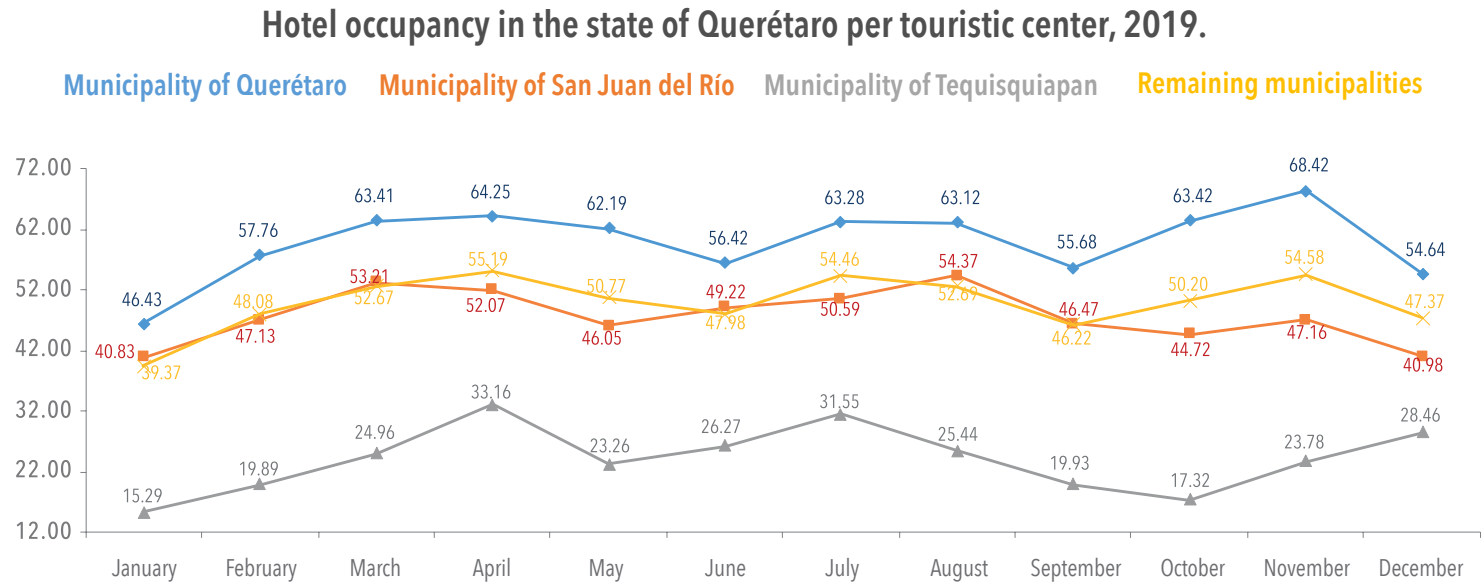




### 7.1.3. Tourist services

During 2019, the average stay in the state reached 1.7 nights per tourist and the hotel occupancy 45.4%. The municipality that sustained the highest hotel occupancy percentages throughout the year was Querétaro, with an average of 59.9%.

Querétaro stands out for its consolidation of the local tourism sector, even more so during the COVID-19 pandemic where the implementation of actions and sanitary protocols for the reactivation of tourism in the state have been fundamental.



**Source:** Secretary of Tourism of the State Government. Tourism Secretariat (SECTUR). Monitoring Data Tur, 2020.  
**Note:** In order to calculate the percentage of hotel occupancy and the average stay, both local and international tourists arriving to the state are taken into account.

### Tourist services offered

In addition to accommodation establishments, Querétaro offers a wide range of units that offer food and beverage services, travel agencies, tourist transportation, car rentals and tourist guide establishments. The following table details the information:

Touristic services in Querétaro, 2019.	
Touristic services	Quantity
Accommodation establishments	571
Number of rooms	16,639
Food and beverage service establishments <sup>1</sup>	8,612
Travel agencies	285
Tourist transportation	38
Car rental	38
Tourist guide establishments <sup>2</sup>	168

**Source:** Ministry of Tourism of the Executive Power of the State. National Statistics and Geography Institute. National Statistic Directory of Economic Units (DENU).  
<sup>1</sup>Includes restaurants, cafes, soda fountains, ice cream shops, refreshment shops and the like, nightclubs, discotheques and the like, bars, canteens and the like.  
<sup>2</sup>Number of tourist guides.

### Food and beverage service establishments

Querétaro has a large variety of establishments specializing in gastronomy. Among them, there are restaurants, fast food services, cafes and bars.

Half of these establishments or, more precisely, 51.6% are in the municipality of Querétaro, 13.6% are in San Juan del Río, and the rest is distributed among the other municipalities. From those establishments, 81.4% are restaurants that range from à la carte menus to takeaway or fast food.



# 7.2. Culture

## 7.2.1. Cultural infrastructure

The entity has a wide array of sites dedicated to cultural preservation and development. Most of them, 64.6%, are located in the metropolitan area of the city of Querétaro.

Among the 319 sites there are museums, theaters, book shops, libraries, cultural centers, galleries and auditoriums. Jointly, they foster and guarantee an effective access to culture.



### Museums

Both the federal Ministry of Culture and the Ministry of Culture of the state of Querétaro have a registry of 49 museums in the entity. The municipality where most of this type of infrastructure is concentrated is Querétaro, hosting 40.8% of it.

The following are highlights in the entity:

- Contemporary Art Museum of Querétaro (Museo de Arte Contemporáneo Querétaro)
- Site Museum of the Church of Santa Rosa de Viterbo (Museo de Sitio del Templo de Santa Rosa de Viterbo)
- Mineral Community Museum of San Joaquín (Museo Comunitario Mineral de San Joaquín)
- Misión de Bucareli Community Museum (Museo Comunitario Misión de Bucareli)
- Art Museum of Querétaro (Museo de Arte de Querétaro)
- Museum of the Restoration of the Republic (Museo de la Restauración de la República)
- Museum of the Archaeological Site El Cerrito (Museo de Sitio de la Zona Arqueológica El Cerrito)
- House of the Zacatecana Museum (Museo Casa de la Zacatecana)
- Cerro de las Campanas Museum and Maximiliano's Chapel (Museo del Cerro de las Campanas y Capilla de Maximiliano)
- Historic Museum of the Sierra Gorda of Querétaro (Museo Histórico de la Sierra Gorda de Querétaro)
- Regional Museum of Querétaro (Museo Regional de Querétaro)



### Theaters

Out of the 20 theaters registered in the entity, the municipality of Querétaro concentrates 80% of them; Jalpan de Serra, Pedro Escobedo, San Juan del Río and Tequisquiapan host the remaining 20%, with one venue each.

Some of the best known are:

- Theater of the Republic (Teatro de la República)
- Theater of the City of Querétaro (Teatro de la Ciudad de Querétaro)
- Cinema-theater Rosalío Solano (Cineteatro Rosalío Solano)
- Comedy theater Cómicos de la Legua (Cómicos de la Legua)
- Metropolitan Theatre (Teatro Metropolitano)
- Comedy theater Teatrillo La Carcajada (Teatrillo La Carcajada)
- Open air theater La Mantarraya (Teatro al aire libre La Mantarraya)
- Comedy theater El Corral de Comedias (El Corral de Comedias)





## Book shops

There are 36 book shops and sale points registered in the state. The municipality of Querétaro has 32 of them, while Jalpan de Serra and San Juan del Río have two each.

## Libraries

Both the federal Ministry of Culture and the Ministry of Culture of the state of Querétaro have a registry of 66 public venues affiliated to the National Library Network which are distributed among the 18 municipalities.

Querétaro is the leading municipality in the list with the highest number of registries, followed by Pedro Escobedo, San Juan del Río, Amealco, San Joaquín and Tequisquiapan.

Additionally, there is a registry of 19 private libraries which belong mainly to educational institutions.

## Cultural centers

The state has 64 cultural centers: Querétaro concentrates 34.4% of them, followed by Corregidora and El Marqués with 14.1% and 12.5% respectively. It is important to point out that all the municipalities in the entity have sites dedicated to cultural development.

The spaces designated to this activity are divided into public and private. The public spaces consist of municipal culture houses and community centers for development.

## Galleries

Out of a total of 28 galleries located in the state, 26 of them (93%) are concentrated in the municipality of Querétaro, and the remaining two can be found in Tequisquiapan and San Juan del Río.

## Auditoriums

Both the federal Ministry of Culture and the Ministry of Culture of the state of Querétaro have a registry of 37 private and public auditoriums within the entity. The municipalities that have these types of venues are: Querétaro, Jalpan de Serra, San Juan del Río, El Marqués, Pedro Escobedo and Tequisquiapan.



## 7.2.2. Cultural Heritage

The state of Querétaro has a wealth of cultural heritage. It is integrated by a large group of tangible and intangible assets, public spaces, archaeological sites, monuments, and a myriad of priceless elements.

Cultural heritage of the state of Querétaro registered in the National Council for Culture and Arts, 2019.						
Municipality	World Heritage	UNESCO declaration	Archaeological sites	Historic monuments INAH	Photo libraries	Railway heritage
Amealco de Bonfil	0	0	0	262	0	0
Pinal de Amoles	0	0	0	52	0	0
Arroyo Seco	1	0	0	46	0	0
Cadereyta de Montes	0	1	1	254	0	0
Colón	0	1	0	80	0	0
Corregidora	0	0	1	131	0	0
Ezequiel Montes	0	1	0	118	0	0
Huimilpan	0	0	0	46	0	0
Jalpan de Serra	1	0	1	79	0	0
Landa de Matamoros	1	0	0	39	0	0
El Marqués	1	0	0	119	0	0
Pedro Escobedo	0	0	0	73	0	0
Peñamiller	0	0	0	61	0	0
Querétaro	2	0	0	2,137	3	3
San Joaquín	0	0	1	55	0	0
San Juan del Río	1	0	0	673	0	0
Tequisquiapan	0	0	0	123	0	2
Tolimán	0	1	0	378	0	0
Total	7	4	4	4,726	3	5

Source: Ministry of Culture of the Executive Power of the State, 2021.



### • World heritage

The World Heritage List of the United Nations Educational, Scientific and Cultural Organization (UNESCO) registers the monuments and sites which, given their great natural and cultural richness, are considered the property of all mankind. The 1,121 sites on this list become a symbol of the places where they are located, and they also transmit its history and cultural identity to future generations.

Mexico has 35 sites that are registered in the World Heritage List of the UNESCO, out of which 6 of them are natural, 27 of them are cultural and 2 of them are mixed sites. Among them, the Franciscan missions of the Sierra Gorda of Querétaro, the Area of Historic Monuments of Querétaro and El Camino Real de Tierra Adentro, meaning The “Royal Road to the Interior Land”, can be found.





## • Archaeological sites

There are four archaeological sites in the state of Querétaro which are registered in the federal Cultural Information System of the Ministry of Culture: El Cerrito, in the municipality of Corregidora; Ranas, in San Joaquín; Tancama, in Jalpan de Serra; and Toluquilla, in Cadereyta de Montes.

**El Cerrito**, also known as the Pueblito Pyramid (Pirámide del Pueblito), is located in the municipality of Corregidora, within the metropolitan area of Querétaro. Throughout its history it has been given several different names; the one it currently holds comes from the resemblance of its base and main structure to a naturally-formed protrusion that looks like a small hill. This physical attribute derives from the deterioration and erosion of its panels, and from the vegetation growing on its surface.

**Ranas** is located 154 km northeast of the city of Querétaro. This archaeological site, together with Toluquilla, are jointly the most important manifestations of the Serrana cultural expression, which extends throughout the southern region of the Sierra Gorda. These two cities, located on hills and plateaus, controlled the populations located in their vicinity as well as the rich mineral deposits.

**Tancama** is located in the heart of the Sierra Gorda, just a few minutes away from the municipal capital Jalpan de Serra. Its name means «hill of fire» in the Huasteca language. During the winter solstice, and according to the sun, the site is aligned with the top of Cerro Alto, an artificial hill created in the pre-Hispanic era to emulate a neighboring mountain. It is made up of three squares set at different levels; there are several buildings distributed on two of them which were named after the objects found during the excavations of the site and after specific architectural characteristics. There is an 18-meter-long ball game in this archaeological site, which differentiates it as one of the smallest in the country.

**Toluquilla** is located approximately 110 km northeast of San Juan del Río. It is a settlement of 120 buildings, built on a plateau whose surface was modified in order to enable the construction areas. Its state of conservation is exceptional; the details of stairways, alleys, streets, doorways and walls over 2 meters high can be appreciated. The urban layout of the place is worth mentioning since it revolves around four ball games that articulate the central space from where the organization of the whole site springs.



• *Historic monuments*

There are 4,726 historic monuments in Querétaro; the National Institute of Anthropology and History (INAH for its Spanish abbreviation) is in charge of their surveillance, conservation and restoration. The collection consists of churches, parishes, cloisters, fountains and other buildings which are representative of the state. These include: the Aqueduct, the Alameda Hidalgo public park, the Chapel of Maximiliano de Habsburgo, the Casa de la Corregidora building, the Casa de la Marquesa hotel, the Jardin Guerrero public square, the Jardín Zenea public square, the Palacio Legislativo building, the Plaza de Armas square, the Theater of the Republic (Teatro de la República) and the Church of St. Francis (Templo de San Francisco).

• *Photo libraries.*

The Ministry of Culture of the Government of the Republic and the Ministry of Culture of the state of Querétaro confirm there are three photo libraries located in the Historic Center of the capital: the Historical Archive of the state of Querétaro, with a collection of over 1,500 pieces; the Photo Library of the INAH Center Querétaro; and the Centro Queretano de la Imagen (Querétaro’s Image Center).

• *Intangible cultural heritage*

The UNESCO also seeks to safeguard intangible cultural heritage. This includes the acknowledgement of the uses, representations, expressions, knowledge and techniques that have been transmitted from generation to generation and that deserve to be looked after in order to be preserved. These are practices and customs that instill identity and continuity in communities and groups, and foster respect for cultural diversity and human creativity.

The intangible cultural heritage is mainly found in the following spheres: traditions and oral expressions, the performing arts, social customs, rituals and festive events, knowledge and uses related to nature and the universe and, lastly, traditional ancestral techniques.

There are currently 549 elements in the intangible cultural heritage lists. Mexico has eleven cultural expressions registered in the Representative List of the Intangible Cultural World Heritage. Together with Colombia, they are the two countries in Latin America with the largest number of acknowledged elements.

Out of the eleven Mexican cultural expressions, one of them became part of the cultural heritage of the state of Querétaro since 2009, and it is called «Places of memory and living traditions of the Otomí-Chichimecas of Tolimán. The Peña de Bernal, guardian of a sacred territory».

• *Railway heritage*

There are five railway stations within the entity registered with the INAH that constitute the railway heritage: Bernal, Hércules, La Noria, Querétaro and San Nicolás.

The station in Querétaro was part of both the old Central Railroad and the Mexican National Railroad, and at the time it covered the route from Mexico to Querétaro. The rest of the stations were built on the trunk line of the old Mexican National Railroad from Mexico to Laredo.







### 7.2.3. Cultural identity

Cultural identity is integrated by all the elements that allow for the identification, characterization and demonstration of the features that a social group has in common, and of that which differentiates it from other settlements.

Even though Querétaro is one of the smallest territories in the country, it is one of the most heterogeneous states. The peculiar cultural identity of the region makes it a fascinating, colorful and diverse entity which offers the rest of Mexico, and the whole world, beautiful and exquisite handicrafts, unique traditional music, diverse and unparalleled gastronomy, and unmatched traditional feasts and festivities.

#### • Handicrafts

The extensive variety of handicrafts made in the towns and communities of Querétaro is one of its main attractions: fine embroidery, multi-colored opals embedded in splendid pieces created by goldsmiths, wool garments, objects made from sauz branches, ixtle and sabino root, palm-woven baskets, quarry sculptures, saddlery and clay ceramics. All of them are part of the wide array of possibilities offered by the skillful hands of the artisans of Querétaro.

Querétaro has the Casa Queretana de las Artesanías, meaning «Handicraft House of Querétaro», whose purpose is to foster the economic, social, individual, regional and community development of the artisan trade so as to incorporate it to the entity's economy, improving the quality of life of artisans in Querétaro through initiatives that are focused on promoting, marketing and commercializing their products.

#### • Commercialization of handcrafted products

With the aim of offering a commercial space to the artisans of Querétaro, the Casa Queretana de las Artesanías has two sale points in addition to its main unit: one in Tequisquiapan and another one in the International Airport of Querétaro; additionally, handcrafted products are commercialized at the Fiesta Inn Express Hotel in Plaza La Victoria. All 4 spaces are strategically located in order to cater to the local community, as well as both to national and international tourists. Sales reported during the period amount to 2 million pesos.



#### • Preservation of the Crafting traditions

The Casa Queretana de las Artesanías offers productive projects to artisans so they can obtain economic resources from the creation of articles that are commercialized within their facilities. There were 39 artisans on board, creating 71 projects for a total revenue of 50,000 pesos.







Con el objetivo de fomentar la creatividad y el mejoramiento en los acabados, técnicas y materiales; así como la difusión y venta de sarapes realizados con técnicas artesanales en el país, la Secretaría de Cultura, la Secretaría de Bienestar, el Fondo Nacional para el Fomento de las Artesanías (Fonart), en colaboración con el Estado de Querétaro, por medio de la Secretaría de Desarrollo Sustentable, la Casa Queretana de las Artesanías y el Municipio de Colón convocan al:

**1. DIRIGIDO A:**  
Artesanos mexicanos mayores de 18 años que se dediquen a la elaboración de sarapes artesanales en telar de pedal.

**2. CATEGORÍAS DE PARTICIPACIÓN:**

- a. Sarape o quexquemetl Tradicional
- b. Sarape o quexquemetl con tintes naturales
- c. Sarape o quexquemetl bordado

**3. PIEZAS CONCURSANTES:**  
Las piezas concursantes deberán tener las siguientes características:

- a. De elaboración reciente, que no hayan participado en otro certamen y con temática de la **Cultura Nacional**.
- b. Una pieza por artesano concursante, en caso de que varios elementos formen un juego se considerará una pieza.
- c. Con diseño, técnicas y materiales tradicionales; nuevo diseño con elementos, técnicas y materiales de grupos etnolingüísticos.

**4. REGISTRO DE PIEZAS:**  
Del 19 de octubre al 23 de noviembre de 2020, de 09:00 a 15:30 horas, en Secretaría de Desarrollo Sustentable Municipal, ubicado en Carretera Estatal 110, Ajuchitlán Colón km 9+200, Fraccionamiento los Naranjos, Colón, Querétaro, C.P. 76270. Tel. 419-113-22-33.  
Del 19 de octubre al 20 de noviembre de 2020, de 10:00 a 17:00 horas, en las Oficinas de la Casa Queretana de las Artesanías, ubicada en Andador Libertador 52, Centro Histórico, Santiago de Querétaro, Qro. Tel. 442-224-34-56

**5. DOCUMENTACIÓN:**  
a) Copia de identificación oficial (credencial de elector, pasaporte o cédula profesional); si la identificación no cuenta con la CURP se deberá agregar una copia de la CURP.

**6. CALIFICACIÓN:**  
Se llevará a cabo el día 24 de noviembre de 2020 a las 11:00 horas, a puerta cerrada, únicamente estará el jurado calificador conformado por especialistas en arte popular y artesanías designados por los organizadores, así como personal del Fonart y Casa Queretana de las Artesanías, quienes serán los que levanten el acta de calificación. El fallo será inapelable.

**7. PREMIACIÓN:**  
Los organizadores notificarán a los ganadores para que asistan a la ceremonia de premiación que se llevará a cabo el 30 de noviembre de 2020 en el Museo del Sarape, a un costado de la explanada de la Basílica de Nuestra Señora de la Virgen de los Dolores de Soriano en Colón, Querétaro con los siguientes:

	Primer Lugar	Segundo Lugar	Tercer Lugar
<b>Categoría A</b>	\$ 30,000.00	\$ 20,000.00	\$ 15,000.00
<b>Categoría B</b>	\$ 30,000.00	\$ 20,000.00	\$ 15,000.00
<b>Categoría C</b>	\$ 30,000.00	\$ 20,000.00	\$ 15,000.00

**10 Menciones Honoríficas \$ 5,500.00**

**8. EXPO-VENTA:**  
Por motivo de la pandemia de Covid-19, en esta edición no se podrá realizar la expo-venta con el objeto de evitar la concentración de personas y prevenir contagios.

**9. DEVOLUCIÓN DE LAS PIEZAS:**  
Acabada la premiación, el 30 de noviembre de 2020 a las 15:00 horas los artesanos podrán recoger sus piezas o el dinero producto de la venta de la misma, según sea el caso; para realizar este trámite deberán presentar copia del registro e identificación oficial.

**10. DESCALIFICACIÓN:**  
Cuando un artesano presente una pieza que incumpla la presente convocatoria será descalificado; cuando se ponga en duda la autoría de la pieza se podrá pedir al artesano que presente a los organizadores del certamen las pruebas necesarias para acreditar de manera plena y fehaciente ser el creador de la misma, a más tardar un día antes de la calificación; en caso de que sea nefestado que una pieza no cumpla con los criterios de calificación se podrá hacer hasta un día antes de la premiación.

**11. CASOS NO PREVISTOS:**  
Los casos no previstos serán resueltos por los organizadores del certamen.

Facebook @Fonart\_Artesanias Mexicanas | Casa-Queretana-de-Las-Artesanias | MunicipioColón

Twitter @fonart\_mx | @CasaArtQro | MpioColón

\*Este programa es público, ajeno a cualquier partido político. Queda prohibido el uso para fines distintos a los establecidos en el programa\*.



• **Contests**

Within the sphere of the Collaboration Agreement entered into by the Ministry of Sustainable Development and the Casa Queretana de las Artesanías with the National Fund for the Promotion of Handicrafts (FONART for its Spanish acronym), there were five contests:

Handicraft contests of the Casa Queretana de las Artesanías, 2020.			
Name of the contest	Participants	Prizes handed	Aggregate Prize Sum
1º Local palo cuchara contest	19	6	\$15,000.00
XXI Quarry, Embroidery, Shredding and Weaving Contest	110	24	\$100,000.00
State Handicraft Prize	164	21	\$300,000.00
National Hand-crafted Dolls Contest	175	19	\$350,000.00
National Sarape Contest	82	20	\$300,000.00

Source: Ministry of Sustainable Development, with information from the Casa Queretana de las Artesanías, 2021.





• Training

It is crucial to maintain a continuous training program aimed at developing skills in order to improve the productive and commercial conditions of artisans. This allows for a larger and superior production, organization and for a better use of raw materials, reducing production costs and tax obligations.

Training also helps prevent diseases and contributes towards a better health condition. In 2020, a total of 128 artisans were trained, with an investment that amounted to 29,000 pesos, thanks to the Casa Queretana de las Artesanías.

Through FONART, and managed by the Casa Queretana de las Artesanías, training courses were taught on subjects like the crafting of ixtle bags with natural dyes and the crafting of face masks with handcrafted embroidery. During this period 2 artisan workshops were benefited with a federal investment of 20,000 pesos.

In total, 10 courses were taught with an investment of 49,000 pesos, benefiting 158 artisans and, additionally, the FONART gave 2 family workshops with an investment of \$20,000 pesos.

Training of the artisans of the state of Querétaro, 2020.			
Course type	Course	Participating artisans	Investment
Own resources	Tatting	24	\$7,000.00
Own resources	Waist loom	15	\$6,000.00
Own resources	Waist loom	15	\$6,000.00
Own resources	Crafting of face masks	14	-
Own resources	Improvement in clay	15	\$10,000.00
Own resources	Bobbin lace course	15	-
Own resources	Bobbin lace course	15	-
Own resources	Bobbin lace course	15	-
FONART	Crafting of ixtle bags with natural dyes	10	\$10,000.00
FONART	Crafting of face masks with handcrafted embroidery	10	\$10,000.00

Source: Ministry of Sustainable Development, with information from the Casa Queretana de las Artesanías, 2021.

• Fairs and exhibitions

The Casa Queretana de las Artesanías, in collaboration with municipal, state and federal agencies, has searched for spaces where artisans can commercialize their products firsthand in fairs and exhibitions, both in Querétaro and in other states. This has yielded benefits to 19 artisans and resulted in 345,000 in direct sales.

• Handcrafted production

Through the «Promotion of Handcrafted Production» program, 31 artisans obtained economic resources amounting to 237,000 pesos directly.

• Actions of the Casa Queretana de las Artesanías to face the COVID-19 pandemic

With the end goal of giving artisans the tools they needed to operate their workshops during the COVID-19 pandemic, 8 social training talks were conducted where 186 artisans participated and, where they jointly designed focused plans and actions by workshop, considering transfers, raw materials, among other elements that, according to the epidemiological indicator allowed them to continue producing and commercializing their products.

During the first months of the pandemic, artisans from Amealco de Bonfil crafted face masks with handcrafted embroidery, which is why this organization designed a program to source raw materials for their production. With an investment from the Casa Queretana, which amounted to 150,000 pesos, 75 artisans, who crafted and commercialized 2,550 pieces, were benefitted.

Additionally, aiming to complete the productive chain, in the second semester of 2020 this organization acquired or commercialized almost 100,000 pesos in face masks of different styles to improve the artisans’ incomes during the most challenging economic moments.

In the framework of the collaboration agreement with the National Fund for the Promotion of Handicrafts, the delivery of 45 ophthalmic lenses for the same number of artisans was coordinated, as well as the delivery of 15 hygiene kits for workshops in the Municipality of Colón. The total investment was of 80,000 pesos.





## • *Gastronomy*

Querétaro's traditional gastronomy is related to its geographical regions and varies according to the different ecological niches and the customs of the groups that inhabited those areas. There are three kinds which can be noticeably identified: the one from the valleys, around the central and southeastern part of the state; the one from the Sierra Gorda, and the one from the Semidesert of Querétaro.

There are culinary traditions still kept in the valley area which originated in the old ranches and haciendas; the pig farms from the area led to the production of the famous carnitas (braised pork) and the chicharrón (fried pork skin). The area is also renowned for its production of several cheeses and barbacoa (mutton cooked following traditional methods).

The Sierra Gorda offers a broad selection of dishes in which the recipes, flavors and native and mestizo traditions are mixed. Dried meats, cheeses, atole de teja (thickened hot beverage made from corn) made with sunflower seeds and the famous zacahuil, a tamal (traditional dish made of dough) filled with pork, chicken or wild turkey meat, and stewed with a variety of dried chilies, are some of the dishes that can be enjoyed.

The Semidesert of Querétaro, a particularly arid region, offers natural ingredients such as cacti and insects, both of which are representative elements of its exotic cuisine.

Today, Querétaro has become a cosmopolitan city. This is why gourmet cuisine has acquired an increasing importance and has detonated the opening of numerous gastronomy schools that offer professional training for the new generations of culinary talents.

Haute cuisine has also driven a wine culture. With it, the vineyards in Querétaro have been developed and strengthened, favoring the establishment of businesses dedicated to the production of high-quality handmade culinary products.



## • *Music*

Querétaro has a wide array of musical rhythms and traditions. Some of them are the multiple melodic expressions from those regions of the state with origin in Otomí settlements: to the south of the municipality of Amealco de Bonfil and in the Central Semidesert. Autochthonous expressions are commonly interpreted by musical trios integrated by two flutes or two violins and a drum, and they are guaranteed to be played in community celebrations which are almost always linked to the predominant religion. In the Otomí area of Tolimán, there is a variation called viñuetes that is played with two different types of drums and a violin.

In the Sierra Gorda and the Central Semidesert the predominant cultural expression is the huapango. The rhythm of the instruments, the colorful costumes and the magnificence of the customs that are characteristic of the huapango make it one of the most beautiful traditions of the country and the Mexican culture. The music and the tapping of the dancers' shoes bind the different identities and customs that coexist in the Huasteca region together. The huapango is played in the states of Hidalgo, Oaxaca, Querétaro, San Luis Potosí, Tamaulipas and Veracruz.

In the city of Querétaro, one particular cultural expression from the pre-Hispanic era can be highlighted: the one associated with the Dance of the Concheros. In this tradition, two of the instruments used, the huéhuetl and the teponaxtle, are made from the shell of an armadillo. Additionally, there are rattles and accessories called «friar bones» that are made from large seeds and that produce a sound effect similar to that of a sleigh bell. These instruments are used by the dancers as part of their attire.



• *Traditional feasts and festivities*

Traditional feasts and festivities are a reflection of the identity of the peoples and communities that celebrate them. The culture can almost be grasped through them since they are a clear expression of the voices of the social fabric they represent.

Ever since pre-Columbian times, traditional feasts and festivities have been a distinctive hallmark and a fundamental part of the Mexican culture. Most of them originate from the religious beliefs of the social groups that celebrate them, they reflect the historical identity of Mexico, they keep its past alive and they strengthen its identity.

Given they are a characteristic of the national culture, there is no place in the country that lacks a celebration dedicated to a religious symbol or tradition. And Querétaro is no exception. There are traditional feasts and festivities celebrated in all 18 municipalities that integrate the territorial demarcation, and they set each region, and even each district, apart.

Querétaro also has a wide offer of activities that combine its historic heritage, its cultural identity, and its artistic offer. Its inhabitants and visitors can enjoy its many fairs, festivals and events.





# 7.2.4. Cultural and artistic offer

Throughout Mexico’s history, Querétaro has been a leading actor. It is a state that provides its inhabitants with multiple options for artistic development, appreciation of the fine arts, leisure and family moments.

The high quality and the variety of its cultural and artistic offer, together with its tourist attractions, make the entity a unique place for both visitors and residents.



## Cultural and artistic education

According to information from the Cultural Information System of the Government of Mexico, Querétaro has 22 cultural and artistic education centers, among which 86.4% of them are located in the municipality of Querétaro, and 9.1% of them in San Juan del Río.

These spaces offer educational options ranging from high school diplomas, bachelor’s degrees and programs for instructors who wish to obtain an official certification, to classes and workshops that encourage artistic learning and recreation.

The cultural and artistic education centers offer a wide array of disciplines: in the arts pertaining to body expression there is classic, folkloric, contemporary, aerial and Spanish dance; in the plastic arts, painting, drawing, sculpture, engraving and architecture are the most important; in the music genre, classical, folkloric, contemporary and flamenco music are cultivated; in visual arts, digital technique, photography and video art are promoted. Literature, poetry, histrionic arts such as theatre, stage and travelling performances, as well as cinematographic art also proliferate.

Cultural and artistic education centers in Querétaro registered in the Cultural Information System 2020.

Municipality	Centers
Corregidora	Universidad TecMilenio, Campus Querétaro
	Centro de las Artes de Querétaro
	Universidad del Desarrollo Profesional (UNIDEP), Plantel Querétaro
	Centro Nacional de Danza Contemporánea
	Escuela Activa de Fotografía Querétaro
	Universidad Cuauhtémoc, Plantel Querétaro
	Felva Mosso Tecnológico Universitario de la Moda
	Centro de Danza y Arte Proart
	Centro de Educación Artística Ignacio Mariano de las Casas (CEDART)
	Universidad de León, Plantel Querétaro
	Universidad Univer, Plantel Querétaro
	Escuela de Laudería
	Facultad de Bellas Artes (UAQ)
	Universidad Marista de Querétaro, A. C.
	Universidad Contemporánea
Querétaro	Centro Universitario Andamaxei
	Universidad Anáhuac, Querétaro
	Escuela-Compañía de Ballet del Consejo Académico de Arte y Danza Internacional
	Centro Estatal de Formación Artística y Cultural (CEFAC)
	Escuela de Iniciación Artística Asociada a Casa de Cultura Bicentenario
San Juan del Río	Universidad Mesoamericana, Plantel San Juan, S. C.
	Facultad de Bellas Artes, Campus San Juan del Río

Source: Ministry of Culture of the Government of the Republic, with information from the Cultural Information System (SIC), 2021.



Actions of the Ministry of Culture to face the COVID-19 pandemic

From the beginning of the COVID-19 pandemic, cultural activity received support and strengthening through digital means. Actions in benefit of the artistic and cultural community of Querétaro were conducted through the creation of a virtual cultural agenda in which a diverse and wide cultural offer was transmitted remotely to the inhabitants of Querétaro with an impact of 14,714,072 views.

There were artistic and cultural activities in which the Music Band of the State of Querétaro, the Philharmonic Orchestra of the State of Querétaro, museum and gallery personnel from the state administration, volunteer and hired artists participated with the objective of developing, through virtual means, conferences, concerts, workshops, theater presentations, handicrafts and traditional gastronomy. Likewise, the courses of the network of community orchestras were given continuity.

These actions accomplished the participation of local, national and foreign artists in the diverse transmissions of the cultural offer transmitted through the official social networks of the Ministry of Culture during the period of the public health contingency.

Also, there were virtual editions of the 2020 International Festival of Summer Jazz, the Meeting Point with Art and Tradition from the Semidesert and Sierra Gorda Festival, which had the participation of artists from the municipalities of Arroyo Seco, Jalpan de Serra, Landa de Matamoros, Pinal de Amoles, San Joaquín, Peñamiller and Tolimán.



14,714,072 views









## Government Services

The current administration conducts itself with strict adherence to Querétaro's 2016-2021 State Development Plan and the fifth guiding principle Querétaro with Good Government. Based on these guidelines, it has the goal to improve the living conditions of the population, providing high quality government services in accordance with the economic, human and social dynamics of Querétaro.

The public administration must be an effective and reliable facilitator of the means needed to achieve an optimal, comprehensive and equitable human development. This requires an efficient, effective, transparent and austere management.

This chapter provides information regarding the three powers of the State, government efficiency, and federal and municipal orders.



# QUERÉTARO WITH GOOD GOVERNMENT



# 8.1 Powers of the State

The defense of human liberties rests on the division of powers which is in line with the correct distribution of the functions of the State.

For its exercise, and according to the principle of the division of powers, the public power is divided into Executive, Legislative and Judicial, based on article 49 of the Political Constitution of the United Mexican States, as well as article 13 of the Constitution of the Free and Sovereign State of Querétaro.

## 8.1.1. Executive Power

The Executive Power is deposited on the citizen referred to as State Governor, who legally represents the State of Querétaro, and who enters into office on the first day of October of the year of their election, and is in office for six years, based on attributions, powers, functions and obligations that the Political Constitution of United Mexican States establishes, as well as the Political Constitution of the Free and Sovereign State of Querétaro.



### Agencies and functions

For the performance of its functions, the holder of the Executive Power has the following agencies:

**1. Ministry of Government**

Conducts internal policy and governability of the state.

**2. Ministry of Planning and Finance**

Exercises financial and tax administration of Querétaro’s public finances.

**3. Ministry of Comptrollership**

Plans, organizes, proposes and coordinates the prevention, surveillance, control and evaluation systems of the departments and agencies of the Executive Power and of different state-owned entities

**4. Ministry of Sustainable Development**

Orders, promotes and encourages industrial, commercial, mining, agro-industrial and craftsmanship development and implements the regulations for the preservation and restoration of the ecological balance and environmental protection.

**5. Ministry of Agriculture**

Carries out actions to foster production and promote a full development of the rural sector.

**6. Ministry of Urban Development and Public Works**

Regulates the urban development, the organization of human settlements, and designs and executes state public works.

**7. Ministry of Education.**

Executes actions directed towards encouraging the educational and cultural development of the state.

**8. Ministry of Labor**

Assists with federal duties in the application and monitoring of labor regulations.

**9. Ministry of Tourism**

Conducts the policies of development and fostering of state tourist activity.

**10. Ministry of Health**

Coordinates and implements actions related to the health system according to the federal guidelines and the prevailing conditions in the state.

**11. Main Administrative Office**

Offers administrative support that the departments of the Executive Power may require.

**12. Ministry of Citizen Security**

Safeguards the public order and social peace through prevention, combating antisocial behaviors and protection of the people and their property.

**13. Ministry of Youth**

Plans, formulates, arranges, coordinates and evaluates public policies aimed at a harmonic development of the youth through inclusion and equity of economic, social and cultural opportunities.

**14. Ministry of Social Development**

Coordinates policies, programs and actions intended for the social development of the citizens.

**15. Office of Governorship**

This department is in charge of the Private Ministry, Technical Ministry, Advisor Coordination, Public Relations Coordination, Social Communication Coordination and Legal Consulting.

**16. Ministry of Culture**

Plans, executes and conducts cultural policies in the state.



Directory of the Executive Power of the State of Querétaro

Central Agencies

Coordination of Social Communication

Calle 5 de Mayo esquina Calle Pasteur.  
Colonia Centro. C.P. 76000  
(442) 238 5000 | Ext. 5634

Main Administrative Office

Calle 5 de Mayo esquina Calle Pasteur.  
Colonia Centro. C.P. 76000  
(442) 238 5000 | Ext. 5027

Office of Governorship

Calle 5 de Mayo esquina Calle Pasteur.  
Colonia Centro. C.P. 76000  
(442) 238 5000 | Ext. 5604

Ministry of Agriculture

Calle Ignacio Zaragoza No. 334 Pte.  
Colonia Niños Héroes. C.P. 76010  
(442) 192 6600 | Ext. 6609

Ministry of Sustainable Development

Blvd. Bernardo Quintana No. 204  
Colonia Carretas. C.P. 76050  
(442) 211 6800

Ministry of Urban Development and Public Works

Calle Francisco I. Madero No. 72  
Colonia Centro C.P. 76000  
(442) 227 1800

Ministry of Education

Av. Luis Pasteur No. 23 Sur  
Colonia Centro. C.P. 76000  
(442) 238 5000 | Ext. 5114

Ministry of Government

Calle 5 de Mayo No. 45  
Colonia Centro. C.P. 76000  
(442) 238 5040 | Ext. 5040

Ministry of Comptrollership

Calle 5 de Mayo esquina  
Calle Pasteur. Colonia Centro. C.P. 76000  
(442) 238 5000 | Ext. 5012

Ministry of Youth

Blvd. Bernardo Quintana s/n. Villas del  
Parque Querétaro 2000. C.P. 76159  
(442) 224 2254

Ministry of Finance

Calle 5 de Mayo esquina Calle Pasteur.  
Colonia Centro. C.P. 76000  
(442) 238 5000 | Ext. 5049

Ministry of Health

Calle 16 de Septiembre No. 51  
Colonia Centro. C.P. 76000  
(442) 251 9000

Ministry of Citizen Security

Calle Río Tuxpan No. 107  
Desarrollo San Pablo. C.P. 76130  
(442) 309 1400

Ministry of Tourism

Paseo de la Artes 1531-B  
Colonia Centro Sur. C.P. 76090  
(442) 238 5067 | 800 715 1742

Ministry of Labor

Calle Francisco I. Madero No. 70  
Colonia Centro. C.P. 76000  
(442) 227 1800 | Ext. 1800

Private Secretary

Calle 5 de Mayo esquina Calle  
Pasteur, Centro. C.P. 76000  
(442) 238 5000 | Ext. 6012

Ministry of Culture

Calle José María Arteaga No. 89  
Colonia Centro. C.P. 76000  
(442) 251 9850

SUSTAINABLE  
QUERÉTARO

INFRASTRUCTURE  
AND EQUIPMENT

QUALITY OF LIFE

PRIMARY SECTOR

SECONDARY SECTOR

TERTIARY SECTOR

TOURISM AND CULTURE

GOVERNMENT  
SERVICES

Source: Ministry of Sustainable Development, with information from website of the State of Querétaro Government, 2021.



# Directory of the Executive Power of the State of Querétaro

## Decentralized Entities

**CECEQ | Educational and Cultural Center of the State of Querétaro “Manuel Gómez Morín”**

Av. Constituyentes esquina Av. Luis Pasteur s/n. Colonia Villas del Sur. C.P. 76000 | T(442) 251 9600

**CENADAC | National Contemporary Dance Center**

Calle Sierra de Tilaco No. 201 Colonia Villas del Sol. C.P. 76046 (442) 213 7255 | (442) 213 7256 | Ext. 104

**CAMEQ | Commission for Medical Arbitration of the State of Querétaro**

Calle Corregidora No. 55 Nte. despachos 101. Colonia Centro. C.P. 76000 (442) 214 4819 | (442) 224 1094

**CECA | State Board Against Addictions**

Calle Independencia No. 97 Centro Histórico. C.P. 76000 (442) 212 9687

**COESPO | State Board of Population**

Calle Benito Juárez No. 50 Nte. Colonia Centro. C.P. 76000 (442) 251 8608

**CESP | State Board of Public Security**

Calle Río Tuxpan No. 107 Colonia Desarrollo San Pablo. C.P. 76130 (442) 309 1400

**CEDEM | State Coordination of Municipal Development**

Calle Benito Juárez No. 50 Colonia Centro. C.P. 76000 (442) 251 8600 | Ext. 8606

**CEPCQ | State Coordination of Civil Protection**

Calle Río Tuxpan No. 107 Colonia Desarrollo San Pablo. C.P. 76130 (442) 309 1430

**CBENEQ | Teacher’s College of the State of Querétaro**

Calle San Mateo s/n. Colonia Vista Alegre. C.P. 76090 (442) 213 1131

**ENSQ | Teacher’s College of Querétaro**

Calzada Colón No. 14 Colonia Centro. C.P. 76000 (442) 214 4741 | (442) 214 4941

**IECEQ | Institute for Constitutional Studies of the State of Querétaro**

Calle Miguel Hidalgo No. 2 Colonia Centro. C.P. 76000 (442) 212 0619 | (442) 224 0040

**INDEREQ | Institute for Sport and Recreation of the State of Querétaro**

Bldv. Bernardo Quintana Arrioja No. 95 Colonia Villas del Parque. C.P. 76140 (442) 220 6810 | (442) 220 6813

**JAP | Private Assistance Board**

Calle Francisco I. Madero No. 190 Colonia Centro. C.P. 76000 (442) 213 2606 | (442) 223 2364

**Transparency Unit of the Executive Power**

Andador Libertad No. 54, primer piso. Colonia Centro. Querétaro, Qro. C.P. 76000 (442) 238 5000 | Ext. 5543 y 5544

Source: Ministry of Sustainable Development, with information from website of the State of Querétaro Government, 2021.



Directory of the Executive Power of the State of Querétaro

Entities

AIQ | International Airport of Querétaro

Carretera Estatal 200 Qro-Tequisquiapan No. 22500  
Colonia Galeras. Colón, Qro. C.P. 76270  
(442) 192 5500

CQA | Querétaro's Crafts House

Andador Libertad No. 52  
Colonia Centro. Querétaro, Qro. C.P. 76000  
(442) 214 1235

CETQRO | State Transplant Center of Querétaro

Calle Prol. Ignacio Zaragoza No. 58  
Colonia La Capilla.  
(442) 222 6553 | (442) 222 6654

COBAQ | High School of the State of Querétaro

Av. Constituyentes No. 35  
Colonia San Francisquito. C.P. 76058  
(442) 291 9400

CONALEP | Technical and Professional Education School of the State of Querétaro

Calle Fray Juan de Zumárraga No. 42  
Colonia Cimatario. C.P. 76030  
(442) 216 2663 (442) 242 3049

CECYTEQ | Scientific and Technological Studies School of the State of Querétaro

Calle del Carrizal No. 27  
Colonia El Carrizal. Querétaro, Qro. C.P. 76030  
(442) 216 0196 (442) 242 1454

CEA | State Water Commission

Av. 5 de Febrero No. 35  
Colonia Las Campanas. C.P. 76010  
(442) 211 0600

CEI | State Infrastructure Commission

Calle Pasteur No. 27 Nte.  
Colonia Centro. C.P. 76000  
(442) 689 0665

CONCYTEQ | Science and Technology Board of the State of Querétaro

Av. Luis Pasteur No. 36 Sur  
Colonia Centro. C.P. 76000  
(442) 212 7266 (442) 224 3218

IAOQ | Arts and Trades Institute of Querétaro

Calle Emeterio González No. 60  
Colonia Hércules. C.P. 76069  
(442) 234 6844

ICATEQ | Training Institute for Work of the State of Querétaro

Calle Fray Pedro de Gante No. 10  
Colonia Cimatario. C.P. 76030  
(442) 348 1100

ICESEQ | Training and Security Studies Institute of the State of Querétaro

Calle Plutarco Elías Calles s/n  
Colonia Santa María Magdalena.  
(442) 221 1601

Source: Ministry of Sustainable Development, with information from website of the State of Querétaro Government, 2021.



# Directory of the Executive Power of the State of Querétaro

## Entities

### IIFEQ | Physical Educational Infrastructure Institute of the State of Querétaro

Calle Guatemala No. 2-A  
Colonia Lomas de Querétaro. C.P. 76190  
(442) 216 1276 (442) 216 9696

### IVEQ | Housing Institute of the State of Querétaro

Av. Pie de la Cuesta No. 2121-18  
Colonia Lomas de San Pedrito Peñuelas. C.P. 76148  
(442) 192 9200

### IQM | Querétaro Institute for Women

Calle Gral. Mariano Reyes No. 17  
Colonia Centro. C.P. 76000  
(442) 216 47 57

### PFAQ | Board of Festivities of the State of Querétaro

Acceso 1, Nave 12 int. 112  
Fraccionamiento Industrial La Montaña. C.P. 76150  
(442) 214 1289

### PEPMADU | State Attorney's Office of Urban Development and Environment Protection

Prol. Corregidora Sur No. 25 int.101  
Colonia Centro. C.P. 76000  
(442) 215 2882 (442) 215 7660

### SECCE | State System for Cultural and Educational Communication

Calle Pasteur No. 6 Nte.  
Colonia Centro. C.P. 76000  
(442) 238 5000 Ext. 5120 y 5433

### DIF | System for Integral Family Development of the State of Querétaro

Av. Luis Pasteur No. 6-A  
Colonia Centro. C.P. 76000  
(442) 238 5108 (442) 238 5109

### USEBEQ | Service Unit for Basic Education in the State of Querétaro

Av. Magisterio No. 1000  
Colonia Colinas del Cimatario. C.P. 76090  
(442) 238 6000

### UNAQ | Aeronautical University in Querétaro

Carretera Estatal 200 Qro-Tequisquiapan No. 22154  
Parque Aeroespacial. Colón, Qro. C.P. 76278  
(442) 101 6600

### UPQ | Polytechnic University of Querétaro

Carretera Estatal 420 s/n  
El Marqués, Qro. C.P. 76240  
(442) 101 9000

### UPSRJ | Polytechnic University of Santa Rosa Jauregui

Carretera Federal 57 Qro-SLP,  
km 31+150. Parque Industrial  
Querétaro. C.P. 76220  
(442) 1961 300 Ext. 111

### UTC | Technological University of Corregidora

Carretera Estatal 413 Qro-Coroneo,  
km 11.2. Colonia El Pueblito.  
Corregidora, Qro. C.P. 76900  
(442) 483 0070  
Ext. 1013, 1011, 1012

### UTEQ | Technological University of Querétaro

Av. Pie de la Cuesta No. 2501  
Colonia Nacional. Querétaro,  
Qro. C.P. 76148  
(442) 209 6100

### UTSJR | Technological University of San Juan del Río

Av. La Palma No. 125  
Colonia Vista Hermosa. San  
Juan del Río, Qro. C.P. 76800  
(427) 129 2000

Source: Ministry of Sustainable Development, with information from website of the State of Querétaro Government, 2021.





### 8.1.2. Legislative Power

The State Legislature exercises its functions by means of popular representation in charge of legislators. They remain in power for three years and may hold office for the next immediate term in accordance with the applicable legal provisions regarding reelection principles.

Legislators are led by a state congress board during a term of up to six months.

● **Legislative Groups and Sections**

Integration by each political party, coalition or independent legislators with representation in the Legislature, who have participated in the immediately preceding election.

● **State Congress Board**

Elected by majority of votes of the legislators. Its main function is to conduct and order work and performance of the Legislative Power under the principles of impartiality and objectivity.

● **Political Coordination Board**

It is the entity responsible for the State Legislature’s political decision making. This board is integrated by coordinators of legislative groups and sections.

● **Ordinary and Special Commissions**

Integrated by a president, a secretary and up to three members, in such a way that the number of members is always an odd number. The Ordinary Commissions deal with matters entrusted by the Plenary Session of the State Legislature, appointing matters in accordance with its denomination. The Special Commissions carry out the research or resolution of specific matters that require a certain treatment.

● **Transparency Committee of the State Legislative Power**

It monitors, instructs and coordinates actions and proceedings for the transmission of information of public interest. It is organically subordinated to the State Congress Board to which it has to present a bimonthly report of its activities.



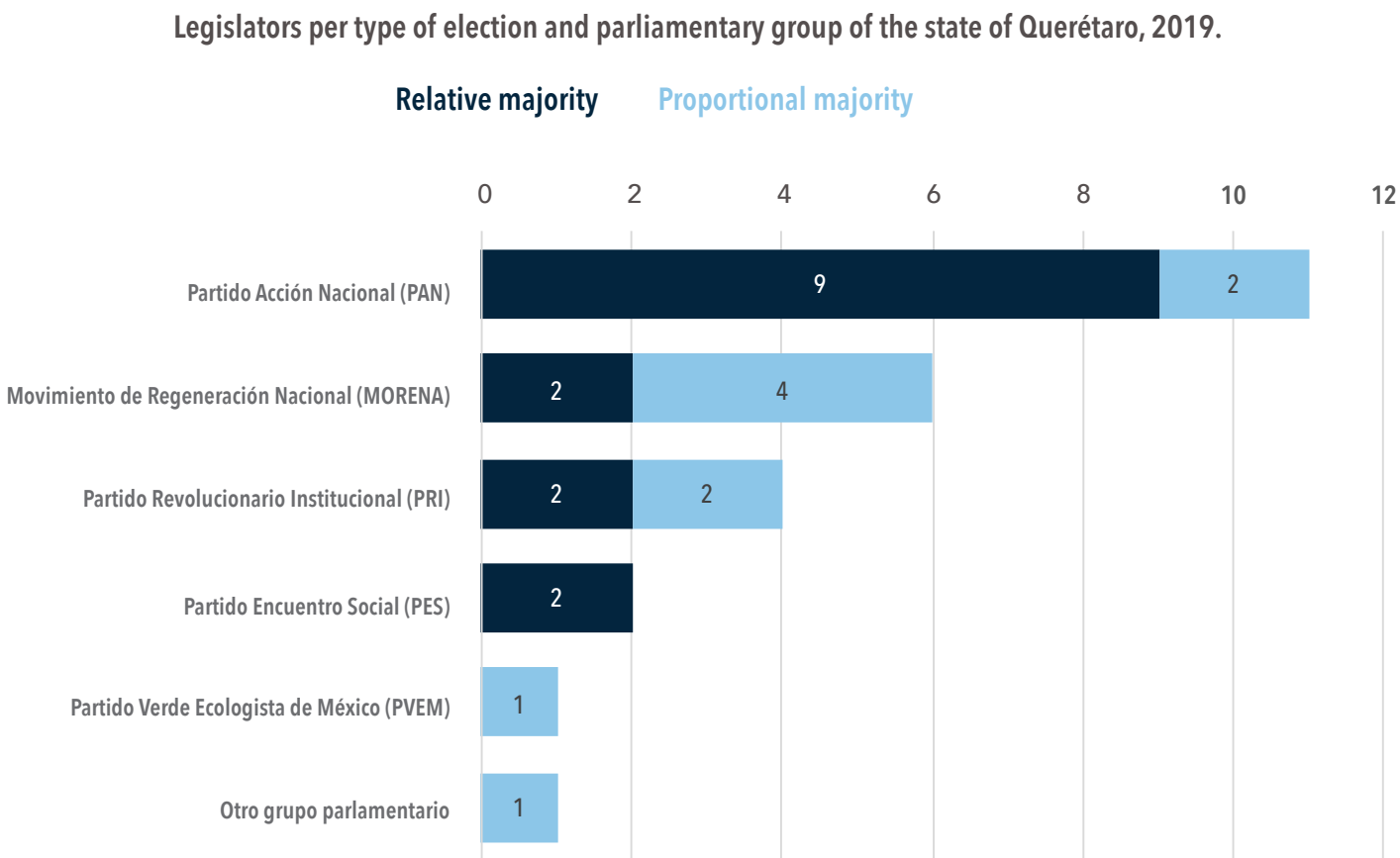
Legislative Commissions

The legislative commissions are permanent legislative entities responsible of ruling and/or preparing for resolution the initiatives and other matters related to the Plenary Session of the State Legislature pursuant to the specific competence per subject.

There are a total of 25 Ordinary Commissions, each one integrated by 3 members. Each legislator may integrate more than one of the following commissions:

- Access to Information.
- Justice Department and Law Enforcement.
- Migrant Matters.
- Indigenous Matters.
- Municipal Matters.
- Science, Technology and Innovation.
- Sustainable Rural and Agricultural Development.
- Economic Development and Commerce.
- Social Development, Vulnerable Groups and Housing.
- Urban Development, Public Works and Communications.
- Education and Culture.
- Family.
- Governance, Public Administration and Electoral Matters.
- Gender Equality and Human Rights.
- Instructor.
- Youth and Sport.
- Environment.
- Sustainable Mobility and Transit.
- Citizen Participation.
- Planning and Budget.
- Constitutional Points.
- Health.
- Public Security and Civil Protection.
- Work and Social Welfare.
- Tourism.

At the end of 2019 the distribution per type of election and parliamentary group of legislators that integrated the State Congress was the following:



Source: National Census of State Legislative Powers (CNPLE), 2020.

During 2019, there were 842 initiatives presented before the State Congress and Legislative Assembly of the State of Querétaro, out of which 599 were approved and distributed as follows: 11.2% correspond to laws and 88.8% to decrees.



Source: National Census of State Legislative Powers (CNPLE), 2020.





## 8.1.3. Judicial Power

### *Structure and functions*

In Querétaro the Judicial Power is formed by the Supreme Court of Justice, the Judiciary Council, first instance courts, minor courts and public officials in charge of the administration and delivery of justice.

- **Supreme Court of Justice and first instance and minor courts**

The Supreme Court of Justice is formed by thirteen presiding magistrates among which a president and eight supernumeraries with honorary character are elected. Their functions are to support the federal entities and other authorities in terms of what the related laws may determine; make rogatory letters, summons and resolutions related to the civil, commercial, family or criminal matters, among others. This allows the jurisdictional function to be prompt, complete, independent, impartial and free.

- **Judiciary Council**

Manages, monitors and establishes the discipline in jurisdictional and administrative areas. It determines the number of courts needed for each judicial district per matter, with the purpose of providing good service.

- **Civil, criminal, family and mixed courts**

They are specialized entities in mercantile orality, justice for juveniles and are also courts that execute first-instance criminal sanctions. In the state of Querétaro there are six judicial districts that cover eighteen municipalities: Amealco de Bonfil, Cadereyta de Montes, Jalpan de Serra, Querétaro, San Juan del Río and Tolimán.

- **Minor Courts**

They can be civil, criminal or mixed courts. They are located in each one of the municipal heads of the State and in the delegations that may require it. Minor judges, appointed by the Judiciary Council, remain in their position for six years and may be ratified for another nine years pursuant to the performance evaluation carried out by the same Council.



# 8.2. Government Efficiency

## 8.2.1. Administrative Quality

One of the main responsibilities of the government administration is to be an effective facilitator that provides optimal responses to citizens’ needs. To this end, it promotes quality government services in accordance with Querétaro’s human and socioeconomic development.

### Trained Public Officials

Among the lines of action established to promote government efficiency, training stands out. This is proposed in the Querétaro with Good Government Principle of the 2016-2021 State Development Plan and consists of improving the level of competencies and professionalization of the state’s public officials. For this reason, since 2015 the state government has been carrying out training programs. They focused mainly on the following topics:

- 1. Ethics Code and Administrative Responsibilities Law
- 2. Human Development and stress management
- 3. Computer science

There were 206 training events for 2,956 public officials in 2020, achieving a 65.2% coverage of the total personnel on payroll.

A total of 1,582 training events were held from 2016 to 2020, and an average of 3,646 public officials were trained per year.

### Public Officials’ asset and interest declaration

Strategy V.2 is considered within the Querétaro with Good Government principle of the 2016-2021 State Development Plan, with the aim of strengthening a transparent and accountable management in the state of Querétaro. One of its lines of action is to “Promote the culture of transparency in the State Public Administration”. Therefore, one of the main obligations is the Presentation of asset and interest declaration.

In view of the above, during the year 2020, public officials filed their asset and interest declaration through the platform called DeclaraNetplus, complying with the stated in the Administrative Responsibilities Law.

### State Budget

In accordance with the publication made in the official newspaper «La Sombra de Arteaga», the following information is registered regarding the Income Law and State Expenditure Budget for the year 2020:

Income Law of the State of Querétaro, 2020.			
Concept	Amount	Total	%
Taxes	2,931,917,170		
Social security fees and contributions	0		
Special contributions	0		
Fees	1,553,584,293		
Products	442,956,296		
Duties	175,403,837		
Income due to sale of goods, provision of services and other income	0		
Total of local income		5,103,861,596	13.8
Shares	15,143,246,287		
Contributions	12,070,009,689		
Agreements	3,279,448,223		
Incentives from fiscal collaboration	1,470,208,711		
Non-contribution funds	0		
Shares, contributions, agreements, incentives from fiscal collaboration and non-contribution funds		31,962,912,910	86.2
Transfers, assignments, subsidies, grants, pensions and retirements	0		
Extraordinary income	0		
Total		37,066,774,506	100.0

Source: Official Newspaper La Sombra de Arteaga.



Pursuant to Article 53 Ter of the Law for the Management of Public Resources of the State of Querétaro, the financing of the Executive Power of the State of Querétaro, foreseen at the beginning of fiscal year 2020, is integrated in the following manner:

Concept	Amount	Total
Federal Transfers	54,399,922	
Committed, accrued or linked to formal payment commitments state resources	719,608,008	
Discretionary state resources	4,495,971,863	
<b>Own Financing</b>		<b>5,269,979,793</b>

Source: Official Newspaper La Sombra de Arteaga.

The total estimated resources considered for the 2020 Fiscal Year amounted to \$42,336,754,299 (Forty two thousand three hundred and thirty-six million seven hundred and fifty-four thousand two hundred and ninety-nine pesos 00/100 M.N.).

It is important to mention that, pursuant to Article 3 of the Income Law of the State of Querétaro, for the 2020 Fiscal Year, own financing that would be exercised amounted to \$3,618,724,076 (Three thousand six hundred and eighteen million seven hundred and twenty-four thousand seventy-six pesos 00/100 M.N.)

The total income to exercise during the fiscal year that was contemplated in the formulation of the 2020 Expenditure Budget, amounted to \$40,685,498,582 (Forty thousand six hundred and eighty-five million four hundred and ninety-eight thousand five hundred and eighty-two pesos 00/100 M.N.).

It is worth noting that, within the expenditure budget, the most favored items are: transfers to state owned entities in the education sector 29.9%, works and actions 19.7% and transfers to municipalities with 15.3%.

Expenditure Budget of the State, 2020.		
Concept	Amount	%
Expenditure Budget of the State	\$40,685,498,582.00	100.0%
Transfers to municipalities	\$6,220,268,391.00	15.3%
Transfers to Legislative Power	\$324,837,597.00	0.8%
Transfers to Judicial Power	\$955,295,736.00	2.3%
Transfers to autonomous agencies and administrative courts	\$1,322,971,355.00	3.3%
Total trasfers to state owned entities of education sector	\$12,157,387,313.00	29.9%
Total trasfers to state owned entities of health sector	\$4,259,346,004.00	10.5%
Total trasfers to state owned entities of security and government	\$1,129,129,410.00	2.8%
Total trasfers to state owned entities of other sectors	\$730,429,295.00	1.8%
Public debt	\$255,741,393.00	0.6%
Capital amortization	\$245,973,887.00	
Interests	\$9,767,506.00	
Pensions and retirements	\$775,679,835.00	1.9%
Works and actions	\$8,008,136,747.00	19.7%
Agencies of central sector and auxiliary entities	\$4,546,275,506.00	11.2%

Source: Official Newspaper La Sombra de Arteaga.

The state resource of \$4,546,275,506 assigned to central sector agencies and auxiliary entities is distributed as follows:

Assigned budget to agencies of central sector and auxiliary entities, 2020.	
Govenorship	\$ 8,233,703.00
Office of Govenorship	\$ 420,786,886.00
Government Sector	\$ 493,080,223.00
Citizen Security Sector	\$ 714,375,964.00
Finance Sector	\$ 671,873,171.00
Comptrollership Sector	\$ 169,839,290.00
Sustainable Development Sector	\$ 129,834,554.00
Agricultural Sector	\$ 136,434,064.00
Urban Development and Public Works Sector	\$ 191,371,240.00
Education Sector	\$ 423,950,857.00
Youth Sector	\$ 28,412,649.00
Social Development Sector	\$ 72,464,033.00
Labor sector	\$ 111,970,852.00
Tourism Sector	\$ 150,351,164.00
Health Sector	\$ 21,301,311.00
Main Administrative Office Sector	\$ 645,249,863.00
Culture Sector	\$ 156,745,682.00
<b>Total</b>	<b>\$ 4,546,275,506.00</b>

Source: Official Newspaper La Sombra de Arteaga.



# 8.2.2. Government processes and services

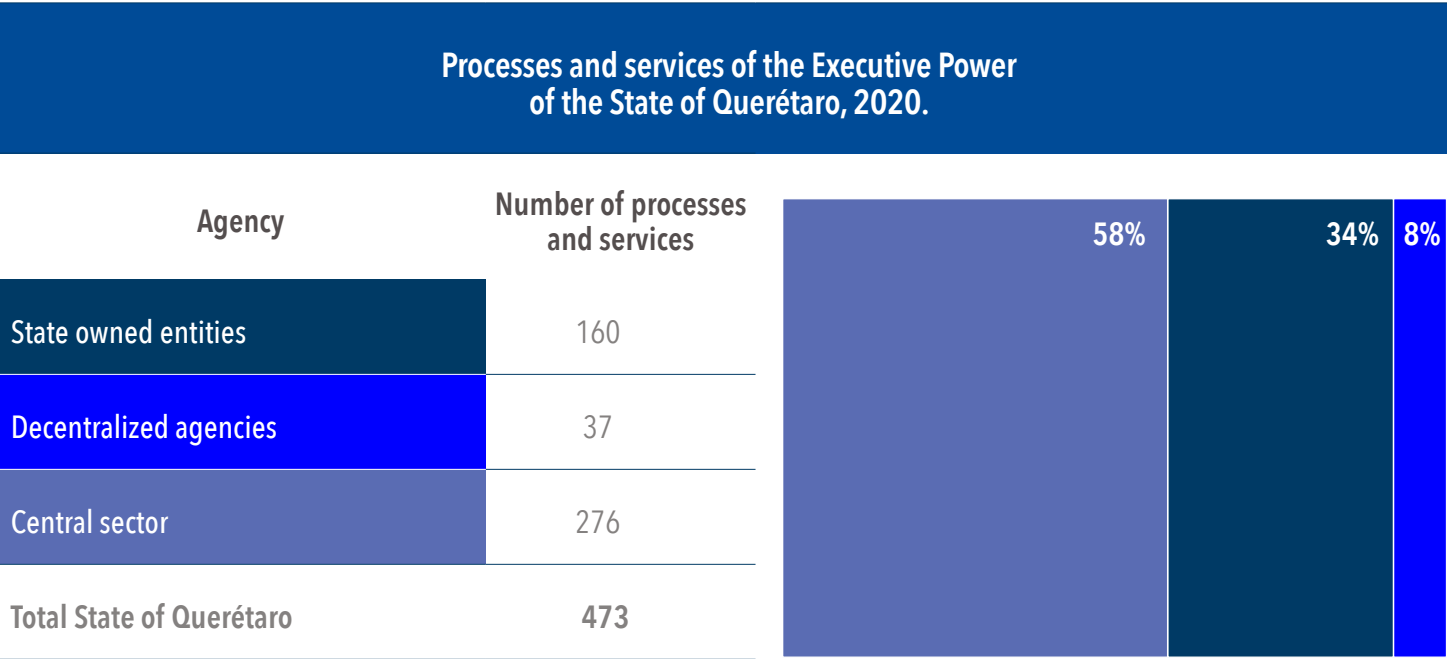
The State Public Administration attends and carries out in a timely manner processes and quality services; this action is fundamental and necessary to consolidate the competitiveness of the entity.

## State Registry of Processes and Services (RETS)

On October 3rd, 2018 the Querétaro State Regulatory Improvement Law was published. Its main goals are to increase the economic growth and competitiveness of the state, as well as to simplify administrative procedures in processes and services for the benefit of businessmen and citizens.

According to the National Strategy of Regulatory Improvement, the Regulatory Improvement Commission of the State of Querétaro modified the content of the processes and services of the Executive Power, strengthening the bases and criteria for the integration and registration of the RETS. This action establishes the technical elements that must be complied with by the Agencies, their Decentralized Entities and the State-owned Entities in the approval and publication of the technical specifications, ensuring the quality of the information provided to the citizens. In 2020, 473 records of processes and services were registered in the platform of the State Executive Power, deleting 2% of the number of processes compared to the previous year.

The majority of these processes and services were concentrated in the central sector with 58%, followed by the state-owned entities with 34% and, lastly, decentralized entities with the remaining 8%.



Source: State Regulatory Improvement Commission, 2021.

In the month of May of 2020, the follow up actions of the Regulatory Improvement Programs 2019-2021 were registered, having as a main purpose the implementation of actions to simplify processes and services.

Also, actions were established for the simplification, modification, replacement, elimination or merging of 81 processes and services of the 208 that were first registered, by the agencies, their decentralized entities and the state-owned entities.

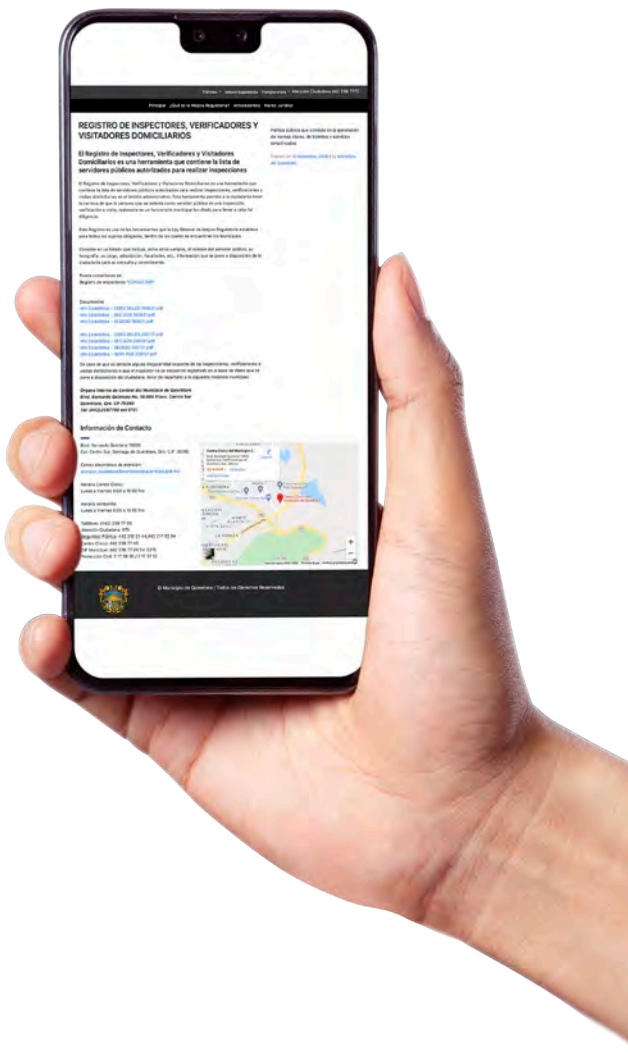
On the other hand, 2 regulatory programs were registered in 2020. This tool is a biannual regulatory planning instrument, which allows to compile and disclose the projection of regulations that the Obligated Entities (Agencies, decentralized entities and the state-owned entities) intend to publish.

For its application there is a platform that is in line with the elements set forth in the General Law for Regulatory Improvement, giving priority to swiftness in its collection and simplicity in its search.

## Registry of the list of inspectors, verifiers, visitors or supervisors and home visits of the Executive Power of the State of Querétaro

In October 2020, the Regulatory Improvement Commission modified the Platform of the registry of inspectors, verifiers, visitors and supervisors of the Executive Power in accordance with the provisions of the National Strategy for Regulatory Improvement; therefore, 287 registers were updated.

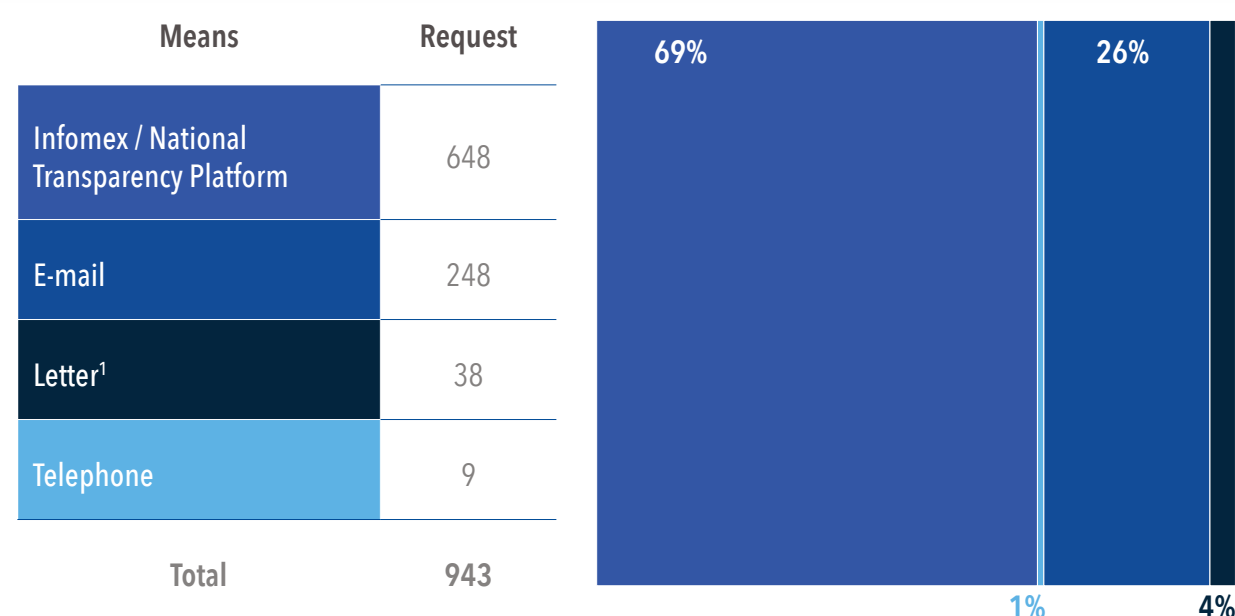
These actions establish a fundamental mechanism to fight corruption, providing legal certainty to investors, businessmen and citizens.







Means used for information requests, 2020.



Source: Transparency Unit of the Executive Power of the State, 2021.

<sup>1</sup>Including received in mailbox assigned by the UTPE for those purposes

### 8.2.3. Access to information

The Querétaro with Good Government principle of the 2016-2021 State Development Plan, establishes as one of its strategies the strengthening of a transparent and accountable management. Based on this, it was adopted as a line of action to facilitate citizens' access to government information.

#### Access to government information

During the year 2020, the Transparency Unit of the Executive Power registered a total of 943 requests for access to information, which were all attended in a timely manner.

Such requests were made through the following means:

1. System: [www.infomex.queretaro.gob.mx](http://www.infomex.queretaro.gob.mx),  
[www.plataformadetransparencia.org.mx/web/guest/inicio](http://www.plataformadetransparencia.org.mx/web/guest/inicio)
2. E-mail address: [utpe@queretaro.gob.mx](mailto:utpe@queretaro.gob.mx)
3. Letter personally delivered to the offices of the Transparency Unit: currently located at Andador Libertad número 54, planta alta, Colonia Centro. Querétaro, Qro., C.P. 76000 and/or mailbox located on ground floor.
4. Telephone (verbally): record of applicant's request contacting the telephone number of the Transparency Unit: (442) 238-5000 ext. 5187, 5543 or 5544.



# 8.3. Municipal Governments

The Municipal Government is the entity in charge of the municipality. It has political, fiscal and administrative autonomy within the limits agreed upon by the Mexican Constitution and decentralization laws. The state of Querétaro is made up of 18 municipalities.

## Directory of municipal governments of the state of Querétaro

### Colón

Jardín Héroes de la Revolución No. 1  
Colonia Centro. Colón, Qro.  
C.P. 76270  
(419) 234 3700  
[www.colon.gob.mx](http://www.colon.gob.mx)

### Corregidora

Calle Ex Hacienda El Cerrito No. 100.  
Colonia El Pueblito. Corregidora, Qro.  
C.P. 76900  
(442) 209 6000  
[www.corregidora.gob.mx](http://www.corregidora.gob.mx)

### El Marqués

Calle Venustiano Carranza No. 2  
Colonia La Cañada. El Marqués, Qro.  
C.P. 76240  
(442) 238 8400  
[www.elmarques.gob.mx](http://www.elmarques.gob.mx)

### Ezequiel Montes

Calle Belisario Domínguez No. 104  
Colonia Centro. Ezequiel Montes, Qro.  
C.P. 76650  
(441) 277 0707  
[www.ezequielmontes.gob.mx](http://www.ezequielmontes.gob.mx)

### Huimilpan

Calle Reforma No. 158 Ote.  
Colonia Centro. Huimilpan, Qro.  
C.P. 76950  
(448) 278 5047  
[www.huimilpan.gob.mx](http://www.huimilpan.gob.mx)

### Jalpan de Serra

Calle Independencia No. 12  
Colonia Centro. Jalpan de Serra, Qro.  
C.P. 76340  
(441) 296 0243  
[www.municipiodejalpan.gob.mx](http://www.municipiodejalpan.gob.mx)

### Landa de Matamoros

Calle Constitución s/n.  
Colonia Centro. Landa de Matamoros, Qro.  
C.P. 76360  
(441) 292 5207  
[www.landadematomorosqro.gob.mx](http://www.landadematomorosqro.gob.mx)

### Pedro Escobedo

Calle Reforma No. 1 Nte.  
Colonia Centro. Pedro Escobedo, Qro.  
C.P. 76700  
(448) 275 0006  
[www.pedroescobedo.gob.mx](http://www.pedroescobedo.gob.mx)

### Peñamiller

Plaza Principal s/n.  
Colonia Centro. Peñamiller, Qro.  
C.P. 76450  
(441) 296 6052  
[www.penamiller.gob.mx](http://www.penamiller.gob.mx)

### Pinal de Amoles

Calle Benito Juárez No. 4  
Colonia Centro. Pinal de Amoles, Qro.  
C.P. 76300  
(441) 292 5030  
[www.pinaldeamoles.gob.mx](http://www.pinaldeamoles.gob.mx)

### Querétaro

Blvd. Bernardo Quintana Arriola No.10000  
Colonia Centro Sur. Querétaro, Qro.  
C.P. 76090  
(442) 238 7700  
[www.municipiodequeretaro.gob.mx](http://www.municipiodequeretaro.gob.mx)

### San Joaquín

Palacio Municipal s/n.  
Colonia Centro. San Joaquín, Qro  
C.P. 76550  
(441) 138 7166  
[www.sanjoaquin.gob.mx](http://www.sanjoaquin.gob.mx)

### San Juan del Río

Paso de los Guzmán no. 24  
Barrio de la Concepción, San Juan del Río, Qro.  
C.P. 76800  
(427) 268 1000  
[www.sanjuandelrio.gob.mx](http://www.sanjuandelrio.gob.mx)

### Tequisquiapan

Calle Palmas No. 5  
Colonia Los Sabinos. Tequisquiapan, Qro.  
C.P. 76750  
(414) 273 2327  
[www.municipiodetequisquiapan.gob.mx](http://www.municipiodetequisquiapan.gob.mx)

### Tolimán

Calle Benito Juárez No. 3  
Colonia Centro. Tolimán, Qro.  
C.P. 76600  
(441) 296 7206  
[www.toliman.gob.mx](http://www.toliman.gob.mx)

Sources: Ministry of Sustainable Development of the Executive Power, with information from the web pages of the Municipal Presidencies of the State of Querétaro, 2021.







# THANKS!

**The “Economic Yearbook 2021, Competitive Querétaro”** is possible thanks to the effort made by each and every one of the people, institutions, organizations and agencies that have contributed to its compilation. A special recognition to each institution, to the professionals who captured in images the results, and to the team in charge of enriching and shaping it, for their invaluable support in the creation of this document that offers very valuable information of the economic and social life of the state, and that serves as a tool for decision making.







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Update date: August 19, 2019.

### DIRECTORY

**Ministry of Sustainable Development  
of the State of Querétaro (SEDESU)**

Blvd. Bernardo Quintana No. 204.  
Querétaro, Qro. C.P. 76050  
Colonia Carretas.  
(442) 211 6800  
[www.sedesu.queretaro.gob.mx](http://www.sedesu.queretaro.gob.mx)  
[sedesu@queretaro.gob.mx](mailto:sedesu@queretaro.gob.mx)

**Sub Ministry of Economic Development  
PyMES Support Directorate  
Entrepreneurial Development Directorate  
Regional Development Directorate  
Industrial Promotion Directorate**  
(442) 211 6814

**Sub Ministry of Environment  
Environmental Control Directorate  
Environmental Planning Directorate  
Climate Change and Ecology Center**  
(442) 211 6801

**International Airport of Querétaro (AIQ)**  
Carretera Estatal 200 Qro-Tequisquiapan No. 22500  
Colonia Galeras. Colón, Qro. C.P. 76270  
(442) 192 5500

**Querétaro's Craft House (CQA)**  
Andador Libertad No. 52.  
Colonia Centro. Querétaro, Qro. C.P. 76000  
(442) 214 1235 y (442) 224 3456

**Employment Promotion Trust (FIPROE)**  
Plaza Pabellón Querétaro Local no. 70,  
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# 2021

ECONOMIC YEARBOOK

