

Cali-Baja Business Summit 2025 Report

Date: Tuesday, November 18, 2025

Time: 9:00 AM – 6:00 PM

Location: Institute of the Americas, 9909 International Ln, La Jolla, California

1. Introduction

The Cali-Baja Business Summit 2025 was established as a high-level strategic platform aimed at strengthening the economic, industrial, and technological integration of the Cali-Baja megaregion (California–Baja California), within a global context shaped by the reconfiguration of supply chains and the growth of nearshoring. This environment has positioned the region as one of the most dynamic binational ecosystems worldwide, enhancing its relevance in key industries such as advanced manufacturing, medical devices, electronics, aerospace, and emerging technologies.

Currently, the Cali-Baja region stands out for its high level of economic integration, reflected in the daily flow of more than \$2.3 billion in goods crossing the U.S.–Mexico border, as well as the generation of approximately 95,000 jobs in strategic sectors. This dynamism is further reinforced by Mexico's position as the United States' top trading partner under the USMCA, consolidating the region as a critical node for North American competitiveness.

In this context, Tijuana has reaffirmed its role as one of the most competitive industrial destinations in Mexico, maintaining a steady flow of foreign direct investment and business expansion. During 2025, the city recorded the arrival of 15 new companies and 23 expansions, reaching a total of 38 industrial projects, reflecting sustained investor confidence in the region. This performance has been supported by a consolidated industrial ecosystem, with approximately 1,200 companies linked to nearshoring and a robust infrastructure that includes more than 60 industrial parks in Baja California.

Likewise, the region benefits from a highly competitive innovation ecosystem, driven by close collaboration between industry and academia. The Cali- Baja corridor produces approximately 23,000 STEM graduates annually, ensuring a steady pipeline of specialized talent to meet the demands of high-value industries. In addition, the presence of more than 3,100 software companies within the San Diego–Tijuana technology ecosystem further strengthens the region's innovation and technological development capabilities.

Within this context of high competitiveness and binational integration, the Cali-Baja Business Summit 2025 brought together leaders from the public sector, private industry, academia, and economic development organizations with the objective of fostering a strategic dialogue aimed at leveraging these competitive advantages and translating them into concrete regional development actions. Through a comprehensive agenda, the event addressed key topics such as competitiveness, infrastructure, talent, innovation, logistics, and cross-border collaboration, laying the foundation for the development of the Action Agenda 2026.

In this way, the summit not only served as a platform for the exchange of ideas, but also as a strategic mechanism to align visions, strengthen partnerships, and drive initiatives that will help position Cali-Baja as one of the most competitive, innovative, and globally relevant binational regions.

2. Event Development

2.1 Opening Remarks: Building the Future of a Borderless Economy (9:00 – 9:30 AM)



Cali-Baja Business Summit 2025

Summit Agenda

Institute of the Americas
9909 International Ln, La Jolla

Tuesday, November 18
9:00 AM - 6:00 PM

1 Opening Remarks: Building the Future of a Borderless Economy

9:00 - 9:30 am

Malamud Conference Room

Opening session setting the vision for a borderless economy and shared collaboration between Tijuana EDC and UC San Diego.

Adriana Eguia
President
TIJUANA EDC

Rafael Fernandez
Director, Center for U.S.-Mexican Studies
UC San Diego

Kurt Honold
Secretary of Economy and Innovation of Baja California
SEMA | INNOVATE

The opening session featured the participation of Adriana Eguia, President; Rafael Fernandez, Director, Center for U.S.-Mexican Studies; and Kurt Honold, Secretary of Economy and Innovation of Baja California.

This segment of the Cali-Baja Business Summit 2025 established the strategic direction of the event, positioning the Cali-Baja megaregion as a model of binational integration with the potential to evolve into a borderless economy.



During this session, the importance of strengthening collaboration across both sides of the border was emphasized as a key driver for regional competitiveness in an increasingly interconnected global environment shaped by supply chain realignment.

Speakers highlighted that the region benefits from unique structural advantages derived from the complementarity between California and Baja California, particularly in terms of talent, industrial capabilities, innovation, and access to international markets. In this context, it was underscored that the consolidation of a truly binational economy requires not only infrastructure and connectivity, but also strategic alignment among institutions, the private sector, and academia.

Furthermore, the role of economic development organizations and innovation centers was emphasized as critical in facilitating investment attraction, talent development, and the creation of high-value ecosystems. Collaboration between institutions such as Tijuana EDC and regional universities, including UC San Diego, was presented as a clear example of how cross-border cooperation can drive impactful regional initiatives.

Finally, this session laid the conceptual foundation for the event by highlighting the need to evolve toward a more integrated, resilient, and results-driven regional development model. Under this vision, the development of a borderless economy is positioned not only as an aspiration, but as a strategic pathway to strengthen Cali-Baja's competitiveness within North America.

2.2 Binational Trade & Competitiveness Report: Harnessing Opportunity in the Cross-border Economy (9:30 – 10:30 AM)

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Binational Trade & Competitiveness Report

Harnessing Opportunity in the Cross-border Economy

9:30 - 10:30 am

Malamud Conference Room

Presentation of key insights from the Binational Competitiveness Report, highlighting trends, challenges, and opportunities shaping the cross-border economy.



Kenia Zamarripa
VP, International and Public Affairs



Lucas Coleman
Director



Alberto Fragoso
Research Manager



Adriana Eguia
President



Randy Baddo
Chief Financial Officer



Alfredo Dueñez
Senior Director of Manufacturing and Plant Leader at Stryker

10:30 - 11:00 am

Malamud Conference Room

Remarks from the Mayors of San Diego and Tijuana, each sharing their city's perspective and commitment to cross-border collaboration.



Todd Gloria
San Diego Mayor



Ismael Burgueño
Tijuana Mayor



This session featured the participation of Kenia Zamarripa, VP, International and Public Affairs; Alberto Fragoso, Research Manager; Lucas Coleman, Director; Adriana Eguia, President; Randy Baddo, Chief Financial Officer; and Alfredo Dueñez, Senior Director of Manufacturing and Plant Leader at Stryker.

During this session, the Binational Trade & Competitiveness Report was presented, providing a robust analytical framework on the economic relevance of the Cali-Baja region within the North American context. The presentation highlighted the high level of productive integration between California and Baja California, demonstrating that the region operates as an interdependent economic ecosystem with deeply connected supply chains across strategic industries.

One of the report’s key findings was the volume of trade across the U.S.–Mexico border, where more than \$2.3 billion in goods cross daily. This flow positions the region as a highly relevant logistics corridor, essential to the operation of industries such as aerospace, medical devices, electronics, and clean energy, which collectively support approximately 95,000 jobs in the region.

Additionally, it was noted that Mexico has consolidated its position as the United States’ top trading partner under the USMCA, reinforcing the strategic importance of the Cali-Baja region as a platform for advanced manufacturing and exports. In this context, the nearshoring trend has accelerated the relocation of operations to northern Mexico, particularly Baja California, where an ecosystem of approximately 1,200 companies linked to this model is currently concentrated.

The report also underscored the role of talent as one of the region’s key competitive differentiators. It highlighted that the Cali-Baja corridor produces approximately 23,000 STEM graduates annually, which, combined with the presence of more than 3,100 software companies in the San Diego–Tijuana ecosystem, strengthens binational innovation and technological development capabilities.

Finally, the presentation emphasized that, while the region’s potential is significant, its consolidation as a global hub requires continuous coordination between public and private stakeholders, as well as a shared vision capable of translating identified opportunities into concrete development strategies. In this regard, the report served as a key reference point for the summit discussions, providing a quantitative and strategic foundation for decision-making in the Cali-Baja region.

2.3 Smart Border Coalition Panel: Infrastructure for Global Competitiveness (11:00 AM – 12:00 PM)

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Smart Border Coalition Panel

Infrastructure for Global Competitiveness

11:00 am – 12:00 pm

Malamud Conference Room

Discussion led by the Smart Border Coalition on advancing cross-border infrastructure to enhance regional integration and global competitiveness.



OTAY
MESA

Alejandra Mier y Teran

Executive Director



CBX

Jorge Goytortua

Chief Executive Officer



SANDAG

Mario Orso

Chief Executive Officer



TEXAS
CENTER

Daniel Covarrubias

Director

The Smart Border Coalition panel featured the participation of Alejandra Mier y Teran, Executive Director; Jorge Goytortua, Chief Executive Officer; Mario Orso, Chief Executive Officer; and Daniel Covarrubias, Director.



The discussion highlighted the importance of border infrastructure as a key driver of global competitiveness for the Cali-Baja region. During the session, it was emphasized that the growth of binational trade and the attraction of investment depend largely on more efficient border crossings, improved logistics connectivity, and infrastructure capable of meeting industry demands.

Panelists also underscored the need to modernize border crossings through reduced wait times, process optimization, and the implementation of smart infrastructure solutions. They agreed that binational coordination and collaboration between the public and private sectors will be essential to advancing strategic projects that strengthen regional competitiveness.

Finally, it was noted that a more agile and efficient border not only facilitates trade, but also represents a competitive advantage in positioning Cali-Baja as one of the most attractive regions for investment and industrial development in North America.

2.4 Defining Game-Changers Cali-Baja Industries: Executive Talks (12:00 – 1:00 PM)

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Defining Game-Changers Cali-Baja Industries

Executive Talks

12:00 - 1:00 pm

Malamud Conference Room

Executive talks highlighting the industries and innovations driving Cali-Baja's leadership in competitiveness, technology, and cross-border growth.



Richard Kiy

President



Mark Field

Chief Information Officer



Horman Millan

Short-Term Consultant



Alan Rusell

Chief Executive Officer



Nikia Clarke

Chief Strategy Officer

This session brought together business leaders from various sectors, including Richard Kiy, President; Horman Millan, Short-Term Consultant; Mark Field, Chief Information Officer; Alan Rusell, Chief Executive Officer; and Nikia Clarke, Chief Strategy Officer, who shared their perspectives on the industries driving economic transformation in the Cali-Baja region.



Through their insights, the importance of strategic sectors such as advanced manufacturing, medical devices, electronics, and technology was highlighted, reinforcing the region's position as a global hub for industry and innovation.

Speakers agreed that the growth of these industries is closely linked to the region's ability to integrate specialized talent, technological innovation, and binational supply chains. In this context, digitalization, automation, and the development of technical capabilities were emphasized as key factors for maintaining competitiveness in an increasingly globalized market.

Furthermore, it was underscored that collaboration among companies, academic institutions, and economic development organizations is essential to accelerate the growth of these sectors and fully leverage nearshoring opportunities. Overall, the session identified these industries as "game-changers" for the future of Cali-Baja, as they represent key drivers of growth, investment, and value creation in the region.

2.5 Business Conversations Over Lunch (1:00 – 3:15 PM)

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Business Conversations Over Lunch

1:00 - 3:15 pm

Friend Plaza

7-8 discussion groups addressing two key questions: one focused on the summit's insights and another on the broader Cali-Baja region.

During this segment, a series of roundtable discussions were held, enabling more direct interaction among participants and creating a space conducive to the exchange of ideas and the analysis of the key topics addressed throughout the summit. Through these discussions, attendees explored the main challenges and opportunities facing the Cali-Baja region, as well as potential strategies to strengthen its long-term competitiveness.

The conversations focused on reflecting on the summit's key insights and proposing concrete actions aimed at advancing regional economic development, addressing topics such as infrastructure, talent, innovation, and binational collaboration. This format facilitated the creation of new connections, the strengthening of strategic partnerships, and the identification of potential initiatives among key stakeholders within the ecosystem.

Overall, this segment enriched the summit's dialogue by shifting the discussion to a more practical and collaborative level, allowing participants to align perspectives and move toward proposals that can be translated into impactful projects for the region.

2.6 Entrepreneurship: Catalyzing Binational Innovation (3:30 – 4:30 PM)

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Entrepreneurship

Catalyzing Binational Innovation

3:30 – 4:30 pm.

Malamud Conference Room

Entrepreneurship session exploring how cross-border collaboration fuels innovation, talent development, and the next generation of Cali-Baja startups.



ITC

Dr. Jorge Tagle

Executive Director



AQUACYCL

Orianna Bretschger

Chief Executive Officer



HOBBIY CONTROL CENTER

Dr. Ariel Ortiz

Chief Executive Officer



SEMA

Rodolfo Andrade

Under Secretary of Economy and Innovation



Biocom California

Miguel Motta

Senior Vice President & Chief Operating Officer

This session featured the participation of Dr. Jorge Tagle, Executive Director; Orianna Bretschger, Chief Executive Officer; Dr. Ariel Ortiz, Chief Executive Officer; Rodolfo Andrade, Under Secretary of Economy and Innovation; and Miguel Motta, Senior Vice President & Chief Operating Officer.

The discussion highlighted the role of innovation as a key driver of economic development in the Cali-Baja region, emphasizing the value of binational ecosystems in the creation and scaling of new ventures. Topics addressed during the panel included the development of entrepreneurial talent, collaboration between startups and industry, and the importance of fostering environments that enable cross-border innovation.



Participants agreed that the region benefits from significant advantages derived from the combination of California's technological capabilities and Baja California's manufacturing strength, enabling the accelerated development of innovative solutions with global impact. Additionally, the growth of the startup ecosystem was emphasized, along with the importance of strong linkages with universities, research centers, and established companies to drive new initiatives.

Finally, it was underscored that binational collaboration not only facilitates access to talent and capital, but also enables more efficient scaling of projects, positioning Cali-Baja as a highly competitive environment for entrepreneurship and innovation in North America.

2.7 Closing Remarks: Building the Action Agenda 2026 (4:30 – 5:00 PM)



7 Closing Remarks
Building the Action Agenda 2026

4:30 – 5:00 pm

Malamud Conference Room

Closing session outlining key takeaways from the summit and setting the foundation for the 2026 Binational Action Agenda.

Joaquin Luken
Executive Director

Adriana Eguia
President

Richard Kiy
President

Rafael Fernandez
Director, Center for U.S.-Mexican Studies

The closing session featured the participation of Joaquin Luken, Executive Director; Adriana Eguia, President; Richard Kiy, President; and Rafael Fernandez, Director, Center for U.S.-Mexican Studies.

During this segment, the key takeaways of the Cali-Baja Business Summit 2025 were summarized, highlighting the importance of translating the dialogue generated throughout the event into concrete actions that drive regional development. The session reinforced the need to maintain strong collaboration among stakeholders across the binational ecosystem, aligning efforts around shared strategic priorities.



Additionally, the foundations for the development of the Action Agenda 2026 were presented, aimed at advancing the initiatives, proposals, and opportunities identified during the summit. It was emphasized that this agenda should focus on key areas such as competitiveness, infrastructure, talent, innovation, and trade facilitation, with a strong emphasis on results and measurable impact.

Finally, it was noted that the true value of the summit lies in its ability to drive follow-through and execution, positioning it as a starting point for strengthening binational integration. In this context, the closing remarks reaffirmed the commitment of participants to advancing a more coordinated, competitive, and resilient Cali-Baja region capable of addressing the challenges of the global environment.

2.8 Networking Cocktail (5:00 – 6:00 PM)

8 Networking Cocktail

5:00 – 6:00 pm
Deutz Conference Room

Closing networking cocktail offering a relaxed space to connect, exchange ideas, and strengthen cross-border business relationships.

The event concluded with a networking session designed to strengthen professional relationships and foster new opportunities for collaboration among attendees. During this segment, a conducive environment was created for the exchange of ideas, the development of strategic connections, and the identification of potential business opportunities, allowing conversations initiated throughout the day to continue in a more dynamic setting.

Additionally, this closing activity facilitated interaction among representatives from the public sector, private industry, academia, and economic development organizations, contributing to the strengthening of the binational ecosystem and the establishment of valuable relationships for future joint initiatives within the Cali-Baja region.

3. General Conclusions

The Cali-Baja Business Summit 2025 reaffirmed the region's position as a highly competitive binational ecosystem, highlighting its ability to integrate talent, industry, and innovation within a strategic environment for North America. Throughout the event, a shared vision emerged among key stakeholders—including government, private sector, academia, and economic development organizations—centered on the need to strengthen cross-border collaboration as a fundamental driver of regional economic development.

The event enabled the identification of clear opportunities in strategic sectors such as advanced manufacturing, medical devices, electronics, technology, and logistics, which continue to drive growth and investment attraction in the region. In this context, nearshoring was recognized as an unprecedented opportunity to position Cali-Baja as a leading hub for manufacturing and innovation, provided it is supported by adequate infrastructure, a strong talent pipeline, and effective coordination across both sides of the border.

It was also acknowledged that the region's competitiveness depends largely on its ability to strengthen border infrastructure, optimize the movement of goods and people, and advance more efficient trade facilitation mechanisms. The modernization of border crossings, the implementation of technological solutions, and institutional alignment were identified as key factors to sustain economic dynamism and enhance the region's positioning relative to other global destinations.

Similarly, talent development and innovation were recognized as fundamental pillars for the future of Cali-Baja. Strong linkages between universities, research centers, and industry, along with the growing presence of technology and entrepreneurial ecosystems, enable the region to develop differentiated capabilities that strengthen its value proposition at the international level.

Finally, the event laid a solid foundation for the development of the Action Agenda 2026, establishing a framework to follow up on the priorities identified during the summit. In this regard, the Cali-Baja Business Summit 2025 went beyond its role as a forum for dialogue, consolidating itself as a strategic platform to align efforts, strengthen partnerships, and drive concrete initiatives that position the region as one of the most dynamic, integrated, and competitive binational regions globally.

Photo gallery:



SPECIAL THANKS

To our valued CO-SPONSORS:



We would like to extend our sincere gratitude for your unwavering support and commitment to making this binational summit a reality. This initiative stands as a testament to what can be achieved when vision is matched with collaboration across borders.

Without your partnership, this effort would not have been possible. Your engagement, trust, and shared purpose were instrumental in bringing together the ideas, people, and momentum that define this summit.

This is the true essence of a binational effort—where collaboration is not just an intention, but a commitment, and where collective action transforms ambition into impact.

Thank you for believing in this vision and for being an essential part of it.

Sincerely,

Tijuana Economic Development Corporation