

Decentralization and industrial policy in tension: challenges in the construction of a productive agenda in the province of Buenos Aires

Descentralización y política industrial en tensión: desafíos en la construcción de una agenda productiva en la provincia de Buenos Aires

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ABSTRACT

Introduction: from a subnational perspective, this paper analyzes industrial policy in the Province of Buenos Aires, based on the idea that productive strategies in Argentina are deployed in a heterogeneous manner across the territory. In a context of decentralization and redefinition of the role of the state, the province—the country’s historic industrial hub—has developed its own agenda aimed at sustaining and diversifying its productive matrix.

Development: the study focuses on two key instruments of Buenos Aires industrial policy: industrial parks, as a territorial planning tool with a consolidated institutional track record, and the pharmaceutical industry, defined as a strategic sector due to its link to innovation and health sovereignty. Using an exploratory-descriptive methodology based on regulations, official documents, and sector statistics, it is observed that industrial parks show a high degree of institutionalization and territorial capillarity, while the development of the pharmaceutical sector lags behind, revealing tensions between provincial capacities, sector dynamics, and coordination between levels of government.

Conclusions: the Buenos Aires experience reveals an industrial policy with solid territorial instruments, but with persistent challenges in promoting knowledge-intensive sectors. The main challenge is to articulate and deepen existing capacities in order to move towards a more integrated, innovative, and territorially balanced productive development.

Keywords: Industrial Policy; Province of Buenos Aires; Industrial Parks; Pharmaceutical Industry; Productive Development.

RESUMEN

Introducción: desde una perspectiva subnacional se analiza la política industrial en la Provincia de Buenos Aires, partiendo de la idea de que las estrategias productivas en Argentina se despliegan de manera heterogénea en el territorio. En un contexto de descentralización y redefinición del rol estatal, la provincia —histórico núcleo industrial del país— ha desarrollado una agenda propia orientada a sostener y diversificar su matriz productiva.

Desarrollo: el trabajo se centra en dos instrumentos clave de la política industrial bonaerense: los parques industriales, como herramienta de planificación territorial con una trayectoria institucional consolidada, y la industria farmacéutica, definida como sector estratégico por su vínculo con la innovación y la soberanía sanitaria. A partir de una metodología exploratoria-descriptiva basada en normativa, documentos oficiales y estadísticas sectoriales, se observa que los parques industriales muestran un alto grado de institucionalización y capilaridad territorial, mientras que el desarrollo del sector farmacéutico presenta mayores rezagos, evidenciando tensiones entre capacidades provinciales, dinámicas sectoriales y coordinación entre niveles de gobierno.

Conclusiones: la experiencia bonaerense revela una política industrial con instrumentos territoriales sólidos, pero con desafíos persistentes para impulsar sectores intensivos en conocimiento. El principal reto consiste en articular y profundizar las capacidades existentes para avanzar hacia un desarrollo productivo más integrado, innovador y territorialmente equilibrado.

Palabras clave: Política Industrial; Provincia de Buenos Aires; Parques Industriales; Industria Farmacéutica; Desarrollo Productivo.

INTRODUCTION

This paper explores how Argentine industrial policy, far from being a homogeneous process, unfolds unevenly across regions. Although federal instruments are promoted at the national level, in practice, there is a growing trend toward the subnational level, where provincial and municipal governments, in some cases, take an active role in implementing these strategies.^(1,2,3)

In this context, the Province of Buenos Aires—historically the industrial heartland of the country—has been developing its own production agenda to sustain and diversify its economic matrix amid state withdrawal and greater delegation to the private sector. From a perspective focused on decentralization and public policy, this study examines the role of the provincial government as an actor capable of defining strategic priorities, mobilizing development instruments, and organizing interventions in the productive fabric.^(4,5,6)

The study focuses on two dimensions: the development of industrial parks as a territorial planning tool and the promotion of the pharmaceutical industry as a strategic sector linked to health sovereignty. Although the province has managed to consolidate an institutional framework around industrial parks, the development of the pharmaceutical industry lags, highlighting the tensions between provincial capacities and sectoral dynamics.^(7,8)

To this end, an exploratory-descriptive methodology based on primary and secondary documentary sources is used, consisting of: national and provincial regulations (laws, decrees, and regulations), administrative programs and resolutions, technical reports, and official statistics related to the instruments, as well as specialized research, to observe how the Province of Buenos Aires defines the instruments of its current industrial policy.^(9,10)

This article is structured as follows: first, it defines and analyzes the concept of industrial policy to understand how its instruments work. Second, it addresses two of these instruments—industrial parks and the pharmaceutical industry—examining their current situation both nationally and in the Province of Buenos Aires. This analysis allows us to observe how the province, historically the nucleus of Argentine industrialization, deploys strategies to strengthen its productive matrix and promote knowledge- and innovation-intensive sectors, among which the pharmaceutical industry is in the process of development.^(11,12,13)

DEVELOPMENT

The province of Buenos Aires: its importance in Argentina's economic structure. The Province of Buenos Aires is the most densely populated territory in Argentina and the country's productive hub. It contributes more than a third of the national Gross Domestic Product and around 40 % of tax revenue, and is also home to half of Argentina's industrial apparatus.^(1,2) There are stark contrasts within the province: while the north of Buenos Aires and the Buenos Aires Metropolitan Area (AMBA) are highly industrialized and service-oriented, the interior remains predominantly agricultural.⁽²⁾

In terms of production, the province was a pioneer in promoting industrial activity from the late 19th and early 20th centuries, with a marked concentration in the AMBA⁽³⁾ Currently, the industrial sector accounts for 25 % of provincial employment, with branches such as Food and Beverages (6 %), Chemical Products (3 %), Metals (2 %), Rubber and Plastics (2 %), and Automotive (2 %). In addition, Buenos Aires exceeds the national average in the number of companies in the industrial sector: 1,34 per 1000 inhabitants, compared to 1,14 nationwide.⁽⁴⁾

In terms of foreign trade, Buenos Aires is the country's leading exporting province, accounting for USD 21,429 billion, equivalent to 36 % of Argentine exports. Its export basket is characterized by diversification: 47 % comes from agricultural products (primary and manufactured), 23 % from the automotive sector, and 14 % from chemicals.⁽⁴⁾ This composition reflects the combination of the historical agro-industrial base and more sophisticated industrial sectors.^(14,15,16)

As can be seen, the province of Buenos Aires is positioned as the economic and industrial heart of the country: a pioneer in industrialization policies, with a decisive structural weight in employment, exports, and productive diversification, but at the same time with a complex territorial structure where dynamic industrial hubs, strategic port areas, and rural municipalities with less development and diversification coexist.^(17,18,19)

Defining industrial policy

By industrial policy, we refer to the set of state actions aimed at transforming an economy's productive structure by selectively promoting sectors deemed strategic. Although there are various definitions, this research adopts Lavarello's⁽⁵⁾ definition: "a set of actions and instruments that seek to influence the productivity of the national economy through selective support for certain activities or sectors".^(20,21)

Unlike more restricted conceptions, Lavarello broadens the notion of industry beyond manufacturing to include related services and the set of activities that enable the transformation of research and development (R&D) results into new products, consumer goods, and services.^(22,23) This vision allows industrial policy to be understood as an instrument that enables the articulation of science, technology, and production, integrating manufacturing and knowledge-intensive service activities within a single productive framework, serving as a bridge between knowledge and consumption.⁽⁵⁾

From a complementary perspective, Chang⁽⁶⁾ argues that industrial policies are government actions that seek to develop productive and technological capacities in sectors deemed strategic to national development. For the author, selecting specific activities or branches—that is, choosing the winners—is an essential task of the state, aimed at strengthening those areas with the most significant potential to generate positive externalities.^(24,25)

In a broader sense, Juhász *et al.*⁽⁷⁾ define industrial policy as "government policies that explicitly aim to transform the structure of economic activity in pursuit of some public objective." These objectives may vary—from innovation, productivity, or economic growth to the promotion of employment, climate transition, or import substitution—but they always presuppose an active role for

the state in guiding structural change.^(26,27)

In this paper—based on the contributions of Lavarello⁽⁵⁾, Chang⁽⁶⁾, and Juhász et al.⁽⁷⁾—industrial policy is understood as a government policy aimed at transforming the productive structure through the selection of instruments designed to strengthen strategic sectors that articulate innovation, knowledge, and territorial development. This approach is particularly relevant for analyzing industrial policy in Buenos Aires, as the province plays an active role in developing its own instruments and strategies within a heterogeneous federal framework.^(28,29)

It is important to note that the history of Argentine industry is, to a large extent, the history of the Province of Buenos Aires: it was in its territory that the first production centers were established and the infrastructure that sustained the national industrialization process since the late 19th century was developed.⁽³⁾

From this perspective, Buenos Aires' industrial policy combines territorial instruments and sectoral strategies.⁽³⁰⁾ Industrial parks act as tools for planning and productive organization, while the selection of strategic sectors, such as the pharmaceutical industry, guides development toward knowledge- and innovation-intensive activities.⁽³¹⁾ Despite its economic relevance, this sector is still in its infancy, consolidating itself as an emerging component of the provincial industrial matrix. The following sections will analyze the current situation of both instruments at the national level and in the Province of Buenos Aires.^(32,33)

Industrial parks in the province of Buenos Aires

Industrial parks are a policy with more than fifty years of history in the Province of Buenos Aires.⁽³⁴⁾ Not only was it a pioneer in establishing the first of this type—followed by Córdoba and Santa Fe—but it is also currently the jurisdiction with the most significant number of industrial parks in the country, consolidating itself as a benchmark in the planning and promotion of these productive spaces.^(35,36)

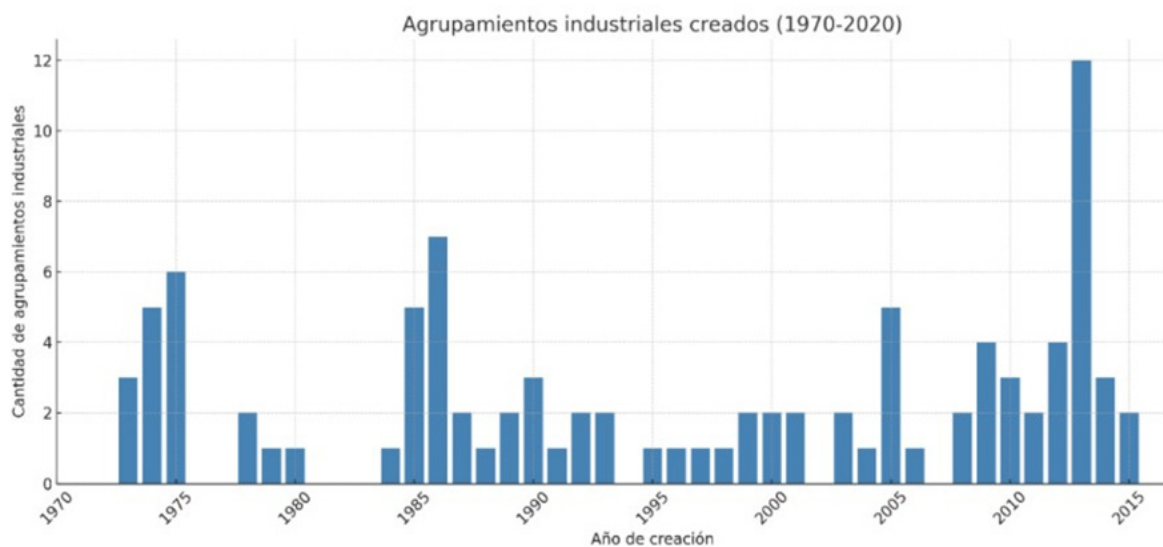


Figure 1. Industrial parks in the province of Buenos Aires

The first industrial parks in the province of Buenos Aires were created in the 1970s: Chivilcoy, Olavarría, Bahía Blanca, and Pilar.⁽³⁷⁾ Their creation took place during a period of decisive state intervention, characterized by policies of industrial decentralization, expansion of energy and transportation infrastructure, and diversification of exports.⁽⁸⁾ This stage coincided with the so-called entrepreneurial State, in which basic industries (steel, petrochemicals, automotive, forestry, and fishing) were promoted, and the Industrial Promotion of Companies Act No. 14,781 was enacted.⁽⁹⁾

In this context, the 1969-1971 Three-Year Plan prioritized the creation of industrial growth hubs, with projects such as the Olavarría-Tandil industrial park and the expansion of road and electrical infrastructure.^(38,39) Subsequently, the 1970-1974 Five-Year Plan consolidated this policy by planning new industrial areas, including the Quequén and Mar del Plata parks, as well as studies for the installation of food industries.⁽⁸⁾ However, many of these initiatives were cut short after the 1976 dictatorship, which abandoned the import substitution model and, under state repression, established a neoliberal scheme based on financial valuation and public spending adjustments.⁽¹⁰⁾

Nevertheless, as shown in FIGURE No. 1, despite the country's deindustrialization, the creation and approval of industrial parks continued.^(40,41) At the regulatory level, the policy was institutionalized by Decree-Law No. 7982/1972, which defined industrial parks in Article 1 as «any subdivision of land developed in accordance with a plan approved by the Executive Branch for use by a group of industrial companies, equipped with infrastructure and common services.»^(42,43) The regulation gave the State an active role in the purchase of land, infrastructure, and services, in providing technical assistance, and even in the power of expropriation. This legal framework was repealed by Decree-Law No. 10,119/1983, later replaced by Law No. 13,744/2007, currently in force with amendments introduced by Law No. 14,792/2015. These reforms sought to simplify procedures and expand benefits to promote industrial clusters.^(44,45)

Currently, the legislation recognizes six categories of industrial clusters: a) industrial parks, b) planned industrial sectors, c) industrial and logistics service areas, d) business incubators, e) modular production units, and f) small and medium-sized industrial parks. According to data from the province's Ministry of Production, Science, and Technological Innovation, the most widespread categories are Planned Industrial Sectors (SIP) and Industrial Parks.⁽¹¹⁾

In terms of incentives, Law No. 13,656/2007 established a tax benefit regime (exemptions on gross income, real estate, motor vehicles, and stamps) for companies located in industrial clusters. This regime was replaced in 2024 by Law No. 15,510, which created the Provincial Strategic Investment Regime, expanding tax benefits and modulating their duration based on investment amounts and territorial factors, such as location in low-income areas or industrial parks. The new regulation respects the benefits already granted under the previous regime until their expiration.^(46,47) The implementation and creation of industrial clusters as shown, the implementation of the industrial cluster policy depends on local governments' decisions. Although it is a program created by the province of Buenos Aires, it can only be implemented through municipal management. In addition, its implementation requires the interaction of different public actors (the state, universities, research organizations) and the private sector.^(48,49)

The interaction among different actors, while enriching perspectives, also means that 135 distinct ways of conceiving and managing the creation of industrial clusters coexist in the province.^(50,51) This diversity is further amplified by the variety of instruments that comprise industrial policy and the complexity of coordinating multiple subsystems in a federal context.

From an economic perspective, each system represents a cost or a barrier to market entry. One does not need in-depth knowledge of the Buenos Aires territory to notice that its productive fabric is highly heterogeneous, with municipalities, areas, and regions exhibiting a productive diversity that has been structured and consolidated over time.⁽²⁾

Since the 1990s, decentralization in Argentina has transferred numerous responsibilities to the municipal level, including the management of social and productive problems.^(13,14) Thus, municipalities ceased to be mere providers of basic services—as established by the Buenos Aires Constitution and the Charters—and took on an active role in promoting local economic development through policies to support entrepreneurs, human resources training, strategic planning, business incubation, and the promotion of the social economy.⁽¹⁵⁾ However, this functional expansion was not accompanied by absolute financial autonomy: most municipalities continue to depend on provincial or national transfers, as their own resources are mainly limited to municipal tax collection.⁽¹⁴⁾

Although it is positive that municipalities have the power to create industrial clusters, the lack of tax autonomy and limited financing options make it challenging to undertake infrastructure projects that require millions of dollars in investment.^(52,53)

Strategic sectors within the province of Buenos Aires

In addition to territorial instruments such as industrial clusters, Buenos Aires' industrial policy incorporates a sectoral dimension aimed at promoting strategic activities that diversify the productive matrix and consolidate development with greater technological content and added value.^(54,55)

These specific regimes seek to strengthen sectors with potential for innovation, skilled employment, and provincial identity, while expanding the State's presence in promoting value chains with regional impact. Currently, some of the regimes in place in the Province of Buenos Aires are as follows:

- Law 15,404 on the Promotion and Incentive of Wine Production in Buenos Aires: Regulated by Governor Axel Kicillof through Decree 517/2023, this law creates a promotion and incentive scheme for the wine industry in Buenos Aires, with the aim of strengthening this activity in its social, economic, productive, environmental, and cultural dimensions.

The law creates the Provincial Registry of Vineyards and Wineries and launches the “Vino Buenos Aires” brand to identify and position wines produced in the province. This brand must be included on the label or through an official stamp. In addition, the law empowers the Executive Branch to: a) grant incentives for new vineyards and wineries; b) provide technical, logistical, and economic assistance to producers; c) promote the activity through publicity campaigns and agreements with public and private organizations; and d) consolidate a Buenos Aires wine identity, facilitating access to national and international markets and competitions.^(56,57)

- Law 15,339 on Adherence to the Knowledge Economy Promotion Regime: (Regulated by Decree 1573/2022). This law adheres to the National Knowledge Economy Promotion Regime (Law No. 27,570/2019), with the aim of promoting activities based on the intensive use of knowledge, technological development, and innovation, strengthening the productive fabric and generating skilled employment with a federal and sustainable perspective (Law 15,339, Articles 1 and 2).

Interested companies must register with the Knowledge Economy Node Registry (NECo), which acts as the regime's admission and control system. Once registered, they can access partial exemptions from gross income tax, depending on the size of the company (micro, small, medium, or large).⁽⁵⁸⁾ Article 12 of the regulation also provides that the Executive Branch may grant special benefits to technology hubs, parks, or districts that implement technological or educational innovations, develop sustainable lines of credit, or incorporate gender- and inclusion-focused policies. In addition, the creation of the Provincial Fund for the Promotion of the Knowledge Economy is provided for, to be financed by proceeds from non-exempt taxes. This fund will be used for training, research, technical assistance, strengthening local capacities, and coordination with the scientific-technological system (Law 15,339, arts. 8 and 9).⁽⁵⁹⁾ The province complements this agenda with the Provincial Strategic Investment Regime (Law 15,510; Decree 2938/2024), which directs incentives toward sectors defined as strategic: manufacturing, services—particularly logistics and tourism—cultural industries, natural resource-intensive activities (mining, energy, oil, and gas), and automotive. Finally, the province is committed to developing renewable energy.^(16,17)

Pharmaceutical industry

In Argentina, the problem of access to medicines became more relevant after the political, economic, health, and social crisis that our country suffered in 2001.⁽⁶⁰⁾ Upon declaring a health emergency under Decree No. 486/02, the national government implemented a series of measures to guarantee access to medicines for the population. Within this framework, public production of medicines (PPM) became increasingly important for two specific reasons: on the one hand, it represented a strategy aimed at improving conditions of access to medicines and, on the other, it would allow for the development of local capacities in terms of research and production.⁽¹⁸⁾

Although Argentina has a long history of implementing a PPM policy dating back to the early 19th century, Piñeiro *et al.*⁽¹⁹⁾ divide it into two periods: a first stage from 1916 to 2001, which gave little importance to PPM as a state instrument, and public laboratories emerged as a result of the social need to guarantee access to medicines. The scarcity and discontinuity of public policies led each laboratory to define its own roadmap, thus generating jurisdictional heterogeneity and significant differences in budgets and production capacities. In a second stage, from 2002 to 2019, policies and regulations were consolidated to institutionalize health as a social good, thereby strengthening PPM as a key tool.⁽⁶¹⁾

Regarding the characteristics of the drug production sector, it is important to note its federal distribution. By 2015, there were 39 drug production units based in the Autonomous City of Buenos Aires and in 10 provinces: Buenos Aires, Córdoba, Santa Fe, Tucumán, Corrientes, Chaco, San Luis, Misiones, Río Negro, and Formosa.⁽²⁰⁾

Half of the provinces in our country have at least one public drug production unit, indicating installed capacity at the regional level. However, not all regions of the country are equally represented in terms of PPM.⁽⁶²⁾

The uneven distribution of industrial laboratories and hospital pharmacies is a recurring feature of the sector, which has adverse effects on the scope of PPM. In addition, the federal transit of drug production requires ANMAT approval, as the regulatory body for the activity.⁽⁶³⁾ This means that the main requirement in this regard is that production plants must be authorized in accordance with the standards and conditions set by this agency.^(18,20)

On the other hand, due to the heterogeneous geographical distribution of production units, some laboratories established supply and exchange networks that enable them to supply medicines to other provinces.⁽⁶³⁾ For example, the Laboratorio Industrial Farmacéutico (LIF) SE in Santa Fe established agreements with public hospitals in Entre Ríos and with other laboratories in the province of Río Negro.⁽⁶⁴⁾ It is worth noting that some provinces have their own laws on medicines and approve and register their own products, which means their marketing is limited to the provincial level. Of the 29 public industrial laboratories, only nine have their plants approved by ANMAT.⁽⁶⁵⁾ In terms of geographical distribution, these nine are located in CABA (1), the province of Buenos Aires (2), Santa Fe (2), Córdoba (1), San Luis (1), Misiones (1), and Formosa (1).⁽⁶⁶⁾

The pharmaceutical industry in the province of Buenos Aires

The pharmaceutical industry is one of the strategic sectors within the productive structure of Buenos Aires. Its relevance is explained by both its capacity to generate scientific and technological knowledge and its impact on public health and the creation of quality employment.

Structurally, the Argentine pharmaceutical industry comprises 424 companies and 1098 establishments (2022), with a high concentration in the Buenos Aires Metropolitan Area, particularly in the Buenos Aires suburbs. Key municipalities such as Vicente López, San Isidro, Pilar, Escobar, Avellaneda, Malvinas Argentinas, and General San Martín are located there, accounting for the largest share of employment and production plants.⁽²³⁾

The sector's production dynamics are significant: between 2016 and 2023, production grew by 5,4 %, albeit with ups and downs, while employment expanded by 8,8 %. The Province of Buenos Aires combines two complementary dimensions:

- On the one hand, public production of medicines as an instrument of industrial and health policy, aimed at equitable access;
- On the other hand, a highly dynamic private complex, concentrated in the suburbs, which articulates with scientific-technological value chains and has a growing export profile.

This makes the pharmaceutical industry a distinct instrument of industrial policy, different from industrial parks in its sectoral logic, but convergent in its objective of diversifying the productive matrix and strengthening the province's technological autonomy.⁽⁶⁷⁾

Currently, the province of Buenos Aires seeks to strengthen public drug production (PPM) through the work of the Tomás Perón Biological Institute and the creation of the Buenos Aires Pharmaceutical Industry Center (CIFAB)

The Dr. Tomás Perón Biological Institute (IBTP) (under the Ministry of Health of the Province of Buenos Aires) functions as the leading provincial actor for the production of biologicals and medicines—vaccines, serums, antitoxins, oral formulations, and quality control—with a focus on ensuring public supply, health sovereignty, and supply for provincial programs (e.g., PRODIABA). The National University of La Plata (UNLP) and the Scientific Research Commission of the Province of Buenos Aires (CONICET) collaborate as scientific-technological partners to develop technologies and formulations on a production scale. PRODIABA). The National University of La Plata (UNLP) collaborates as a scientific and technological partner to develop technologies and formulations on a production scale. At the same time, the Scientific Research Commission of the Province of Buenos Aires (CIC) acts as a funding agency and institutional coordinator in networks and agreements that promote joint projects. Among the strategic functions of the IBTP at the provincial level, the following stand out:

- Production of vaccines, serums, and biological products that supply hospitals and provincial programs, including products that are not always covered by the private industry.

- Manufacture of oral and sterile medicines (e.g., agreements to produce gliclazide and metformin for provincial programs).
- Quality control, registration, and licensing of manufacturers and products at the provincial level.

As for the creation of the Buenos Aires Pharmaceutical Industry Center (CIFAB), promoted by the provincial Ministry of Health, it was approved by the Chamber of Deputies on December 10, 2024, and although its consideration is delayed in the Senate, it is expected that it will obtain final approval with the new legislative composition after the change of authorities.

This project represents a milestone in provincial industrial and health policy, aimed at transforming the current IBTP into a Public Limited Company with Majority State Participation (SAPEM). Its objective is to develop, produce, and research medicines and medical supplies intended mainly for the public health system.

This initiative comes at a time of increasing difficulty in accessing medicines, due to sustained price increases and high corporate concentration in the pharmaceutical sector. According to Health Minister Nicolás Kreplak, the launch of the center will increase production scale, reduce costs, and advance toward greater health sovereignty, guaranteeing the provision of quality medicines at affordable prices for the entire population of Buenos Aires.⁽²⁴⁾

From an institutional point of view, CIFAB will adopt a mixed structure, with 51 % of the capital held by the provincial government and the remaining 49 % allocated to private actors with proven experience in the field, under strict participation limits. This configuration seeks to combine public planning with business efficiency, ensuring that production is primarily allocated to the supply of provincial and municipal health services.⁽²⁴⁾

The new center is expected to meet the treatment needs of 45 % of Buenos Aires' population, which has only public health coverage. The motivations behind this initiative are part of a comprehensive strategy: to guarantee equitable access to essential medicines, reduce costs through private intermediation, promote research and technological development, and strengthen provincial health sovereignty. In this way, CIFAB is emerging as a key subnational instrument within Buenos Aires' industrial policy, articulating public production, innovation, and equity in access to health.⁽²⁵⁾

CONCLUSIONS

This study showed that the province of Buenos Aires has built a solid and sustained institutional framework for industrial policy, with decades of continuity in the use of industrial parks/clusters as instruments of territorial planning. This strength, however, coexists with a structural debt: the Buenos Aires pharmaceutical industry remains fragmented, with little coordination between existing public capacities and technological and scaling challenges. Public drug production and the creation of CIFAB are important advances, but they have not yet systematically integrated planning, R&D, suppliers, and public procurement.

Buenos Aires' industrial policy is at a turning point. Although it has managed to consolidate solid territorial tools, it needs to reorient them towards knowledge-intensive sectors. The challenge is not to create new instruments, but to transform existing ones into real technological and productive capacity, rooted in the territory and with a more decentralized logic. Defining this path will set the course for Buenos Aires' industrial policy in the coming years.

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None.

CONFLICT OF INTEREST

The authors declare that there is no conflict of interest.

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