

MEDIA INFLUENCE MATRIX

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AUTHORS

RODRIGO GÓMEZ

ARGELIA MUÑOZ

JUAN LARROSA FUENTES

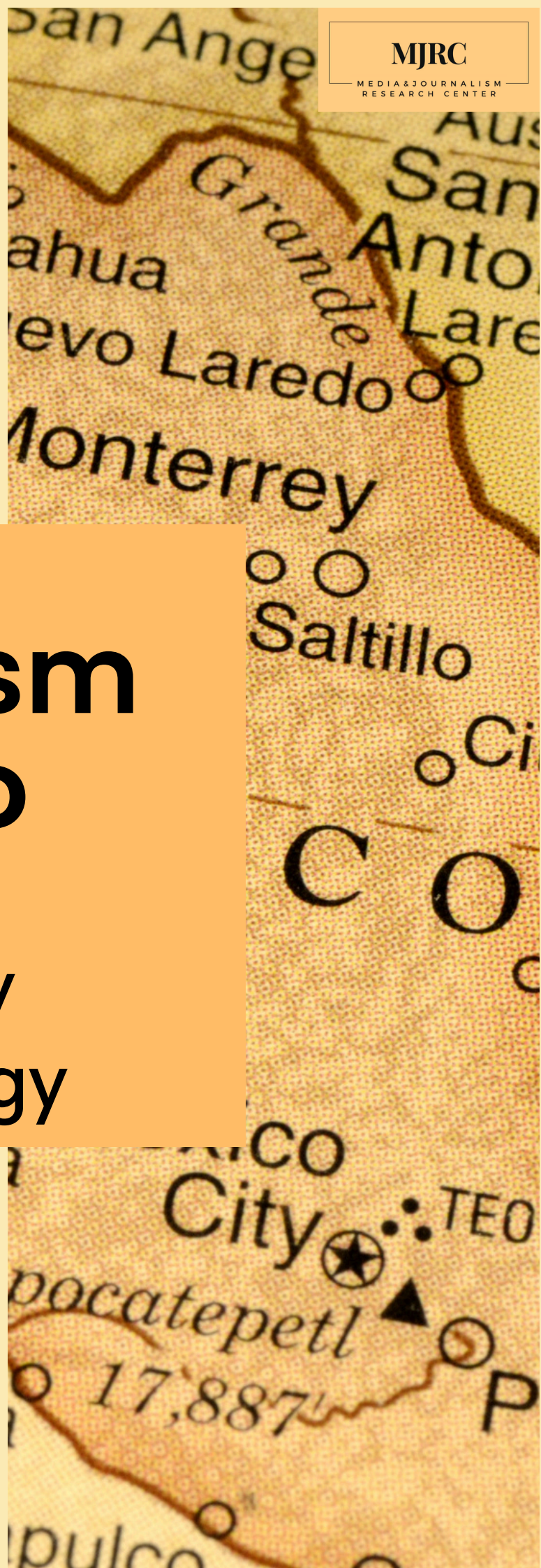
GABRIEL SOSA-PLATA

Journalism in Mexico

Politics, Money and Technology

Editor

Marius Dragomir



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Tartu mnt 67/1-13b, 10115, Tallinn, Harju Maakond, Estonia
6 South Molton St, London, W1K 5QF, United Kingdom

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OBSERVACOM (Latin American Observatory of Regulation, Media and Convergence) is a regional think tank specializing in regulation and public policies related to the media, telecommunications, the internet and freedom of expression. OBSERVACOM addresses these issues from a rights perspective, focusing on access, diversity and pluralism. OBSERVACOM brings together experts and researchers committed to the protection and promotion of democracy, cultural diversity, human rights and freedom of expression in Latin America and the Caribbean.

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The University of Santiago de Compostela (USC), founded in 1495, is one of the world's oldest public universities and has two campuses in the cities of Santiago de Compostela and Lugo, in Galicia (Spain). The USC partner in this project is the research group Novos Medios, which is part of the USC's Department of Communication Sciences. Novos Medios specializes in studying the relationship between technology and media, as well as the changes that affect today's journalism in terms of audiences, funding, innovation and public service.

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Authors

Rodrigo Gómez is a professor of communication studies and policies at the Universidad Autónoma Metropolitana (UAM), Cuajimalpa campus. His work is focused on cultural fields, media systems, media politics, and media business from a political economy of communication perspective. He is co-editor of Routledge's Global Media Giants book series.

Argelia Muñoz Larroa has a Conacyt Postdoctoral Fellowship at Universidad Autónoma Metropolitana, Cuajimalpa campus in Mexico City. She focuses on studying the sustainability of cultural sectors with a view to building a comprehensive analytical framework to guide public policies aimed at fostering regional economic development and cultural diversity. She has a doctorate in administration from the Victoria University of Wellington in New Zealand, a master's degree in international relations and a degree in history from the National Autonomous University of Mexico (UNAM). Argelia has published in the International Journal of Communication, Political Economy of Communication, North America, Journal of Digital Media and Policy, Media Industries, Studies in Australasian Cinema, among others.

Juan S. Larrosa-Fuentes has a BA, a MA, and a PhD from ITESO, the University of Guadalajara, and Temple University, respectively. He was a professor in all these three institutions. Juan is currently a full-time professor in the Department of Sociocultural Studies at ITESO and a member of the National System of Researchers. Since 2020 he has been the general coordinator of ETIUS: communication and culture observatory. He has published in the Latin American Research Review, International Journal of Communication, Media, War & Conflict, Tripodos, Comunicación y Sociedad, and Global Media Journal México. In addition, he is co-author, along with Sofía Paláu, of the book Manual for Media Observation (ITESO, 2014), as well as author and coordinator of several books on political communication. His research is focused on theoretically and empirically studying public and political communication.

Gabriel Sosa Plata is the Ombudsman of the public broadcaster Canal 22. He is a journalist, academic and researcher specialized in public communication policies and also a professor and researcher at the Autonomous Metropolitan University (UAM), Xochimilco Unit. Former General Director of Radio Education, he has published academic essays in more than 20 domestic and foreign collective books. Author of the books *Días de Radio* (Secretaría de Cultura y Tintable, 2016 and 2021), *Technological innovations of radio in Mexico* (Fundación Manuel Buendía, 2004), co-author of the books *Las mil y una radios* (McGraw-Hill, 1997) and *Digital Media: Mexico* (Open Society, 2011). He has been the President of the Inter-American Organization of Ombudsmen (OID), Ombudsman of the University System of Radio and Television of the University of Guadalajara, former Ombudsman of the radio broadcaster Noticias MVS and former mediator of the Mexican Institute of Radio (IMER). He was a member of the Advisory Council of the Federal Institute of Telecommunications (IFT). He hosts the Media 20.1 program on TV UNAM.

Editor

Marius Dragomir is the Founding Director of the Media and Journalism Research Center (MJRC). He previously worked as director of the Center for Media, Data and Society at CEU in Budapest. Before, he worked for the Open Society Foundations (OSF) for over a decade where he managed the research and policy portfolio of the Program on Independent Journalism (PIJ), formerly the Network Media Program (NMP), in London. He has also been one of the main editors for PIJ's flagship research and advocacy project, Mapping Digital Media, which covered 56 countries worldwide, and he was the main writer and editor of OSF's Television Across Europe, a comparative study of broadcast policies in 20 European countries.

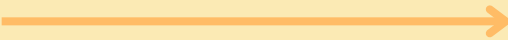
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Proofreading: **Theodore Southgate**

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Executive Summary

Mexico's regulatory environment for media and telecommunications is complex and has been shaped by significant legal reforms, notably the 2013 constitutional reform that established the Federal Institute of Telecommunications (IFT). The IFT was established as an autonomous entity with the responsibility of regulating broadcasting and telecommunications, with a mandate to promote competition and ensure diversity in the telecommunications and media Mexican system. Despite these efforts, the market remains highly concentrated, with dominant players like América Móvil and Grupo Televisa maintaining substantial control over the telecommunications and broadcasting sectors, respectively.

Mexico's regulatory framework is facing significant challenges, particularly in the areas of political interference and jurisdictional conflicts between regulatory bodies. The Federal Institute of Telecommunications (IFT), which was established to oversee competition and regulate the telecommunications and broadcasting sectors, has faced increasing scrutiny regarding its independence.

Following the enactment of the 2014 Federal Telecommunications and Broadcasting Law (LFTR), which curtailed some of the IFT's powers, this scrutiny intensified. Furthermore, the administration of the President Andrés Manuel López Obrador (AMLO), which ended on 1 October 2024, indicated a desire to reduce the IFT's role, proposing to transfer its responsibilities back to the Ministry of Communications. Such a move would not only jeopardize the operational efficiency of the regulatory framework but also the progress made toward ensuring a competitive and diverse media system in Mexico. The potential dismantling of the IFT could reverse years of regulatory advancements, making it more challenging to enforce competition laws, protect audiences, promote public media, and maintain the independence of the media.

Furthermore, the absence of a dedicated regulator for internet content and the outdated Press Offense Act underscores the regulatory gaps in addressing contemporary challenges such as content moderation, misinformation, and digital rights. The aforementioned regulatory shortcomings have permitted the ongoing consolidation of media ownership and the continuation of practices that impede freedom of expression in Mexico.

The Mexican media industry is dependent on two principal sources of funding: public financing and commercial advertising. Public funding is derived from government budgets at the federal, state, and municipal levels, as well as from various autonomous bodies.

This funding frequently takes the form of official advertising, whereby the government purchases space in media outlets for the dissemination of its messages. This practice has, however, prompted concerns about media independence, as it often results in favorable coverage of government activities in exchange for financial support. Despite the AMLO administration's intention to reduce public spending on media, the allocation of these funds remains opaque and concentrated among a few major media outlets.

Another significant source of revenue for the media is commercial advertising, which is driven by the need to attract large audiences. However, the growth of digital platforms has resulted in a significant shift in advertising revenue away from traditional media outlets, placing additional financial pressure on the industry. Some digital media outlets have adopted alternative revenue models, such as paywalls and memberships, to maintain operational sustainability.

The historical context of media funding in Mexico is defined by a semi-authoritarian political system that dominated much of the 20th century. During this period, the government exercised substantial control over the press through financial means. This legacy continues to impact the media landscape, with numerous outlets reliant on state funding, which may potentially compromise their editorial independence. The convergence of technology and journalism in Mexico offers both prospects and challenges. On the one hand, technological advancements have enabled greater access to information and facilitated investigative journalism. The digital era has also enabled journalists to uncover significant corruption scandals, thereby promoting public accountability. However, the emergence of global digital platforms has disrupted traditional media business models, resulting in a decline in advertising revenues for local news outlets.

Furthermore, the extensive use of surveillance technology, such as the Pegasus spyware, has given rise to significant concerns regarding privacy and the security of journalists, activists, and political figures. These technologies, often deployed by both state and non-state actors, have been used to monitor and intimidate individuals who express criticism of the government, thereby impeding freedom of the press.

Furthermore, the Mexican technological landscape is characterised by considerable disparities in access to digital services. While urban areas have seen substantial improvements in internet penetration, rural regions lag far behind, which has the effect of exacerbating social inequalities. Despite the introduction of public policy initiatives such as the "Internet for All" program, the desired impact has yet to be achieved. This is due to a lack of resources and implementation challenges.

The dominance of a few global tech giants in the Mexican digital market has introduced further complexity to the media environment, as these companies control key platforms for content distribution and advertising. This concentration of power has implications for the financial viability of local media and the diversity of voices in the public sphere.

Media and Journalism in Mexico: Future Outlook

Despite notable developments in the media and telecommunications sectors, Mexico continues to confront persistent challenges that could impact the sustainability and autonomy of its media system. The reliance on public funding and the influence of commercial advertising continue to present challenges to maintaining editorial independence, particularly in an environment where political interference remains a concern. Despite their good intentions, regulatory bodies like the IFT are often constrained by political pressures and legal constraints, which limits their effectiveness in promoting competition and diversity.

The rapid technological changes present both opportunities and challenges for the media industry. On the one hand, they have democratized access to information and empowered investigative journalism. On the other hand, they have disrupted traditional media revenue models and introduced new threats to press freedom. The consolidation of digital power among a few global tech giants has further exacerbated these issues, reducing the financial viability of local media and limiting the diversity and plurality of voices in the public sphere.

To address these challenges, a comprehensive approach is required that includes strengthening regulatory frameworks, ensuring the independence of the media, promoting digital literacy and public media, as well as bridging the digital divide. Without a unified strategy in these areas, the Mexican media industry may continue to face financial challenges, editorial compromises, and a loss of public trust.



Chapter 1

Government, Politics and Regulation

Legal Overview

Mexico is a federal, democratic, presidential and secular republic made up of 32 federative states, governed by a Constitution that has been in force since 1917 and amended multiple times.

Laws and regulations emanate from it and the country’s political system is based on the principle of separation of powers between the executive power (consisting of the president, state governors, municipal presidents, mayors and their cabinets), the legislative power (consisting of local and federal deputies and senators) and the judiciary (consisting of several institutions and headed by the Supreme Court of Justice of the Nation).

The Mexican political system also includes autonomous constitutional bodies^[1] whose autonomy is justified by the need for technical and administrative specialization^[2].

The regulatory and public policy framework for the media in Mexico is built on an institutional infrastructure whose parts are in constant interaction and which is shaped by its relationship with civil society and the private sector. The media system in Mexico is also governed by international frameworks, such as human rights and trade treaties^[3].

For decades, the media system in Mexico has been faced with two key structural problems: high levels of market concentration and clientelistic practices as part of a system of mutual benefits between the political power on the one hand, and private businesses and media players on the other.

The former has hindered the development of universal coverage in telecommunications and broadcasting as well as access to plural sources of information, thus violating the rights of citizens to freedom of expression and access to information.

Furthermore, widespread drug trafficking and organized crime, and their relationship with the State since 2006, have led to an environment of extreme violence towards journalists in the country.

[1] The other autonomous constitutional bodies are: Bank of Mexico, National Commission of Human Rights (Comisión Nacional de Derechos Humanos, CNDH), Federal Economic Competition Commission (Comisión Federal de Competencia Económica, Cofece), National Council for Evaluation of Social Development Policy (Consejo Nacional de Evaluación de la Política de Desarrollo Social, Coneval), Attorney General of the Republic (Fiscalía General de República, FGR), National Electoral Institute (Instituto Nacional Electoral, INE), National Institute of Geography and Statistics (Instituto Nacional de Geografía y Estadística, Inegi), National Institute of Transparency, Access to Information and Protection of Personal Data (Instituto Nacional de Transparencia, Acceso a la Información y Protección de Datos Personales).

[2] See Filiberto Valentín Ugalde Calderón, “Órganos constitucionales autónomos”, Revista del Instituto de la judicatura Federal escuela judicial, 2010, 29, 253–264.

[3] Supreme Court of Justice of the Nation (Suprema Corte de Justicia de la Nación, SCJN), Derechos humanos contenidos en la constitución y en los tratados internacionales. Gaceta del Semanario Judicial de la Federación. 25 April 2014. <https://sjf.scjn.gob.mx/SJFSem/Paginas/Reportes/ReporteDE.aspx?idius=24985&Tipo=2>

A series of reforms in the last 20 years and, in particular, the constitutional reform of telecommunications in 2013, the central theme of this report, have been the result of pressure from civil society, academia and political actors.

In the context of the structural problems mentioned above, these reforms have brought about regulatory advances in:

- a) economic competition
- b) convergence and investment
- c) coverage and access
- d) plurality and cultural diversity (i.e., public and community media)
- e) human rights (access to information and freedom of expression, health, education).

However, there are still challenges, delays and inertia that represent a barrier to reaching the objectives of the 2013 constitutional reform, as well as other reforms aimed at democratizing communication and guaranteeing the rights to freedom of expression and information.



Regulatory Landscape

The constitutional reform of 2013 and the secondary laws of 2014

The 2013 constitutional reform was partly a result of pressure from civil society organizations that fight for the democratization of the media in Mexico[4].

The product of a political agreement between the three most prominent political forces at the time: the party in power, the centrist Institutional Revolutionary Party (PRI), the National Action Party (PAN, from the right) and the Party of the Democratic Revolution (PRD, from the left), the reform was known as the Pact for Mexico, a joint commitment to carry out a series of structural reforms. The Pact for Mexico, however, also meant the continuity of corrupt[5] practices[6], a lack of transparency, and different forms of press censorship[7].

As part of the reform, the Federal Telecommunications and Broadcasting Law (LFTR) was enacted in 2014, replacing the Federal Broadcasting Law (1960) and the Federal Telecommunications Law (1995).

The LFTR recognized telecommunications and broadcasting as public services of general interest for the first time, in addition to creating specialized courts focused on those matters, and a new autonomous constitutional body in charge of regulating economic competition in the telecommunications and broadcasting sectors.

As part of the legal framework instituted by the reform, the Federal Law of Economic Competition (LFCE) was also issued the same year, guaranteeing autonomy for another body that has regulatory powers in the broadcasting sector, namely the Federal Economic Competition Commission[8].

However, these institutions are still not immune to political influence or independent from private interests.

[4] Rodrigo Gómez, "El rol del Estado en el Sistema de Medios Mexicano 2013-2018. Punto de partida para una agenda de investigación", *Comunicación y sociedad*, 2020, 17, e7565, 1-29.
 [5] Such as cases of bribes from the Odebrecht company to several lawmakers to approve the energy reform as part of the Pact for Mexico: Cristian Márquez Romo, "Odebrecht en México: anatomía de una trama", *Política Exterior*, 8 September 2020. <https://www.politicaexterior.com/odebrecht-en-mexico-anatomia-de-una-trama/>
 [6] Transparency International. (2019). *Corruption Perceptions Index 2018*. <https://www.transparency.org/cpi2018#downloads>
 [7] Article 19 (2019). *Democracia simulada, nada que aplaudir*. https://articulo19.org/wp-content/uploads/2018/03/INFORMEA19-2017_v04.pdf
 [8] Clara-Luz Alvarez, "Mexican Telecom Reform: Private Interest First?", *Mexican Law Review*, 1(15), 2015. doi:<http://dx.doi.org/10.1016/j.mexlaw.2015.12.003>; Andre Dorcé, Aimée Vega Montiel, Raúl Trejo Delarbre, Patricia Ortega Ramirez, "Telecommunications and Broadcasting Reform in Mexico in 2013: Key Elements of the Process", *Critical Studies in Media Communication* 31(5), 2014, 356-64;

The most important provisions introduced by the reform in telecommunications and broadcasting include:

1) The recognition of the fundamental rights of the audiences and users (including the creation of the ombudsman for audiences) to access to information, the media, digital networks and accountability.

2) Provisions securing at least 10% of the frequency spectrum for social use both in telecommunications and broadcasting (practically, guaranteeing access to community media).

3) The establishment of the Public Broadcasting System of the Mexican State (SPR) to provide impartial information, space for independent production, and plurality of ideas.

4) In broadcasting, the rules on broadcast licensing were democratized and made transparent; the transition to digital television was planned and scheduled; time limits on advertising on radio and television as well as must-carry and must-offer rules for pay television were established; and foreign investment in broadcasting was legalized (49% of the total shares in a company for broadcasting and 100% for telecommunications, as long as there is reciprocity with the investors' countries of origin).

5) The establishment of more efficient mechanisms to regulate competition in telecommunications and broadcasting. The reform introduced, for example, the concept of economic dominance for media with a nationwide penetration greater than 50% (measured mainly by the number of users, subscribers, size of audience, network traffic or by the network capacity used).

To conclude, the reform significantly revamped the institutional design of the Mexican State as both regulator and operator of the radioelectric spectrum, broadband and networks[9].

[9] Salvador De León Vázquez, "Desafíos en la protección de la libertad de expresión en México: 20 años de avances con pobres resultados", *Pangea. Revista de Red Académica Iberoamericana de Comunicación*, 11(1), 2020, 46-60; Wendy Dinora Huerta-Espino, Jesús Becerra-Villegas, "La reforma del sector de telecomunicaciones en México: una lectura desde el paradigma de la complejidad", *Razón y Palabra*, 20(95), 2016, 487-512.

Rights

Right of access to ICTs and content

Through the constitutional reform laws, the right to access information and communication technologies, broadcasting, and telecommunications services, including broadband and Internet, was enshrined in article 6[10].

However, the recognition of broadband access as a fundamental right by the Constitution posed a series of challenges because of the deficit of technological infrastructure. This is due mainly to high market concentration, where broadband is unequally distributed in the different regions of the country, with large areas in the north and south lacking coverage or served by a single operator[11].

The Mexican State resumed playing a key role in the deployment of networks and in promoting competition between private companies on the market. The reform created the legal framework to build two telecom networks through a public-private partnership scheme[12]:

1) Red Troncal (public tender was launched in 2018) was conceived as a wholesale fiber network designed to provide services to telecommunications dealers and marketers to increase their coverage. The plan was to use 38,000 kilometers of fiber optic owned by the Federal Electricity Commission (CFE) and operated by the Telecomunicaciones de Mexico (Telecomm). However, the project was canceled in 2019 by the then newly-elected administration headed by Andrés Manuel López Obrador (2018-2024) of the left-wing party Morena, which proposed instead the creation of a public company, CFE Telecomunicaciones Internet para Todos, which was to have 50,000 kilometers of network[13].

2) Red Compartida (public tender concluded in 2017) is a public-private association (consisting of Promtel and Altán Redes) created with the objective of increasing the coverage of telecommunications services to the unattended population in less densely populated areas by promoting affordable prices and raising the quality of services. The LFTR reserved a large part of the frequency spectrum for creating a wholesale network for providers and Mobile Virtual Network Operators (MVNO), with an estimated investment of US\$ 7.5bn. However, the goals of the project were not achieved for years. In June 2022, with Altán Redes threatened with bankruptcy, the Government of López Obrador bought most of the company's shares to continue the deployment of the network and achieve the goal of providing Internet to the target population[14].

[10] Congreso de la Unión, "Reforma constitucional en materia de telecomunicaciones y radiodifusión", Diario Oficial de la Federación, 11 June 2013, México: Secretaría de Gobernación.

[11] Judith Mariscal, "El nuevo rol del Estado en el sector de las telecomunicaciones: el caso de la Red Compartida en México, Revista Mexicana de Ciencias Políticas y Sociales, 67(244), 2022.

[12] Rodrigo Gómez (Ed.), A seis años de la Ley Federal de Telecomunicaciones y Radiodifusión. Análisis y propuestas, Tintable, 2020; Mariscal, El nuevo rol..., 2022, cit.

[13] Nicolás Lucas-Bartolo, "Gobierno de AMLO cancela el proyecto de la Red Troncal heredado por Peña Nieto". El Economista. 14 August 2019. <https://www.economista.com.mx/empresas/Gobierno-de-AMLO-cancela-el-proyecto-de-la-Red-Troncal-heredado-por-Pena-Nieto-20190815-0022.html>.

[14] Ana Luisa Gutiérrez, "AMLO anuncia que el Estado mexicano 'compra' Altán Redes", Expansión, 10 June 2022.

Some experts criticized the initial design of the Red Compartida for leaving out the participation of more private investment, which they thought was crucial for the deployment of the network.

Moreover, experts noted that only MVNOs were allowed to access the network, when there were only a few of them in Mexico which lacked the capacity to meet high demand (they accounted for 1.47% of the Mexican market). Thus, investments of large mobile operators were limited, which dented the network's competitiveness[15]. Furthermore, the network design was also criticized because it covered areas of the country that already had telecom infrastructure.

In its intention to close the digital gap, the Mexican government set the goal of providing broadband access to 70% of households and 85% of micro, small, and medium-sized enterprises (MSMEs).

These objectives were pursued through several governmental projects of the Peña Nieto administration between 2012 and 2018, yet those goals were not met at the end of its six-year term, when only 52% of households and 43% of MSMEs had broadband coverage[16].

In fact, some studies have pointed out that the growth of the telecommunications sector in Mexico has been slower than countries where there were no major constitutional reforms.

Between 2013 and 2017, Mexico's wireline grew by only 5%, broadband by some 27%, and the number of Internet users by nearly 47%[17], prompting Bravo to remark:

Legal changes are insufficient when there is a lack of comprehensive public policies focused on vulnerable social sectors that have been marginalized from connectivity benefits. [...] Without broadband infrastructure, telecommunication services and a more developed digital ecosystem that includes content and applications, there are no chances to materialize other fundamental rights such as education, health [...], information, knowledge and opportunities for social, economic, cultural and digital development[18].

[15] Mariscal, El nuevo rol..., 2022, cit.

[16] Jorge Bravo, "Las telecomunicaciones y el acceso social a internet" in Gómez (ed.), A seis años de la Ley Federal, 2020, cit., pp. 77-95.

[17] Bravo, "Las telecomunicaciones...", 2020, cit.

[18] Bravo, "Las telecomunicaciones...", 2020, cit., p. 80.

Audience Rights

After the 2013 constitutional reform, the 2014 Federal Telecommunications and Broadcasting Law introduced provisions on audience rights, such as the obligation to provide clear details that allow audiences to distinguish between opinion and information, a prohibition from presenting advertising as news (in newscasts) and a list of tasks for the ombudsman. In addition, it gave the IFT the power to issue guidelines on topics covered by the law, monitor media players, and supervise their compliance with the law[19].

However, a series of obstacles prevented the exercise of these rights in full, among them being a public lack of awareness and the reluctance of the commercial media, represented by the Chamber of the Radio and Television Industry (CIRT), to adopt these obligations, which they consider burdensome, as well as the delayed appointment of the ombudsman. The CIRT and the country's large media companies ran a campaign to discredit these rights, arguing that they "violated freedom of expression."

In October 2017, in the run-up to the 2018 electoral process, the LFTR was modified by Congress, the changes affecting the rights of the audience that had been recently gained. This counter reform was the result of pressure from media groups which presumably offered their support to the PRI, the party in government, in exchange[20].

It was left to broadcasters to self-regulate. Fortunately, a group of senators and the Mexican Association for the Audience Ombudspersons (AMDA) pushed back against the counter reform through a motion of unconstitutionality and an amparo proceeding, respectively. After the Supreme Court of Justice of the Nation ruled in AMDA's favor in 2019, the decision was challenged by Congress and the ombudsman of the CIRT[21].

Eventually, in 2020, a court established that the counter reform violated legal provisions defending human rights, and obligated Congress to restore the previous legislation that allows the IFT to issue and enforce guidelines.

The motion of unconstitutionality filed by the senators is still pending. Media owners represented by the CIRT resist changes that make them accountable for audience rights. Nonetheless, the judiciary's institutional powers also work as a counterbalance to resolve controversies.

[19] Adriana Solórzano Fuentes, "Un lustro de la defensoría de las audiencias en México" in Gómez (ed.), *A seis años de la Ley Federal*, 2020, cit., pp. 157–169.

[20] Solórzano, "Un lustro...", 2020, cit.

[21] Solórzano, "Un lustro...", 2020, cit.

Broadcast Licenses for Social Use

Following the constitutional reform of 2013, article 28 introduced four categories of licenses in broadcasting and telecommunications, namely for commercial, public, private, and social use, the latter including community and indigenous people[22]. During the constitutional reform, it was the indigenous peoples who demanded a special regime to acquire, manage, and operate their own means of communication, in line with a legal provision from the San Andrés Larráinzar Agreements, which were signed in 1996 to grant autonomy to the indigenous populations of Mexico, provisions incorporated into the Constitution[23] in 2000[24]. The inclusion of licenses for the third sector in the LFTR was a great victory for civil society in Mexico after it had been systematically blocked by the CIRT since the end of the 20th century[25].

In 2015, the IFT earmarked a segment of the frequency for social licenses. Telecomunicaciones Indígenas Comunitarias A.C (TIC A.C.), a cooperative made up of 16 communities that operate cell phone networks in Oaxaca, whose social objective was to communicate with under-served communities, obtained a license for indigenous social use.

Other communities that wanted to operate their own cell phone system could join the association. However, they soon faced obstacles. The IFT imposed tax obligations of MXN 700,000 (US\$ 44,000) on the cooperative for the use of the frequency[26].

Analysts have emphasized the contrast between this decision and others that favored commercial companies, including the case of Fundación Azteca (one of the two largest commercial television stations in Mexico), which was given a social license for lucrative sporting events, when in fact the broadcaster should have had to bid directly in a tender to obtain those rights, due to the commercial nature of its activity.

[22] Congreso de la Unión (2013), cit.

[23] Rodrigo Gómez, "The Mexican third sector of the media: The long run to democratise the Mexican communication system", *tripleC: Communication, Capitalism & Critique, Open Access Journal for a Global Sustainable Information Society*, 16(1), 2018, 332–352.

[24] Erick Huerta, "Las telecomunicaciones comunitarias: un camino hacia la autonomía de las redes" in Gómez (ed.), *A seis años de la Ley Federal*, 2020, cit, pp. 97–103.

[25] Cristina Romo, *La otra Radio. Voces débiles, voces de esperanza*, 1990, México: Fundación Manuel Buendía/IMER; Aleida Calleja, Beatriz Solís, *Con permiso. La radio comunitaria en México*, 2007, México: Fundación Friedrich Ebert-México/AMEDI.

[26] Huerta, "Las telecomunicaciones comunitarias...", 2020, cit.

After TIC A.C. filed for an amparo proceeding, the court decided in 2018 that the IFT should guarantee the broadest protection of the indigenous community rights[27]. IFT adopted a new resolution exempting TIC A.C. from paying the tax, not for being an indigenous community, but for being a tax deductible association. The latter meant that Fundación Azteca was exempted too.

TIC A.C. filed for another amparo proceeding that is still to be resolved. In early 2021, Mexico's Supreme Court granted TIC A.C. a significant injunction, exempting it from nearly MXN 1m in fees for mobile telephony frequencies. This exemption was crucial for the concessionaire's survival, allowing it to offer low-cost services to underserved communities in the southern region. In support of the injunction, Supreme Court justice Alfredo Gutiérrez Ortiz Mena emphasized the State's obligation to assist indigenous peoples through affirmative actions in the acquisition and operation of these concessions, which are regulated for social and indigenous use.

Nonetheless, with the new governmental administration, the Ministry of Finance and Public Credit (Secretaría de Hacienda y Crédito Público, SHCP) presented its spending budget for 2020, which amended the Federal Law Tax to exempt all indigenous licensees from any frequency-use fiscal obligations[28].

Public Broadcasting System

Before the constitutional reform of 2013, broadcasting was not considered a public service, nor was the notion of public media contemplated in the regulation. The new Constitution stipulates that:

Public media must have editorial independence; financial management autonomy; guarantees for citizen participation; clear rules for transparency and accountability; independence to generate content; options for financing; access to technologies and rules for the representation of diverse ideological, ethnic and cultural expressions[29].

Although 80% of public media at the federal level had appointed a citizen council by 2020, article 86 of the LFTR left it to broadcasters to design their own mechanisms of editorial independence and citizens' participation. Consequently, there has been resistance to complying with the Constitution[30]. Most citizen councils have been awarded only advisory powers rather than legally binding competences, which renders them powerless bodies.

[27] Huerta, "Las telecomunicaciones comunitarias...", 2020, cit.

[28] Huerta, "Las telecomunicaciones comunitarias...", 2020, cit.

[29] Congreso de la Unión (2013), cit.

[30] Patricia Ortega Ramírez, "Medios públicos: no sin sociedad. Avances y limitaciones en su regulación" in Gómez (ed.), A seis años de la Ley Federal, 2020, cit., pp. 115-132.

The Constitution defines the Public Broadcasting System (SPR) as a decentralized body with technical, operational and administrative autonomy. Unlike other public media, three of the nine members of its citizen council have the power to vote in the governing board. Thanks to the infrastructure deployment and multiplexing, it shares the coverage of its free-to-air TV signals with other public media[31].

The main objectives of the SPR are to provide a free broadcasting service; to reach the largest number of people possible in the country; to create content that allows dissemination of a diversity of ideas and plurality of opinions in society; to provide impartial, objective, timely, and truthful information; and to encourage independent production by allocating 30% of its broadcasting space to it every week[32].

However, specialists have pointed out the persistence of some setbacks in the performance of all public media, both at federal and state levels[33].

First, public media continue to be confused with government media, and do not enjoy real management autonomy, as the IFT has not regulated this aspect in spite of having the power to do so. Second, they lack accountability mechanisms. Third, they are limited by their dependence on the federal government or state governments who elect the directors of public media (except for the SPR, where two-thirds of the Senate are required for the appointment), which makes them vulnerable to political changes and to government pressure. Finally, they are allocated a discretionary and insufficient budget.

The Organization for Economic Cooperation and Development (OECD) pointed out in 2017 that the financing of public media in Mexico is one of the lowest compared to other member countries. From 2013 to 2018, the financing granted to them was equivalent to only a fifth of what was paid in state advertising to commercial media. Televisa, a major broadcaster, received more money during that period from the federal government than all public media at the federal level[34].

The main regulatory challenges related to public media are to guarantee their editorial independence and financial autonomy, to establish rules to guarantee citizen participation, to generate mechanisms for accountability, and to adopt structural public policies that ensure the development and economic sustainability of these media.

[31] Ortega, "Medios públicos: no sin sociedad...", 2020, cit.

[32] Congreso de la Unión (2014b). Ley del Sistema Público de Radiodifusión del Estado Mexicano. <http://www.ordenjuridico.gob.mx/Documentos/Federal/wo97328.doc>.

[33] Rodrigo Gómez, "El rol del Estado en el Sistema de Medios Mexicano 2013-2018. Punto de partida para una agenda de investigación". *Comunicación y sociedad*, 17, 2020, e7565, 1-29; Patricia Ortega Ramírez, "Participación ciudadana y medios públicos", *Revista Latinoamericana de Ciencias de la Comunicación*, 12 (23), 2015, 192-203.

<http://revista.pubalaic.org/index.php/alaic/article/view/753>; Ortega, "Medios públicos: no sin sociedad...", 2020, cit.

[34] Gómez, "El rol del Estado...", 2020, cit.

Broadcasting

During the rule of the Institutional Revolutionary Party (PRI) in Mexico, there was “a concentrated, centralized and domesticated structure of broadcasting” [35] where radio and television broadcasters and the government established relations of mutual benefit: the governments protected the business of the broadcasters, and in exchange, broadcasters promoted an uncritical view of the party in power and other institutions needed by the government, such as the Army or the Church [36].

There were some exceptions, especially in the print press and in various radio stations that were critical of the government, or which had certain independence from political influence throughout the second half of the twentieth century. The print press included *Excelsior*, *Proceso*, *El Unomásuno* in the early 1980s, *La Jornada*, the weekly *Zeta* (Tijuana) and *El Norte*, *Mural*, and *Reforma* in the 1990s. In radio, there were *Radio Red* by Gutierrez Vivo, *Radio Universidad* with *Plaza Pública* by Miguel Ángel Granados Chapa, and *MVS radio* with Javier Solorzano and Carmen Aristegui, also in the 1990s.

This media system has gradually opened up as democratic plurality and the demands of civil society have gained ground.

The media system experienced a turning point in the year 2000 with the accession of the conservative National Action Party (PAN) of Vicente Fox and Felipe Calderón. Yet, although the dynamics changed, inertia and collusion between political power and media remained. The two largest commercial television networks, *Televisa* and *TV Azteca*, used MPs and senators from different political parties to lobby for their interests. This group of legislators came to be known as the “telebancada [37].”

In 2006, they managed to push through amendments to the 1960 Law where the interests of the two television stations were favored to such an extent that said initiative remained known as the “*Televisa Law*.”

[35] Gómez, “El rol del Estado...”, 2020, *cit*.

[36] Daniel C. Hallin, “Media, political power, and democratization in Mexico” in James Curran and Myung-Jin Park (Eds.), *De-Westernizing media studies*. Routledge, pp. 97–110. <https://doi.org/10.4324/9780203981764>; Enrique Sánchez Ruiz, “Los medios de comunicación masiva en México, 1968–2000” in Ilán Bizberg and Lorenzo Meyer (Eds.), *Una historia contemporánea de México: los actores*, 2005, Editorial Océano, pp. 403–454; Gabriel Sosa Plata, “Grupos radiofónicos y concentración” in Jorge Bravo, Aimé Vega, Raul Trejo Delarbre (Eds.), *Panorama de la comunicación en México 2011: desafíos para la calidad y la diversidad*, Asociación Mexicana de Derecho a la Información, 2011, pp. 97–114; Mireya Márquez Ramírez, Juan S. Larrosa-Fuentes, *Mexico-Media Landscape*, 2019, <https://medialandscapes.org/country/mexico>.

[37] Gómez, “El rol del Estado...”, 2020, *cit*.

Following a series of developments, including an unconstitutionality motion filed by a group of senators in 2006[38], the Supreme Court resolved the illegal character of several dispositions, such as the duration of the TV licenses, their renewal, the frequency of use, and the fact that the commercial networks were allowed to offer convergent telecommunication services (voice, data and video), which was a key competitive advantage over other companies. This was an example that the media in Mexico are de facto power players that can have a strong influence on the political system[39].

The return of the once-hegemonic party, PRI, to the presidency of the republic in 2012, took place in the context of the social movement #YoSoy132 where a series of student protests were organized demanding the democratization of the media, and an end to political influence in the television stations[40], after they had been promoting the PRI candidate Enrique Peña Nieto.

This was the backdrop that helped shape the constitutional reform of 2013, which dismantled the old system of license granting that depended discretionarily on the government and allowed corrupt relations between the political system and the media. Until 2014, for example, licenses were awarded to broadcasters without a public tender. The Constitution gave the Federal Telecommunications Institute the power to make licensing-related decisions, and required the regulator to invite bids for new broadcast entrants[41]. Following such an official call in 2014, CadenaTres/Imagen Televisión of Grupo Empresarial Ángeles obtained a broadcast license, adding a third player in the commercial television segment previously dominated by Grupo Televisa and Televisión Azteca.

This reform created the legal framework for the entry of more digital radio and television players. But the growing number of tenders for broadcasting frequencies did not mean a greater variety of content[42]. Moreover, the IFT did not introduce broadcasting indicators to measure plurality and diversity in broadcasting.

[38] Gabriel Sosa Plata, Rodrigo Gómez, "Reforma a la legislación de radio, televisión y telecomunicaciones en México (2005–2007)" in Aimee Vega Montiel, Maricela Portillo, Jerónimo Repoll (Coords.), *Las claves necesarias de una comunicación para la democracia*, Asociación Mexicana de Investigadores de la Comunicación y Universidad Juárez Autónoma de Tabasco, 2008.

[39] Enrique Sánchez-Ruiz, "¿Concentración mediática o gobernabilidad democrática?: La Ley Televisa como estudio de caso" in Enrique Sánchez-Ruiz, Francisco Aceves González, Marco Antonio Cortés, Armando Ibarra (Eds.), *Gobernabilidad democrática: cultura política y medios de comunicación en México*, Universidad de Guadalajara, 2007.

[40] Rodrigo Gómez, Emiliano Treré, "The# YoSoy132 movement and the struggle for media democratization in Mexico", *Convergence*, 2014, 20(4), 496–510.

[41] Congreso de la Unión (2014). *Ley del Sistema Público de Radiodifusión del Estado Mexicano*. <http://www.ordenjuridico.gob.mx/Documentos/Federal/wo97328.doc>.

[42] Aleida Calleja, "Pluralismo y libertad de expresión después de la reforma constitucional de 2013 y la ley federal de telecomunicaciones y radiodifusión" in Gómez, A seis años de la Ley Federal, 2020, cit., pp. 105–114.

One of the most important projects made possible by the constitutional reform of 2013 was the switchover to digital television that foresaw the end of analog television broadcasting by the end of 2015. The process involved the modernization of digital facilities, as well as a program to deliver digital TV screens and decoders for analog devices to the Mexican population, to ensure people do not lose access to broadcast content[43]. The government of Peña Nieto chose to deliver 11 million digital TV screens instead of cheaper digital decoders, a decision that was heavily criticized by experts and the opposition, as it increased the cost of the switchover from US\$ 525m to US\$ 1.646bn, followed a clientelistic logic, and entailed corrupt bidding practices to obtain the screens[44].

Competition

The telecommunications market in Mexico is one of the most concentrated in the world[45]. National and international experts agree that as long as there are compact oligopolies, it is difficult to ensure effective and sustainable competition[46].

The constitutional reform of 2013 addressed the obstacles to regulate competition. In the past, the Federal Competition Commission (CFC), the Federal Telecommunications Commission (Cofetel), and the judiciary were involved in regulation of competition. The Federal Telecommunications Law of 1995 aimed to impose specific obligations on broadcasters with dominant positions, yet its implementation faced multiple obstacles, including a lack of criteria to define dominant power[47]. The IFT was also in charge of identifying dominant players in telecommunications and broadcasting, which were supposed to comply with a number of regulations related to cross-ownership, exclusive content, and sale of advertising space, among other things. Such obligations started to be more methodically implemented after 2014, as several players including América Móvil and Grupo Televisa were targeted by the new legal provisions because of their dominant market position[48].

[43] Gómez, "El rol del Estado...", 2020, cit.; Tonatiuh Lay, "¿La apertura a la competencia? La licitación pública de cadenas de televisión de cobertura nacional" in Gabriel Sosa Plata (ed.) *Análisis de la reforma en telecomunicaciones en México 2013-2016: Alcances y limitaciones*, UNAM-FCPys, 2019, pp. 109–121.

[44] Gómez, "El rol del Estado...", 2020, cit.

[45] Eli Noam, *Who owns the world media*, Oxford University Press, 2016.

[46] Elena Estavillo, "Preponderancia y competencia en una autoridad convergente" in Gómez (ed.), *A seis años de la Ley Federal*, 2020, cit., pp. 29–38.

[47] Estavillo, "Preponderancia...", 2020, cit.

[48] Raúl Trejo Delarabre, "Prensa y gobierno: Las relaciones perversas. Los medios, espacios y actores de la política en México", *Comunicación y Sociedad*, 1995, 25–26, 33–55.

América Móvil concentrated 68.9% of the wireless market, 82% of wirelines, and 71.5% of broadband. As a result of the asymmetric measures, mobile fees dropped by more than 35% for 2020, however, the company retained more than 70% of the wireline market, and the company's income concentration measured by the Herfindahl-Hirschman Index (HHI) increased by 9.4% [49]. Grupo Televisa was also declared a dominant player [50] on free-to-air TV, as it commanded 67% of the audience and 54% of the television broadcasting operators. However, following the asymmetric dispositions, Televisa only lost 5% of its free-to-air market share and maintained its dominance. Moreover, the IFT decided against labeling Televisa as a dominant player on the pay-TV market, despite having a 64% share of all subscribers at the end of 2014, which boosted its market concentration (IHH) for 2018 by 13%, further cementing its domination.

Analysts agree that the strict regulation of competition in the telecommunications sector and the lax regulation in broadcasting is a result of political interests rather than any other factors. One of the main criticisms faced by the IFT has been its decision to measure market dominance by sector, either telecommunications or broadcasting, instead of service: wireline, wireless, internet, free-to-air TV, pay-TV, etc [51]. Furthermore, asymmetric regulation does not cover all the aspects of the competition process and, therefore, it should be combined with other mechanisms of economic competition [52].

The Federal Economic Competition Commission (Cofece) is the other body created through Article 28 of the Constitution, with a mission to guarantee free competition.

[49] Estavillo, "Preponderancia...", 2020, cit.

[50] Gómez, "El rol del Estado...", 2020, cit.

[51] Raúl Trejo Delarabre, "Preponderancia: sectores, servicios, regulación", Letras Libres. 9 July 2014, <https://www.letraslibres.com/mexico-espana/preponderancia-sectores-servicios-regulacion>

[52] Estavillo, "Preponderancia...", 2020, cit.

Investment

Mobile broadband and fixed Internet access are key drivers of growth in the Mexican telecommunications sector, which have an influence on other economic sectors' growth[53].

One of the objectives of the constitutional reform of 2013 was to stimulate investment in telecommunications by removing entry barriers for national and foreign investment. To this end, four initiatives were launched[54]:

- 1) The reorganization of the spectrum to ensure more space for broadband, taking advantage of the digital frequencies available after the analog switch-off (see Broadcasting in this report);
- 2) The establishment of Red Compartida and Red Troncal (see Right of access to ICTs and coverage in this report);
- 3) The identification of players with dominant position (see Competition in this report);
- 4) Full liberalization of the Foreign Direct Investment (FDI) regime in telecommunications.

However, recent studies suggest that investments are concentrated in a total of 10 private companies, América Móvil, Grupo Televisa, AT&T, Megacable, Telefónica, Dish-MVS, Axtel, Altán, and Total Play. Moreover, investment in mobile telephony has been depressed in recent years (only 11.7% of total income has been invested) despite being the one that generates the highest income with 57% of the sector's total in 2018. This started to change in 2022, according to Telcel and Telmex, as US\$ 1.8bn was slated to be invested to include the introduction of 5G mobile technology[55].

[53] Gómez, "El rol del Estado...", 2020, *cit.*

[54] Gómez, "El rol del Estado...", 2020, *cit.*

[55] Alexander González, "Telcel lanza su red 5G en 18 ciudades de México", DPL News, 22 February 2022, <https://dplnews.com/telcel-lanza-su-red-5g-en-18-ciudades-de-mexico/>

In television, a recent significant investment is related to the merger of Grupo Televisa with Univisión, a U.S.-owned company. Whilst the former is the major shareholder, Univisión invested US\$ 3bn in cash and US\$1.5bn in combined shares which Televisa will use to pay its debt. SoftBank and ForeLight LLC invested US\$ 1bn in shares, and Google and The Raine Group were participants as well. IFT and the Federal Communication Commission (FCC), the media and telecom regulator in the U.S., approved the merger. *(For more information on foreign investment, see Technology, Public Sphere and Journalism in Media Influence Matrix Mexico).*

Protection of Journalists

One of the most serious problems in Mexico is violence against journalists in the form of murder, threats, kidnapping, espionage, and legal pressure aimed to censor or force them to reveal their sources.

This violence is similar to the levels of countries at war, in addition to a climate of impunity, where out of 5,151 cases of aggressions against journalists up to June 2020, only 210 resulted in criminal action[56]. Since the beginning of the current administration there have already been 1,945 attacks against the press, including 33 murders of journalists and two disappearances, “marking the most violent period against the press in history[57].” In most cases, the origin of the attack has been identified as coming from the Mexican State, mainly state level, followed by the local and, to a lesser extent, the federal level. However, other aggressors have been civilians, political parties, and organized crime groups.

[56] De León, “Desafíos en la protección de la libertad...”, 2020, cit.

[57] Article 19, Negación: informe anual 2021 sobre libertad de expresión e información en México, 2022, <https://articulo19.org/negacion/>.

The escalation of armed violence in the country, however, saw a turning point in 2006[58], a consequence of the “War on drugs” of Felipe Calderón’s government (2006–2012) initiated by his Secretary of Public Security, who is now facing charges in the U.S. for drug trafficking and favoring the Sinaloa cartel. The “war” saw the increased attacks among drug cartels and the State, but also the collusion of authorities at all levels with organized crime.

Journalists themselves, civil society, and international organizations have been fundamental in putting pressure on the Mexican government to promote protection mechanisms. In 2010, the Special Prosecutor for Attention to Crimes Committed against Freedom of Expression (FEADLE) was created with a task to coordinate and supervise investigations into crimes committed against journalists[59]. In 2012, the Law for the Protection of Human Rights Defenders and Journalists was published. Mexico’s states also adopted their own legal framework in the last decade, mostly replicating the federal law[60]. However, uneven democratic transition at the local level has led to delayed implementation of these laws in some regions, allowing violence to persist[61].

[58] Salvador De León Vazquez, R.A. González Macías, “Reportear en el desamparo: Análisis de las medidas de protección a periodistas en México desde el contexto local”, *Revista de Comunicación*, 2020, 19(2), 87–109. <https://doi.org/10.26441/RC19.2-2020-A5>.

[59] Fiscalía General de la República, Conoce qué es la FEADLE, 29 November 2019, <https://www.gob.mx/fgr/acciones-y-programas/fiscalia-especial-para-la-atencion-de-delitos-cometidos-contra-la-libertad-de-expresion-18894>.

[60] De León, “Desafíos en la protección de la libertad...”, 2020, cit.

[61] Rubén Arnaldo González, Víctor Hugo Reyna, “ ‘They don’t trust us; they don’t care if we’re attacked’: Trust and risk perception in Mexican journalism”, *Communication & Society*, 2019, 32(1), 147–160. <https://doi.org/10.15581/003.32.1.147-160>

State Advertising

The publication of official government information by the media, known as state (or official) advertising, is a legal and legitimate practice in Mexico. In recent years, it has become a significant source of funding for some media, especially traditional ones that have suffered losses following the entry of new digital media and the decline in revenue from commercial advertising. However, since it is not properly regulated, state advertising in Mexico implies much more than the publication of official information: it requires favorable coverage of the government bodies that pay for it, “which is a direct violation of freedom of expression.” [62]

For this reason, the law was called the “Chayote Law”, a colloquial term well-known in journalistic slang that was popularized in the 1970s to describe the gifts that governments used to corrupt journalists [63]. In fact, the continuing lack of rules for the allocation of public resources to private media outlets gives rise to many suspicions and to the unabated promotion of clientelistic practices in the political and media system in Mexico. For instance, the discretionary allocation of resources is illustrated by comparing the governments of Peña Nieto and Calderón, each of whom spent around US\$ 3bn in their six-year tenure, with Lopez Obrador only spending US\$ 339m in his first three years of government [64].

The constitutional electoral reform of 2014 highlighted the need to reform the General Law of Social Communication, but subsequent reforms have failed to put an end to discretionary and excessive allocations of state advertising, or to boost transparency in the process. At the time of writing, discussions among MPs to legislate on the matter mandated by the Supreme Court in 2021, have not yet borne fruit [65]. (See more about state funding for media in Mexico in *Funding Journalism, Media Influence Matrix Mexico*).

[62] De León, “Desafíos en la protección de la libertad...”, 2020, cit.

[63] Manuel Hernández Borbolla, “Chayote, chayó y chayoteros: ¿por qué en México se usa este peculiar fruto para referirse a los periodistas y medios corruptos?”, Actualidad RT, 9 March 2021, <https://actualidad.rt.com/actualidad/385526-chayote-chayoteros-medios-periodistas-corrupcion-mexico>

[64] Louis Paul Beauregard, “Fin de ciclo de la prensa mexicana”, El País, 3 May 2019, https://elpais.com/internacional/2019/05/03/mexico/1556840314_544026.html; Gómez, “El rol del Estado...”, 2020, cit.; Jorge Bravo, “Publicidad oficial: los favoritos del Gobierno de AMLO en 2021”, *Economicón*, 8 April 2022, <https://economicon.mx/2022/04/08/los-favoritos-del-gobierno-de-amlo-en-publicidad-oficial-2021/>

[65] Article 19, Congreso incumple con el mandato de la Suprema Corte al no expedir una ley que regule la Publicidad Oficial, 15 December 2021, <https://articulo19.org/congreso-incumple-con-el-mandato-de-la-suprema-corte-al-no-expedir-una-ley-que-regule-la-publicidad-oficial/>; Melissa Amezcua, “Anuncian Parlamento Abierto para reformar la ‘Ley Chayote’; votarán dictamen a más tardar en abril”, *Proceso*, 2 March 2022, <https://www.proceso.com.mx/nacional/2022/3/2/anuncian-parlamento-abierto-para-reformar-la-ley-chayote-votaran-dictamen-mas-tardar-en-abril-281858.html>

The Right to Freedom of Expression and Information

The Mexican Constitution, since its enactment in 1917, has pioneered the right to freedom of expression[66]. The constitutional reform of 2013 included the right to freedom of expression and information in new technologies.

Freedom of expression is also regulated in the Press Crimes Law. This law defines attacks on morality (article 2), as well as on public peace and order (article 3). It has been strongly criticized by activists and experts in the field of freedom of expression, since many of its articles go against the ideas and spirit of the Mexican Constitution, which is governed by a framework of protection and respect for human rights[67]. Although anachronistic, this law continues to be used by politicians and public servants to intimidate journalists and dissuade them from doing critical investigations. In a recent case, the academic and journalist Sergio Aguayo was sued by Humberto Moreira, former governor of Coahuila, who sought moral damages from him due to a journalistic column that Aguayo published in 2016. A judge ordered Aguayo to pay MXN 10m (US\$ 466,000) in compensation for damages. However, the academic was eventually acquitted by the Supreme Court of Justice of the Nation[68].

In a related development, in 2007, the right to reply was added to article 6 of the Mexican Constitution and, in 2015, the Regulatory Law of the Right to Reply was published, establishing that a person affected by inaccurate or offensive information has the right to request rectification.

Whilst Mexican legislation has moved forward to include those rights, the implementation and enforcement of those provisions lag behind. Moreover, mainstream media is concentrated in the hands of a dozen families, which has hindered freedom of expression in terms of guaranteeing a plurality of perspectives. Instead, such concentration has favored the political agendas related to those companies' commercial interests[69].

[66] Selene Villanueva Sossa, Jose de Jesus Chávez Cervantes, "La libertad de expresión y la defensa de los derechos humanos en México: Situación actual", *Universitas*, 2018, 28, 19–37. Doi: <https://doi.org/10.20318/universitas.2018.4309>.

[67] Miguel Carbonell Sánchez, *Los derechos fundamentales en México*, 2019, Editorial Porrúa.

[68] David Marcial Perez, "La Suprema Corte absuelve a Sergio Aguayo de los cargos de daño moral contra Humberto Moreira", *El País*, 17 March 2022, <https://elpais.com/mexico/2022-03-17/la-suprema-corte-absuelve-a-sergio-aguayo-de-los-cargos-de-dano-moral-contra-humberto-moreira.html>

[69] Darío Ramírez, "La libertad de expresión en México amenazada por las agresiones a periodistas y la concentración de medios", *El Cotidiano*, 2018, 150, pp. 47–52; Dávila, R. y Román, M., "Concentración mediática en México y las alternativas de comunicación. Una perspectiva crítica", Ponencia del XII Congreso internacional ULEPICC México 2021.

Regulatory Authorities

Broadcast and Frequency Spectrum Regulation

Federal Institute of Telecommunications (IFT)

Remit and Tasks

The Federal Institute of Telecommunications (IFT) was created during the constitutional reform of 2013 as an autonomous body, independent from the federal government, with legal personality and having its own assets. Its goal is to regulate broadcasting and telecommunications. In accordance with article 28 of the Constitution, the IFT is in charge of:

“[...] the regulation, promotion and supervision of the use, running and operating of the broadcasting spectrum, the networks and the provision of radio broadcasting and telecommunications services, as well as access to active and passive infrastructure and other essential inputs”^[70].

The IFT was granted authority in matters of economic competition in the broadcasting and telecommunications sectors, including the award and revocation of licenses in telecommunications and broadcasting, and the regulation of cross-ownership cases to eliminate barriers to competition.

Board Composition

The governing body of the IFT is a commission consisting of seven members appointed by the Executive.

They have to be approved by the Senate, after passing an examination of their knowledge and fulfilling a set of personal and professional requirements. The IFT commission chair is elected by two-thirds of the Senate. The establishment of the IFT was an extremely important decision, as it has created a regulatory framework for the media and telecommunications system.

The institutional design of the IFT is robust enough to achieve its objectives, which are to regulate the media and telecom markets, respecting the principles of competition and ensuring diversity and pluralism.

[70] Congreso de la Unión, “Reforma constitucional en materia de telecomunicaciones y radiodifusión”, Diario Oficial de la Federación, 11 June 2013, México: Secretaría de Gobernación.

However, the 2014 law (LFTR) took away some of the IFT's organizational and operational autonomy. Although the IFT had the opportunity to defend its independence by filing a constitutional appeal, as proposed by two of its commissioners, the other commissioners decided not to do so, preferring to address legal deficiencies on a case-by-case basis[71]. Instead, the LFTR gave more powers to the Executive, making the regulator easier to be captured by political interests[72]. For example, the president of the IFT, elected by majority in the Senate, has many powers including full control of the agenda discussed by the commission, internal processes, information, and human resources, which thus reduces the power of the commission to run the institution.

Another threat to the IFT's independence is the interference of other regulatory authorities. For example, there is a very fine line between the powers of the IFT and those of the Federal Economic Competition Commission (Cofece), which often leads to jurisdictional conflicts between them[73]. Furthermore, the influence of economic, political, and media interest groups on the IFT is still a pressing concern[74].

Taking into account the institutional challenges faced by the IFT and its experience in its ten-year history, experts say that, to improve the body's independence, a more horizontal governance structure must be introduced, along with performance evaluation mechanisms, solid HR strategies, an accessible system to obtain internal and external information, standardized processes to end the organization's excessive bureaucratic burden, and measures to boost the transparency of its decision-making processes.

[71] Adriana Labardini Inzunza, "Hacia la excelencia regulatoria del Instituto Federal de Telecomunicaciones desde su autonomía" in Gómez, (ed.), *A seis años de la Ley Federal*, 2020, cit. pp. 13–28.

[72] Labardini, "Hacia la excelencia regulatoria..." 2020, cit.

[73] Labardini, "Hacia la excelencia regulatoria..." 2020, cit.

[74] Instituto Federal de Telecomunicaciones (IFT), *Planeación estratégica*, 2018, <http://www.ift.org.mx/sites/default/files/planeacionestrategica.pdf>

Financing

Since the beginning of the López Obrador administration (2018–2024), the IFT has been criticized for being inefficient and expensive. In fact, the Mexican president has pointed out several times that the country’s autonomous constitutional bodies are costly institutions that hinder the actions of the executive power. He added that these bodies were established following “neoliberal” logic “to facilitate privatization.”[75] Hence, they have no social function, the president added, referring to the little progress made by the IFT in fighting dominant players, which has resulted in low Internet coverage across the country.

López Obrador said that his administration did not have time to reform these organizations, and a constitutional reform that would change them required a qualified majority, which the governing coalition did not have[76].

Therefore, the IFT has been operating with only four commissioners since February 2022, after the Mexican president made two appointments in 2021 that were rejected in the Senate. He has not made any new appointments since then, arguing that the list of proposed candidates did not follow procedure[77]. As a result, the IFT’s activities have been frozen, as the institution needs at least five commissioners to make certain decisions[78].

[75] Andrés Manuel López Obrador, Conferencia presidente. Gobierno de México, 15 February 2022, <https://www.youtube.com/watch?v=08PsXvZ7t2g>.

[76] Andrés Manuel López Obrador, Conferencia presidente, cit.

[77] Karla Rodríguez, “AMLO rechaza validez de candidatos del IFT y Cofece”, El Financiero, 1 April 2022, <https://www.elfinanciero.com.mx/empresas/2022/04/01/amlo-rechaza-validez-de-candidatos-de-ift-y-cofECE/>.

[78] Irene Levy, “¡A la congeladora dos organismos autónomos!”, El Universal, 4 April 2022, <https://www.eluniversal.com.mx/opinion/irene-levy/la-congeladora-dos-organismos-autonomos>.

Print Media Regulation

In Mexico, the written press is regulated by the Press Offense Act, which was previously called the Press Act. This legislation was enacted by President Venustiano Carranza in 1917, and has since been modified multiple times. Originally, it was adopted as a temporary regulation added to articles 6 and 7 of the Mexican Constitution. However, more than a century later, the law is still in force.

The Press Offense Act has 36 articles, three of which have been abolished over time. Two key issues are regulated through this law: the limits imposed on freedom of expression through various provisions, such as respect for the rights of third parties, public order and morality (see *The Right to Freedom of Expression and Information in this report*); and the regulation of print media. Article 13 requires anyone who establishes a publishing enterprise to inform the local authority. Article 15 states that, to be disseminated, printed material must have the identification data of the publisher, as well as the printing house and the place where it was published. Article 26 explains that no one can act as director or editor of a publication if they are based abroad, or if they are in “prison or on parole, or under bail.”

This law is clearly unfit for today’s realities, representing an anachronistic legal system. The regulation is over a hundred years old, a period in which the Mexican Revolution took place and a semi-authoritarian regime ruled for more than seven decades, and since then, the transition to a multi-party system that lasted almost 20 years has unfolded. After such a long time, the relationship between the press and public authorities has changed substantially. Moreover, technological conditions have changed dramatically with the rise of electronic media, followed by the fast spread of digital media which prompted print media to switch in droves to digital platforms. Finally, from a legal point of view, the provisions put forward by this law are incompatible with the standards for freedom of expression that have been developed through the international legal system in the past decades.



Hence, the Press Offense Act has been of little use in recent decades. No specific regulatory authority for print media exists in Mexico. Instead, the print media industry has been regulated in a discretionary way through negotiations between various public authorities and the print media, which has led to a collusion that, for a long time, has affected the independence of a large part of the print media system. As a result, many newspapers tend to be pro-government and carry out journalistic coverage favorable to the regime in exchange for tax forgiveness, discounts on the purchase of basic supplies, and state advertising contracts[79]. Although such practices have decreased in intensity and frequency, they still appear, especially at state and municipal levels.

Internet Regulation

In Mexico, there is no specialized regulator of the Internet. Yet, various regulators take charge on Internet-related issues, depending on the case. They include Cofece, the IFT, and to a lesser extent, the National Institute for Transparency, Access to Information and Protection of Personal Data (INAI). (*See respective sections for a discussion of those regulators*).

When it comes to content moderation in social media, the regulatory gap is clear, and both the IFT and the INAI are expected to start working together on such issues. In this regard, some proposals have been made, but as of November 2024 there is no official specialized Internet regulator[80]. In terms of international commerce, this is governed by the United States–Mexico–Canada free trade agreement (USMCA) incorporated in Chapter 19 on digital commerce, data protection for e-commerce, cybersecurity, and free flow of data provisions among the three countries[81].

[79] Sallie Hughes, *Redacciones en conflicto: El periodismo y la democratización en México*, Miguel Ángel Porrúa and Universidad de Guadalajara, 2009; Chappell Lawson, *Building the Fourth Estate: Democratization and the Rise of a Free Press in Mexico*, University of California, 2002; William A. Orme, Jr. (Ed.), *A Culture of Collusion: An Inside Look at the Mexican Press*. University of Miami and North South Center Press, 1997.

[80] Joao Brant, Clara-Luz Álvarez, and Rodrigo Gómez, “Moderación de contenidos en Internet y protección de la libertad de expresión en redes sociales”, *Relatoría Unesco/Observacom/Friedrich Ebert Stiftung*, 2021.

[81] T-MEC (2020), “Textos finales del Tratado entre México, Estados Unidos y Canadá”, <https://www.gob.mx/t-mec/acciones-y-programas/textos-finales-del-tratado-entre-mexico-estados-unidos-y-canada-t-mec-202730?state=published>

Data Regulation

National Institute of Transparency, Access to Information and Data Protection (INAI)

The Federal Law on Transparency and Access to Public Government Information was adopted in 2002 and the Federal Institute for Access to Information (IFAI) was created through a presidential decree. Both came after the democratic change of power, when the hegemonic party lost the presidency of the Republic after 70 years. It was the result of work by a group of journalists and academics known as Grupo Oaxaca[82]. IFAI's mission was to ensure the exercise of the right of access to information and to protect personal data held by the Federal Public Administration, as well as to force the authorities to make their actions transparent. Each state of the Mexican Republic had the obligation to adopt its own laws and establish mechanisms to ensure implementation of the legal provisions. The regulators in charge of monitoring legal compliance have changed over time[83].

In 2015, a new General Law on Transparency and Access to Public Information was promulgated, and IFAI changed its name to the National Institute for Transparency, Access to Information and Protection of Personal Data (INAI), becoming an autonomous body with new powers, its remit extending to trade unions, political parties, legislators, autonomous bodies, and any individual or legal entity that receives or uses public resources, as well as states and municipalities.

INAI's tasks include guaranteeing the right of access to public information and protection of personal data, promotion of transparency and openness of public institutions, and protection of human rights and gender equality at the institutional level.

Thanks to these legal provisions, journalistic investigations of great importance have had the conditions to be conducted. Some of them uncovered serious corruption cases, such as La Casa Blanca, which dug into the corrupt affairs of the former Mexican president Peña Nieto; La Estafa Maestra, which investigated the disappearance of public funds; or the fictitious companies of the former governor of Veracruz Javier Duarte. Some of these investigations have led to the arrest of high-level politicians[84].

[82] Alfredo Maza, "Del Ifai al Inai: La lucha por el derecho a saber", El Sol de México, 22 January 2021, <https://www.elsoldemexico.com.mx/mexico/del-ifai-al-inai-la-lucha-por-el-derecho-a-saber-6274532.html>

[83] De León, "Desafíos en la protección de la libertad...", 2020, cit.

[84] Maza, "Del Ifai al Inai...", 2021, cit.

Other Regulators With Influence in the Media

Federal Economic Competition Commission (Cofece)

Created through the alteration of article 28 of the Constitution, the Federal Economic Competition Commission (Cofece) is another regulatory body that plays a role in telecommunications and broadcasting, albeit strictly limited to ensuring free competition.

Like the IFT, Cofece is an autonomous constitutional body with legal personality and its own assets. Due to the specialized powers of the IFT in telecommunications and broadcasting, Cofece does not have primary competences in those sectors. However, with the rise of digital platforms of different kinds, including Uber, Netflix, and Amazon, doubts emerged about who is the competent authority to assess possible cases of concentration.

Hence, the Federal Law of Economic Competition established tribunals specialized in economic competition, broadcasting, and telecommunications, whose main task is to determine which body has jurisdiction over a certain matter when two authorities claim to be competent.

Decision-Making

The main public actors involved in decision-making on public policies for the communication sector come from different state agencies. The executive power runs the Secretariat of Infrastructure, Communications and Transportation, with a decision-making role in the field. In the legislative branch, decisions are made by MPs and senators. The judicial power consists of specialized courts and the Supreme Court of Justice of the Nation.

This division of powers has had a positive impact in media regulation. It has allowed a balance in opinion and the possibility to counter any attempt at unilateral decision-making.

Such are the following cases:

- The ruling of the Supreme Court of Justice of the Nation on audience rights in favor of the Mexican Association for the Audience Ombudspersons (AMDA) against the modification of the LFTR, the 2017 legislative counter reform that reversed audience rights as a result of pressure from corporate media.
- The initiative of the Ministry of Finance and Public Credit for the 2020 fiscal budget and its approval in Congress, which modified the Federal Rights Law to exempt indigenous broadcasters from paying taxes for the use of the frequency spectrum.

On the other hand, there are still important private actors that exert undue interference in public decision-making, for example in the decisions of regulators such as the IFT. Improved regulation of lobbying, conflict of interest, revolving door practices and collusion is still needed[85], along with increased transparency of decision-making processes.

[85] Rocio Magdalena Aguilar Rodriguez, *Cabildeo/lobbying en México. El cabildeo legislativo como práctica de grupos de presión: El caso del Consejo Coordinador Empresarial en México (2008-2012)*, Tesis doctoral en Estudios Sociales, UAM-Iztapalapa, 2018.

Influential Actors

Local Influencers

Industry associations

National Chamber of the Radio and Television Industry

The National Chamber of the Radio and Television Industry (CIRT) is a business association that brings together the country’s large corporate radio and television media. Its activities include running analysis and assessment of key issues affecting the industry; representing the interests of its partners in lobbying the public administration; and providing technical, legal, fiscal, and administrative advice to its members[86].

The CIRT played an important role in the legislative and judicial battles that accompanied the constitutional reform. In one instance, CIRT pushed back against the obligation to distinguish information from opinion in the media. In February 2022, when the latest controversy on the matter was being discussed, the CIRT called on the Supreme Court of Justice of the Nation to consider Minister González Alcántara’s proposal to distinguish between information and opinion as a form of censorship. In late August 2022, Mexico’s Supreme Court ruled that reforms to the Federal Telecommunications and Broadcasting Law, supported by CIRT, were invalid due to procedural violations. Civil society organizations AMDA and AMEDI, involved in the dispute, welcomed the ruling as a victory for audiences, emphasizing that the decision strengthens human rights, freedom of expression, and the right to information. If approved, considered the leader of the CIRT, such a provision would have been a setback, as it would not allow the population to be duly informed[87].

MX Internet Association

The MX Internet Association represents affiliated companies that operate in the Internet industry. One of the association’s purposes is to represent the interests of its members and provide expertise in the Internet field, based on principles of a free and open Internet, the development of infrastructure and the reduction of the digital divide, freedom of expression and the right to information, privacy and data protection, the free flow of cross-border data, cybersecurity, open data, technological neutrality and competition, net neutrality, and the digital economy[88].

[86] Cámara Nacional de la Industria de Radio y Televisión (CIRT), Radio y televisión mexicanas, 2021, <https://cirt.mx/>.

[87] Redacción AN, “Exhorta la CIRT a la Suprema Corte a revisar iniciativa sobre opinión en radio y televisión”. Aristegui Noticias. 22 February 2022, <https://aristeguinoticias.com/2202/mexico/exhorta-la-cirt-a-la-suprema-corte-a-revisar-iniciativa-sobre-opinion-en-radio-y-television/>.

[88] Asociación de Internet MX, ¿Quiénes somos?, 2022, <https://www.asociaciondeinternet.mx/quienes-somos>.

Many of these principles coincide with the interests of U.S. industrial associations such as the Information Technology and Innovation Foundation, which groups communication technology and Internet associations. Such principles were incorporated into the United States-Mexico-Canada Treaty [89]. The Association participated in discussions focused on the regulation of Internet platforms, specifically opposing payment of taxes.

Civil Society/Non-Governmental Organizations

AMDA

The Mexican Association of Audience Ombudsmen (AMDA) aims to ensure that audience rights are respected and the role of the ombudsmen is fulfilled. It is made up of individuals who are in charge of tasks aimed at ensuring audience defense. They belong to programming councils or other groups that act as intermediaries between the media and its audiences. AMDA's activities include communication with the audience ombudsmen, holding events to promote audience rights, conducting studies, and providing training, evaluation, technical advice, and consulting services on the matter [90].

Thanks to pressure from AMDA, the Supreme Court of Justice of the Nation found the reform to article 256 of the LFTR unconstitutional, which eliminated provisions to defend audience rights [91].

AMEDI

The Mexican Association for the Right to Information (AMEDI) works on promoting and defending the rights of citizens to information and communication, as well as the fight for the democratization of the media, and the guarantee of the right to inform and the right to reply. Historically, it has consisted of NGOs and academics, and has operated in different states [92]. Its activities include establishing networks with related associations, authorities and the media, and offering public opinions about communication-related topics. Recently, AMEDI has been vocal in calling for the independence of the IFT and INAI.

[89] USITC, U.S.-Mexico-Canada Trade Agreement: Likely Impact on the U.S. Economy and on Specific Industry Sectors, United States International Trade Commission, 2019, <https://www.usitc.gov/publications/332/pub4889.pdf>.

[90] AMDA, ¿Quiénes somos?, 2020, <https://amda.unam.mx/quienes-somos/>.

[91] Solórzano, "Un lustro...", 2020, cit.

[92] Graciela Bernal Loaiza and Lay Arellano Israel Tonatiuh, Diez años de lucha por el derecho a la información en Jalisco: 2008-2018, AMEDI Jalisco, 2019.

Article 19 Mexico and Central America

Article 19 in Mexico and Central America is a non-governmental organization that promotes and defends the rights of freedom of expression and access to information under international human rights standards, with the aim to contribute to democracy. Its activities include defending the right to disseminate information and opinions in the media, investigation of threats and trends, documentation of violations of the rights of freedom of expression, assisting people whose rights have been violated, and contributing to debates on public policies in the media.

The organization produces reports that are essential reading on topics such as state advertising spending (see more in Public Advertising in this report) and violence and threats against journalists (see Protection of Journalists in this report). The organization has also been very active in criticizing corruption in the decision-making processes around state advertising spending[93].

Observatel

Observatel A.C. is a telecommunications observatory in Mexico that investigates, monitors and issues opinions and articles on the media and telecommunications[94]. Recently, it has attracted attention through its call to the Government to issue the Universal Digital Inclusion Policy, a public policy required by the Constitution, and a law to guarantee the population’s access to ICTs[95].

R3D

The Network for the Defense of Digital Rights (R3D) is a Mexican organization dedicated to the defense of human rights in the digital environment. The organization’s main activities include policy research, strategic litigation, and campaigns to promote digital rights in Mexico such as freedom of expression, privacy, and access to knowledge and culture[96].

[93] Article 19, Negación: informe anual 2021, 2022, https://articulo19.org/wp-content/uploads/2022/04/Book-1_A19_2021_V03_BAJA-3.pdf.

[94] Observatel, Observatel, el observatorio de telecomunicaciones en México, 2016, <http://www.observatel.org/>.

[95] Ana Luisa Gutiérrez, “Observatel promueve un amparo para que el gobierno emita su política digital”, *Expansión*, 9 December 2021, <https://expansion.mx/empresas/2021/12/09/observatel-promueve-un-amparo-para-que-el-gobierno-emita-su-politica-digital>.

[96] Red en Defensa de los Derechos Digitales (R3D), ¿Qué hacemos?, 2022, <https://r3d.mx/que-hacemos/>.

External Influencers

IACHR

The Inter-American Commission on Human Rights (IACHR) is an autonomous body of the Organization of American States (OAS), whose purpose is to promote and protect human rights on the American continent. Together with the Inter-American Court of Human Rights, it is part of the Inter-American System for the protection of human rights. Among its activities, the IACHR has an individual petition system, monitoring of the human rights situation in member states, and it attends to priority thematic lines[97]. IACHR plays a key role in influencing media policies in Mexico.

UNESCO

The United Nations Educational, Scientific and Cultural Organization (UNESCO) has, among other priorities, the defense of freedom of expression, a fundamental right and an essential condition for democracy and development. UNESCO promotes the adoption of international standards by member countries and manages programs that promote the free circulation of ideas and the exchange of knowledge[98]. UNESCO is seen as a major player in influencing the debates around media regulation and policy in Mexico.

Rapporteurs for Freedom of Expression

The Special Rapporteur for Freedom of Expression of the Inter-American Commission on Human Rights (IACHR) and the Special Rapporteur on the Promotion and Protection of the Right to Freedom of Opinion and Expression of the United Nations Commission on Human Rights have the purpose of stimulating the defense of the right to freedom of thought and expression, due to their fundamental roles in the consolidation and development of the democratic system. Both rapporteurs made an official visit to Mexico from 27 November 2017 to 4 December 2017, at the Government’s invitation. It was a joint follow-up visit after one they had carried out in 2010. Published in 2017, the report constitutes an international claim against the Mexican State for the violation of the right to freedom of expression, calling for immediate solutions to be sought to guarantee it[99].

[97] OEA, ¿Qué es la CIDH?, 2022, <https://www.oas.org/es/CIDH/jsForm/?File=/es/cidh/mandato/que.asp>.

[98] UNESCO, Sobre la Unesco, 2021, <https://es.unesco.org/about-us/introducing-unesco>.

[99] Villanueva and Chávez, “La libertad de expresión...”, 2018, cit.

Observacom

The Latin American Observatory of Regulation, Media and Convergence (Observacom) is an independent professional organization specialized in regulation and public policies for the media, telecommunications, the Internet, and freedom of expression, with an emphasis on rights, access, diversity, and pluralism. It comprises expert researchers from Latin America and the Caribbean who generate information and analysis, as well as policy recommendations. The organization engages with actors from different fields, including academics, businesses, and state bodies, who are involved in communication issues[100]. One of Observacom’s recent projects in Mexico was an event held jointly with UNESCO to discuss online content moderation and protection of freedom of expression on social media, which brought together government representatives, academics, civil society organizations, regulation experts, and user associations[101].

AMARC

The World Association of Community Radio Broadcasters (AMARC) is an association with a mission to promote, cooperate, coordinate, and exchange advisory services for community radio stations, and protect their right to freedom of expression. In Mexico, it has the legal status of Red de Radios Comunitarias de México A.C., made up of 62 community and indigenous radio stations[102].

Article 19

At the international level, Article 19 aims to defend freedom of expression and access to information. For this reason, it carries out monitoring and research tasks, and takes stances and makes recommendations in the countries in which it works and where it has regional offices. Its main thematic focus is on censorship, digital rights, religious freedom, freedom of the press, and the safety of journalists and of human rights defenders[103]. The work of the regional office in Mexico has focused its attention on threats against journalists and high levels of impunity, as well as on other attacks on human rights, including the refusal by authorities to disclose documents on human rights violations and reveal public information, the manipulation of media outlets’ editorial agenda through the discretionary allocation of state advertising, and the Pegasus case of espionage against journalists, lawyers, and human rights defenders[104].

[100] Observacom, *Quiénes somos*, 2022, <https://www.observacom.org/quienes-somos/>. Full disclosure: this report is produced as part of a project run by Observacom. The organization, however, has not participated in any way in the research conducted for this study or in its drafting.

[101] Brant, Álvarez, and Gómez, “Moderación de contenidos en Internet...” 2021, cit..

[102] AMARC, *¿Quiénes somos?*, 2019, <https://www.amarcMexico.org/amarcMexico.html>.

[103] Article 19, *What we do*, 2022, <https://www.article19.org/what-we-do/>.

[104] Article 19, *Mexico. In focus*, 2022, <https://www.article19.org/regional-office/mexico-and-central-america/>.

Conclusion

Despite the positive impact of the constitutional reform of 2013 and other related regulations, media policy in Mexico is still faced with numerous challenges. Many objectives of the 2013 reform, in fact, could not be achieved because of a series of secondary laws that have been adopted in the meantime. Controversial cases remain unresolved.

The Mexican media system thus remains one of the most concentrated in the world. Therefore, more comprehensive economic competition measures and policies are needed, for instance, asymmetric policies by service and not by sector. On the other hand, as the goals of the governments in the media have not been achieved, the digital divide remains wide, which means that vast swathes of the Mexican population do not fully enjoy the benefits of digitization. Part of the reason is that post-reform investments were below expectations and at much lower levels than in other countries, except for a recent investment in a 5G network.

Public media remain financially vulnerable, as authorities have discretionary power in approving their budget and exert significant influence in their editorial coverage. Moreover, public media remain reluctant to be held accountable.

Despite advances in bolstering the autonomy of regulators, economic, political, and industry influences persist. To prevent them, a lobbying law that establishes what is legal and what is not is needed. The current administration also needs to improve the functioning of the IFT by identifying and removing practices that make its work ineffective. Generally, regulatory authorities need to be more self-critical and further focus on their professionalization by establishing methods of evaluation of their work, to be able to adjust their strategies and better coordinate in achieving their objectives.

The media sector is also affected by clientelistic practices, which are rife in Mexican media, one reason being the delay in amending the General Law of Social Communication to include provisions regulating state advertising. Moreover, legal advances in creating mechanisms for protection of freedom of expression have not resulted in a decrease in violence against journalists.

Finally, the legal framework ensuring audience rights, derived from a verdict of the Supreme Court of Justice of the Nation, has still not been implemented.

To address these challenges, above all, a multisectoral public policy on communication and digital matters is necessary. As Bravo wrote, “legal changes are insufficient when comprehensive public policies are lacking” [105].

[105] Bravo, “Las telecomunicaciones...”, 2020, cit.

Chapter 2

Funding Journalism

Media Market Overview

The Mexican media system is categorized as a political-clientelistic system, with limited pluralism and liberal aspirations and a high degree of concentration in the television and telecommunications sectors[106]. At present, its main characteristics include: notably low levels of newspaper circulation; regional and local atomization; the preeminence of opinion journalism over investigative journalism; the dominance of commercial multimedia media groups; and a close relationship with political entities at municipal, state and federal levels. This is down to the eternal temptation on the part of governments and political figureheads to use public service media for their own purposes.

The Mexican media system is not homogeneous and has significant differences at the regional-state and state-local levels[107]. These can be seen, for example, in the coverage of telecommunications and broadcasting, the pluralism of media sources, and the local dynamics of political and journalistic practices[108]. In addition, organized crime (mainly narco-trafficking) is affecting local media in various ways and, in particular, the work done by journalists[109]. In this sense, Mexico has been considered one of the most dangerous countries in which to practice journalism, with an alarming increase in the number of journalists murdered during the first two decades of the 21st century[110].

[106] Rodrigo Gomez. (2020). El rol del Estado en el Sistema de Medios Mexicano 2013-2018. Punto de partida para una agenda de investigación. *Comunicación y sociedad*, 17.

[107] In this regard, we have highlighted in another study the need to think about the media subsystems in Mexico, in order to understand the differences and complexities of the system as a whole. There is research that has suggested and begun to develop this idea. See Rubén Arnoldo González Macías, Luis García, Alejandra Toxtle, Sallie Hughes, Celia Del Palacio, & Josefina Buxadé. (2023). Panorama de los medios informativos en México: Una mirada a los subsistemas regionales. *Global Media Journal México*, 20(39), 89-109. <https://doi.org/10.29105/gmjmx20.39-508>; Salvador De León-Vázquez, & Alejandro García-Macías. (2022). Cinco tendencias subnacionales del desarrollo mediático en México. *Frontera Norte*, 34. <https://doi.org/10.33679/rfn.vii.2264>; Grisel Salazar. (2019). Strategic allies and the survival of critical media under repressive conditions: An empirical analysis of local Mexican press. *The International Journal of Press/Politics*, 24(3), 341-362.

[108] Juan Larrosa-Fuentes. (2015). Crítica al sistema legal de radiodifusión y telecomunicaciones desde una perspectiva local. *Medios de comunicación y derecho a la información en Jalisco*, 2014, ed. María Magdalena Sofía Paláu Cardona, Guadalajara, ITESO, pp 109-115.

[109] Rubén Arnoldo Gonzalez. (2021). Mexican journalism under siege. The impact of anti-press violence on reporters, newsrooms, and society. *Journalism Practice*, 15(3), 308-328.

[110] From January 2000 to September 2023, Article 19 has documented the murder of 161 journalists, possibly in connection with their work as journalists. See Article 19. (2024). Periodistas asesinados en México; en posible relación con su labor periodista. <https://articulo19.org/periodistasasesinados/#:~:text=De%202000%20a%20la%20fecha,anterior%20de%20Enrique%20Pe%C3%Bl%20Nieto>

Another characteristic of the Mexican media system is the dominance of television, as it has historically been a primary source of information and cultural consumption for Mexican audiences. In recent years this dominance has been waning due to the rise of digital media. According to the National Survey of Audiovisual Content Consumption (*Encuesta Nacional de Consumo de Contenidos Audiovisuales, ENCA*) 2022 of the Federal Telecommunications Institute (*Instituto Federal de las Telecomunicaciones, IFT*), 77% of those who own a TV set watch free-to-air channels and, on average, 2.5 hours of free-to-air television are watched per day; news and movies are watched most frequently. After television, radio is one of the most consumed media sources, according to the same IFT survey, which found that one out of every three Mexicans listens to radio for at least three hours a day. In addition, this study reports that the most popular types of programs are music (84%) and news (81%)[111].

As a result of these shifts in the media system, the distribution of advertising spending has changed significantly in the last ten years, after decades of dominance by television, which used to attract more than 50% of total ad expenditure nationwide [112]. According to the latest reports, television has already been displaced by the internet and now accounts for only a quarter of the advertising market (26%). In addition, in 2016 a third television network was launched, Imagen Television[113], breaking the television duopoly that had dominated the Mexican media system from 1993 to 2015. As a result, Televisa and TV Azteca have since had to share the advertising pie with a third nationwide player.

[111] Instituto Federal de Telecomunicaciones. (2022). Encuesta Nacional de Contenidos Audiovisuales México: IFT. https://somosaudiencias.ift.org.mx/archivos/01reportefinalencca2022_vpa.pdf

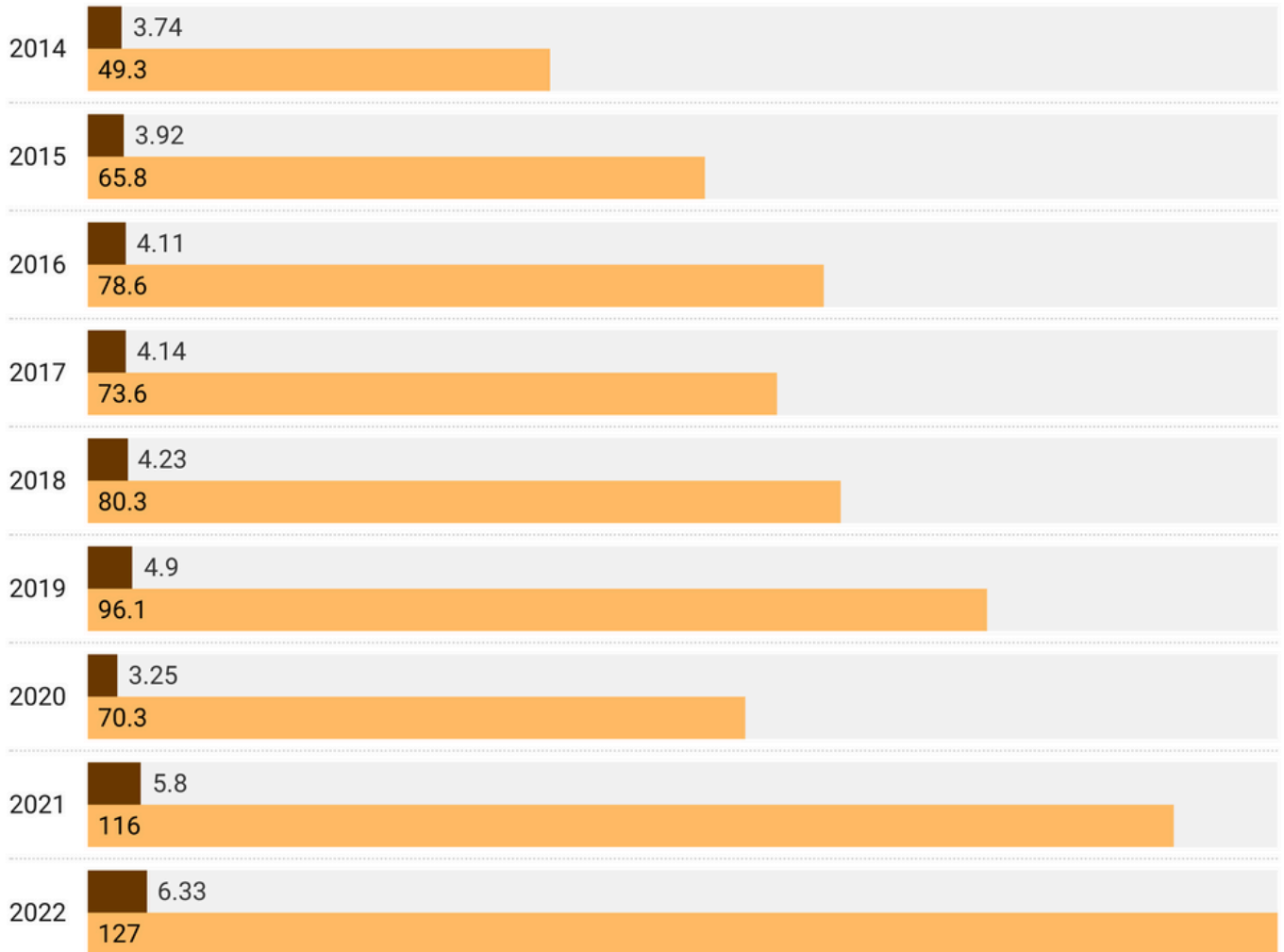
[112] Rodrigo Gómez & Chiara Sáez. (2022). Media Policies in Chile and Mexico. A Comparative Analysis in the Context of the Pacific Alliance (2012–2018). *International Communication Gazette*, 84(6), 467–485.

[113] This network emerged as part of the constitutional reform of 2013, which mandated the licensing of two new television networks nationwide. Only Grupo Imagen was licensed as the other bidder, Grupo Radio Centro did not comply with the payments required for licensing.

Advertising revenues in Mexico, 2014-2022

In billion

■ Dollars ■ Pesos



Source: Authors' own estimates based on data from Merca 2.0 and PCW • Created with Datawrapper

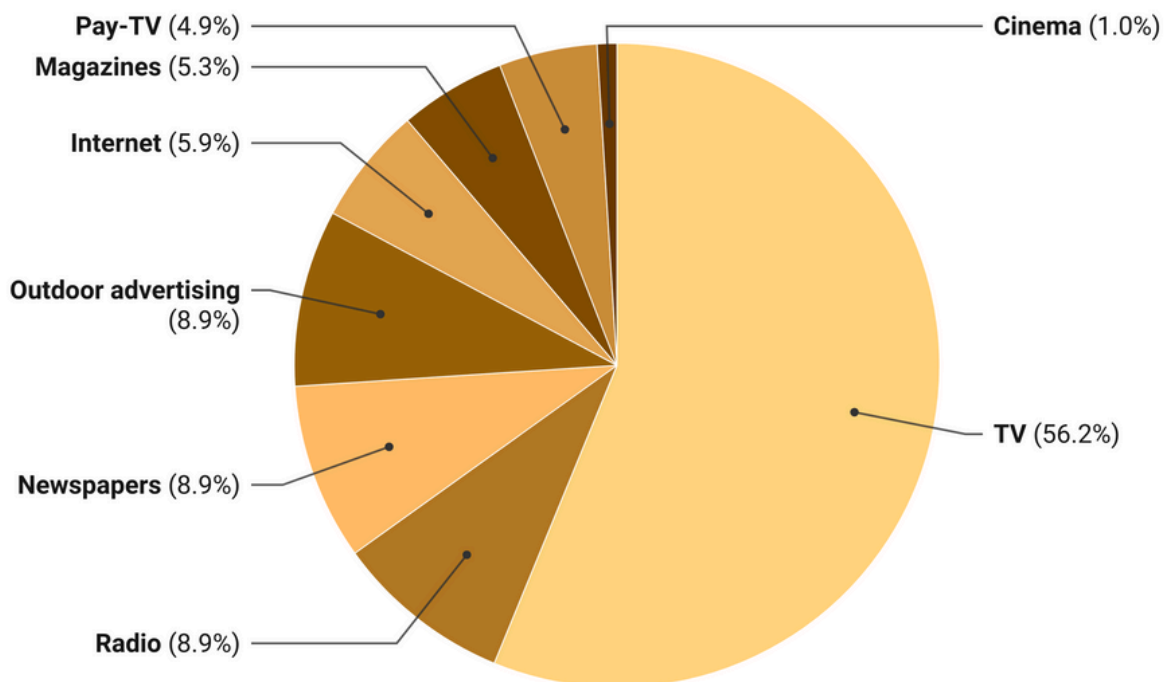
Online advertising is highly concentrated in the hands of two U.S.-based companies, Alphabet and Meta, which account for 82.4% of the market[114]. These two companies had an estimated advertising income of MXN 60.7bn (US\$ 3bn) in 2022, representing between them almost half of the entire advertising investment across all Mexican media.

[114] Dora Villanueva. Google y Meta acaparan el 82.4% de la publicidad digital en México. 15 November 2023. La Jornada. <https://www.jornada.com.mx/noticia/2023/11/15/economia/google-y-meta-acaparan-el-82-4-de-la-publicidad-digital-en-mexico-487>.

In view of this situation, which has an adverse impact on competition in the advertising market, the Federal Economic Competition Commission (*Comisión Federal de Competencia Económica, COFECE*), Mexico’s antitrust regulator, initiated an investigation from 2020–2023. It sued the U.S. company Google for anti-competitive practices in the digital advertising market, to the detriment of competitors and consumers. The procedure may conclude with the acquittal of the technological giant, the obligation to change its commercial practices, or with a fine of up to 8% of its total revenues of the previous year if any unlawful conduct is found. COFECE was to make a decision within a period not to exceed 120 business days starting on November 8, 2023[115]. A decision was yet to be made at the time of writing.

Questions remain as to how COFECE decided on that particular revenue percentage, and why the regulator only targeted Google with its suit.

Advertising spending by media segment in Mexico, 2010

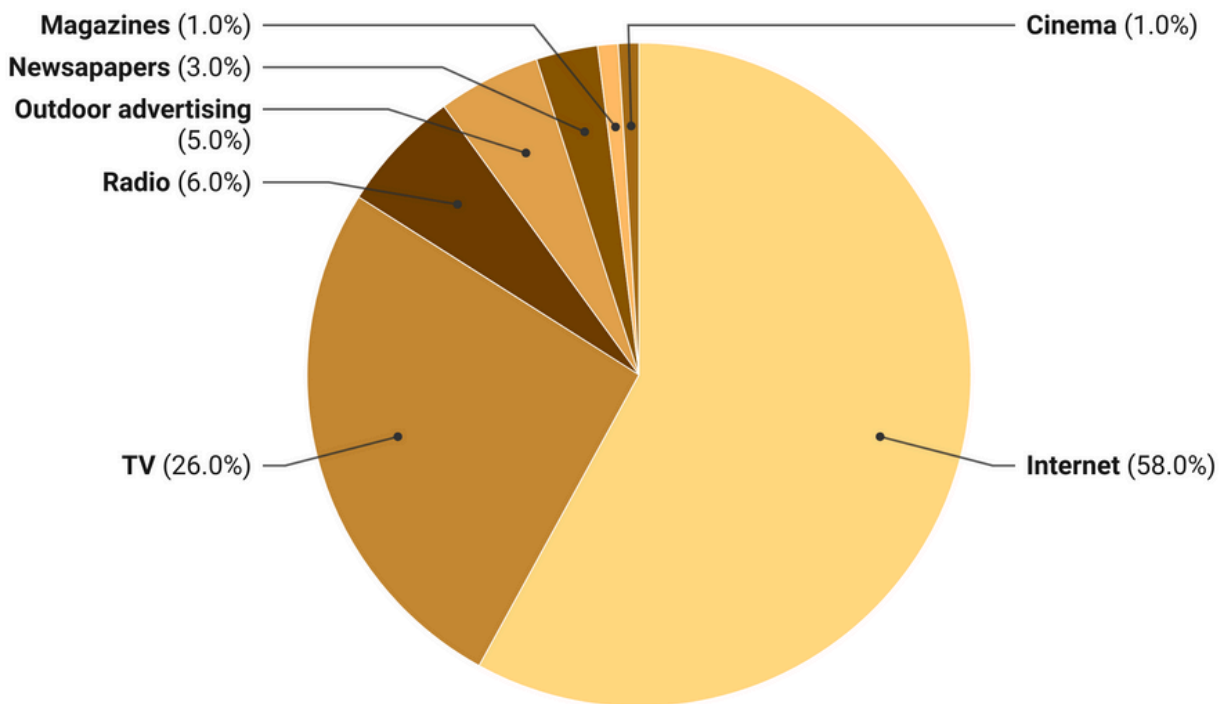


Source: Authors’ own estimates based on data from Merca 2.0, 2011 • Created with Datawrapper

[115] COFECE. (2023). Cofece emplaza a empresa por probables prácticas anticompetitivas en el mercado de servicios de publicidad digital. <https://www.cofece.mx/cofece-emplaza-a-empresa-por-probables-practicas-anticompetitivas-en-el-mercado-de-servicios-de-publicidad-digital/>

This shift in the advertising market has had a significant impact on the former television duopoly formed by Grupo Televisa and Televisión Azteca[116]. Televisa reported net losses of MXN 918.5m (US\$ 53.2m) in Q3 2023, due to the decline in subscribers of its pay-TV companies (IZZI and SKY). Its shares on the Mexican Stock Exchange (BMV) also registered their lowest historical value during that period. TV Azteca reported a financial debt of MXN 528m (US\$ 27m) at the end of 2022. In June 2023, BMV suspended the listing of its shares. The company’s subsidiary in the U.S., Azteca America, ceased to operate on December 31 2022, after 22 years of broadcasting. Likewise, local Mexican media (especially the written press) are in a precarious situation, and many local newspapers and television stations are beginning to disappear.

Advertising spending by media segment in Mexico, 2022



Source: Authors’ own estimates based on data from PWC, 2023 • Created with Datawrapper

[116] For the past five years, Grupo Televisa’s main revenues and profits have come from its telecommunications businesses, particularly pay-TV.

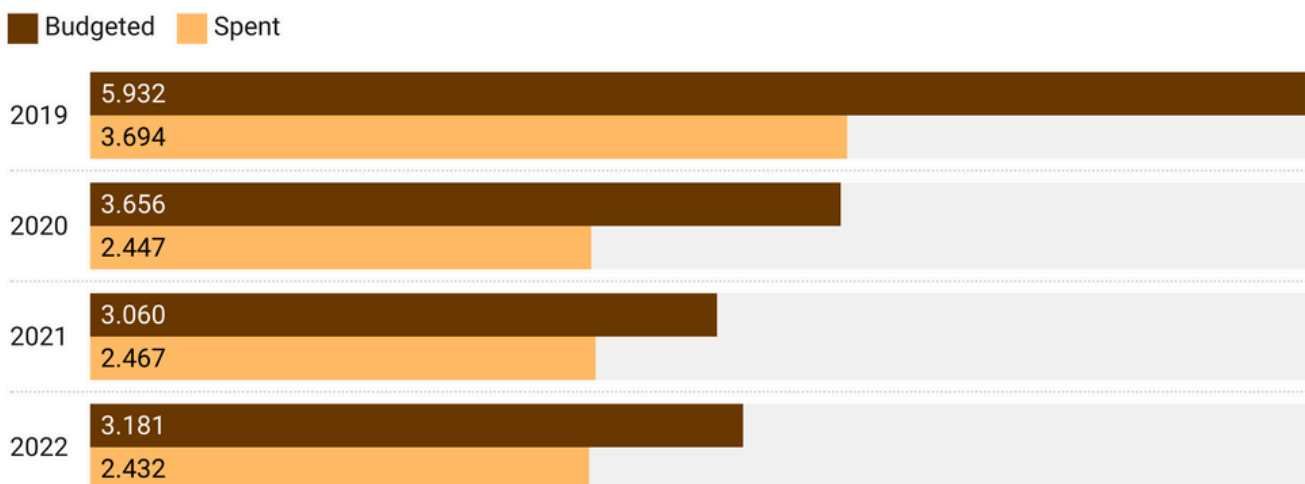
The federal government, headed by Andrés Manuel López Obrador (AMLO), has significantly reduced the budget allocated to state advertising since 2019, which has greatly impacted the financial viability of the media sector.

In the previous six-year mandate, government spending on official state advertising was identified as one of the most important issues affecting Mexican media, due to its political-clientelistic nature [117]. There was a clear lack of regulation dictating how the spending should be allocated, and no precise objectives shown in the communication campaigns on which these funds were spent.

In fact, the AMLO manifesto committed itself to enacting a clear and transparent regulation on state advertising. However, this law never materialized, and methods of allocating public resources to the media have not improved under the current administration. Therefore, the tendency to benefit the privileged club of ten media operators, in which Televisa and TV Azteca continue to stand out, has been maintained. Since 2018, the government has underspent the allocated media budget with no accountability for the unspent money [118]. This situation contrasts with the previous administration of Enrique Peña Nieto (EPN), between 2013 and 2018, when overspending of state funds on advertising was rather common.

State advertising expenditure in Mexico, 2019-2022

MXN, in billions



Source: Article 19 (2023) • Created with Datawrapper

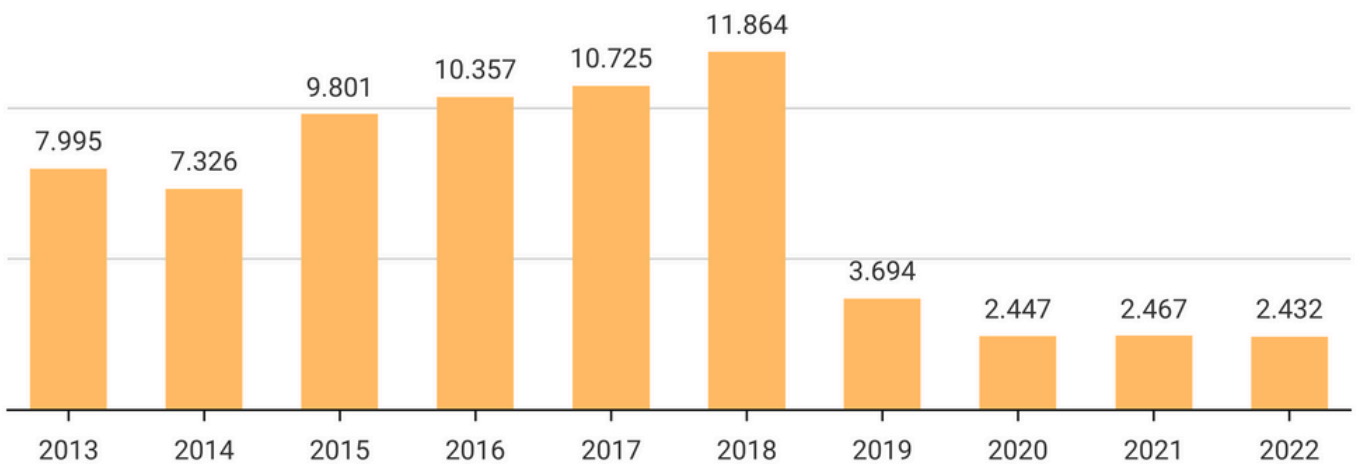
[117] Rubén Arnoldo Gonzalez Macias. (2015). Economically-driven partisanship—official advertising and political coverage in Mexico: The case of Morelia. *Journal of Latin American Communication Research*; Rubén Arnoldo Gonzalez Macias. (2017). Entre la espada y la pared: violencia y publicidad oficial como obstáculos para la modernización del periodismo mexicano. *Argumentos*, 30(85), 159-174; Martín Echeverría. (2017). Sesgo partidista en medios informativos. Una crítica metodológica y propuesta. *Comunicación y sociedad*, (30), 217-238

[118] Article 19. (2023). La publicidad oficial en 2022: menos gasto, misma opacidad. <https://articulo19.org/la-publicidad-oficial-en-2022-menos-gasto-misma-opacidad/>; Rodrigo Gómez. (2021). El Sistema de Medios Mexicano y la publicidad oficial en el contexto de la cuarta transformación; Julio Juárez. (Ed.) *Ensayos sobre comunicación gubernamental en la Cuarta Transformación ¿cambio o continuidad?* Ciudad de México: UNAM-CEIICH.

The AMLO administration broke the trend of excessive spending on state advertising, in contrast to the EPN government which spent around MXN 11bn (US\$ 560m) in its last year in office and MXN 62bn (US\$ 3.15bn) during its entire six-year term [119]. In fact, one of AMLO’s electoral campaign proposals promised to cut state advertising expenses by 50% during the first year and to stabilize expenditure at one third of the amount spent during the last year of the EPN administration. This timeline was based on the intention not to affect the financial viability of media, especially radio and print.

State advertising expenditure in Mexico, 2013-2022

MXN, in billions



Source: Authors’ own estimates based on data from Article 19, Fundar and El Pais • Created with Datawrapper

Another aspect that is important to briefly highlight in this introduction is the state of public media in Mexico. After the 2013 constitutional reform on telecommunications, there was an expectation of media consolidation in terms of editorial independence, universal coverage, and an adequate budget allocation to offer quality informative, educational, and cultural content.

At the same time that the Federal Telecommunications and Broadcasting Law of 2014 was enacted, the Law of the Public Broadcasting System of the Mexican State was published. Therefore, the “Public Broadcasting System of the Mexican State”, (Sistema Público de Radiodifusión del Estado Mexicano, SPR) was created. The newly born independent entity was endowed with its own legal personality and assets, as well as full technical and operational decision-making autonomy.

[119] Rodrigo Gómez.(2021). El Sistema de Medios...cit.

SPR joined other federal public media, such as: Canal Once, of the National Polytechnic Institute (*Instituto Politécnico Nacional, IPN*); Canal 22, attached to the Ministry of Culture; the Mexican Radio Institute (*Instituto Mexicano de la Radio, IMER*); and Radio Educación, run by the Ministry of Culture, with the purpose of strengthening the public sector and enriching the country's media.

The so-called public media system in Mexico consists of channels belonging to the judiciary and Congress, as well as 28 state-level public media broadcasters, and as many university channels, in addition to the public media listed above. La Red México (formerly Red de Radiodifusoras y Televisoras Educativas y Culturales de México), which has 91 members, is the blanket name for this group[120].

Finally, with the implementation of the Federal Telecommunications and Broadcasting Law of 2014, a legal base was created for the third communication sector. Since then, individuals or organizations interested in operating non-profit communities and social media have had access to broadcasting licenses. Thus, one of the historical demands of civil society to democratize the Mexican media system was achieved[121]. Up to the first semester of 2023, the IFT has granted 493 broadcasting licenses (321 social, 145 community and 27 indigenous) and 25 telecommunications licenses (21 social and 4 indigenous). However, there is still a big gap in relation to community media outlets, which continue to struggle to operate. Above all, much more accurate and focused public policies are needed to guarantee their financial sustainability and vital updates to infrastructure. These are necessary for exercising and enabling the rights of freedom of expression, access to information, communication and self-determination in the third sector, in addition to reflecting the linguistic plurality, cultural diversity and different lived realities of the Mexican Republic[122].

[120] La Red. (2024). <https://www.redmexico.org.mx/>

[121] Rodrigo Gómez. (2018). The Mexican third sector of the media: The long run to democratise the Mexican communication system. *tripleC: Communication, Capitalism & Critique. Open Access Journal for a Global Sustainable Information Society*, 16(1), 332-352.

[122] In this regard, AMARC and Observacom worked on a document entitled "The economic sustainability of community and indigenous radio broadcasting. Scope and limits of the Federal Law of Telecommunications and Broadcasting." This text presented guidelines for the implementation of public policies to support the sustainability of community media from a multidimensional approach. We also highlight that in 2020, at the initiative of the Mexican government and UNESCO, the Country Team was set up to develop a project to strengthen community and indigenous radio stations in Mexico. After several months of work, the document was presented in 2022. For more information, we recommend consulting the following UNESCO page: <https://es.unesco.org/mediosindigenasycomunitarios>.

In conclusion, the Mexican media system is in a period of significant change, since the entry of new players, such as digital platforms led by social media and subscription video on demand services, are affecting its logic and dynamics at an economic level. This requires adjustments to be made to the traditional business model. This has been impacting both large Mexican multimedia groups and medium-sized and smaller media companies. However, as has happened in other countries, the problem is self-inflicted. In the Mexican case, it is the result of decades of high market concentration protected by political power, a lack of innovation and production of quality content, as well as hyper-commercialization and the predominance of corporate values over journalistic ethics[123].

At the same time, the interaction of these transformations with political events, such as the alternation of power, is generating palpable modifications in media practices. This context of dynamic and, at times, chaotic change has given rise to evident tensions between the exercise of press freedom, the emergence of a pluralistic but polarized press, and the growing eruption of disinformation campaigns. All together, these elements have had a notable effect on public trust in journalistic media.



[123] Dwayne Winseck. (2022). The Broken Internet and Platform Regulation: Promises and Perils. Terry Flew and Fiona Martin (eds.) Digital Platform Regulation: Global Perspectives on Internet Governance. Palgrave, 229-256.

Media consumption patterns

In Mexico, cultural and information consumption has been changing very fast, experiencing a significant acceleration driven by the digitization that unfolded during the Covid-19 pandemic. However, due to structural issues and ingrained cultural practices, the changes experienced in Mexico have been slower compared to other countries and regions. For example, television has maintained its prominent position in relation to news and entertainment consumption. According to ENCA of the IFT, for the year 2022, 94% of Mexican households own a TV set, of which 54% only have free-to-air television and mostly watch news shows (64%), movies (45%), educational programmes (35%), telenovelas (22%), cartoons (20%), sports (12%), and series (9%), among other programs. Another striking fact is that, of the 46% who answered that they have pay-TV, 68% also said that they watch free-to-air TV channels via this platform.

Similarly, the ENCA shows that the device most used to watch content on the internet is the mobile phone (89%), which illustrates the multi-screen and atomized consumption of both news and entertainment. In this sense, the same survey reports that the most consumed content on the internet consists of: movies (52%), series (42%), educational content (40%), tutorials (24%), music videos (17%), documentaries (13%), news (8%), cartoons (8%), comedy videos (7%) and sports (4%).

This data from IFT's ENCA shows that Mexicans prefer to be informed through television broadcasts, while their consumption of movies and series is migrating or being complemented by handheld devices. Thus, fiction consumption is increasingly oriented to an individual and atomized experience, while news consumption still takes place on the common screen: TV.

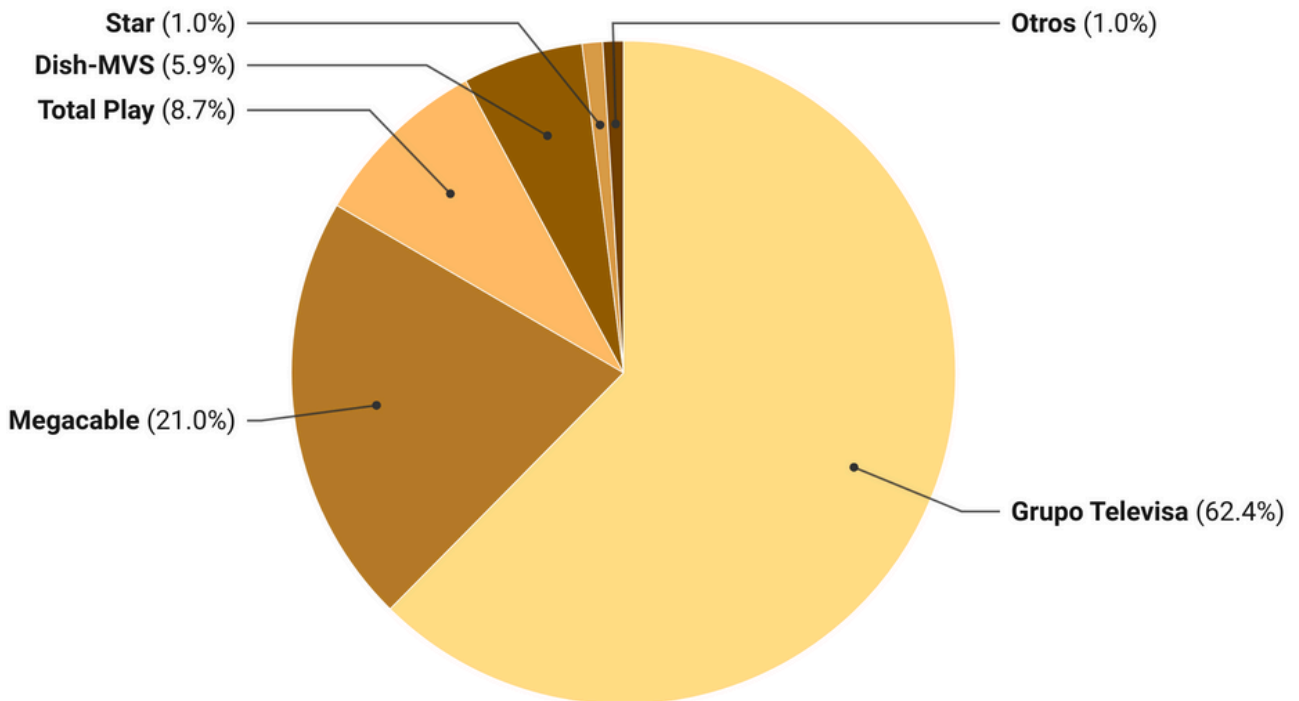
At the end of 2022, pay-TV had a household penetration of 58% in Mexico, which has been decreasing since 2018 due to the arrival of subscription video-on-demand (SVOD) platforms. Nevertheless, pay-TV continues to be important in Mexico because it offers a large number of local, regional and international news channels.

Pay-TV in Mexico is supported by satellite technologies such as DTH (Direct-to-Home), cable, and IPTV (Internet Protocol Television). Of the total number of pay-TV subscribers, 49% use cable, 42.3% use DTH, and the remaining 8.8% use IPTV.

This market presents a consolidated structure among five players: Grupo Televisa, Megacable, Totalplay, Dish-MVS and StarGroup, but with a high concentration by Grupo Televisa (GT) that attracts 62.4% of subscribers. In fact, in 2020, the IFT declared GT to have substantial power in 35 relevant markets; however, GT appealed and won before a specialized court in telecommunications and broadcasting matters. The court ruled to dismiss the IFT’s initial finding and ordered it to perform a new prospective analysis considering the context of new market trends and other consumption patterns of restricted audio and video services, as well as the effects of on-demand content provider platforms[124].

In short, pay TV is expected to decline, due to new audiovisual consumption and competition, such as subscription video on demand (SVOD), transactional video on demand (TVOD), ad-supported video on demand (AVOD), and free ad-supported streaming television applications (FAST).

Pay-TV market share in Mexico, 2021



Source: Authors’ own estimates based on data from IFT 2023, p.28 • Created with Datawrapper

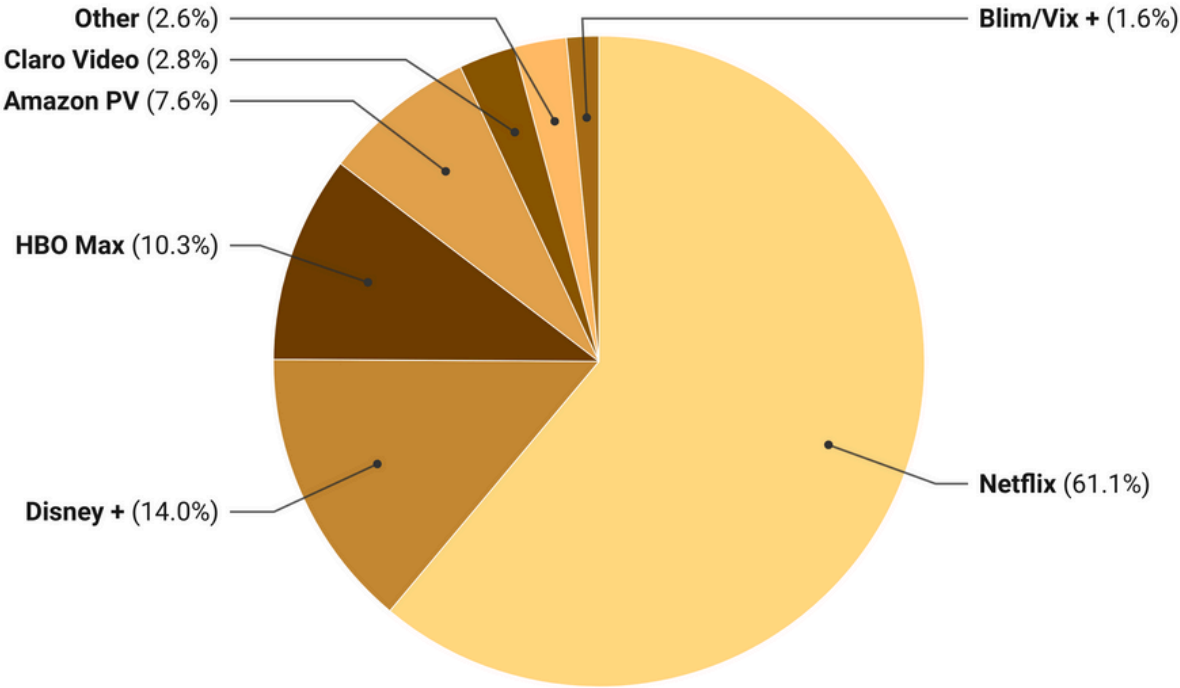
[124] Expansión. (2022). Televisa obtiene la invalidación de la declaratoria de poder sustancial. <https://expansion.mx/empresas/2022/10/26/televisa-obtiene-la-invalidacion-de-la-declaratoria-de-poder-sustancial>.

In this sense, it is important to mention the growth of SVOD services in the Mexican cultural media consumption, to have a complete map of both audiovisual cultural consumption and the different content providers. These services, although they do not have news programs, do offer a solid catalog of documentaries which review historical, political, economic and cultural aspects of society.

The dominant SVOD companies in Mexico are Netflix, Disney+ (including Star+ [125]), HBO Max, Amazon Prime Video, Paramount+, ClaroVideo, and Vix+ (formerly Blim). At the end of 2022, there were 12.6 million subscribers to an SVOD company in the country, which is equivalent to around 56 million Mexicans having access to a video portal of original content[126].

According to The Competitive Intelligence Unit (CIU), the SVOD market is dominated by Netflix, with more than 60% of subscribers, followed by Disney+, Amazon Prime Video, HBO Max, and the Mexican platforms Claro video and BlimTv/Vix+.

Market share of SVOD companies in Mexico, 2022



Source: Authors’ own estimates based on data from: Camargo, R (2022) “Mercado de contenidos por suscripción al 2T-2022: Crecimiento y preferencia de plataformas” • Created with Datawrapper

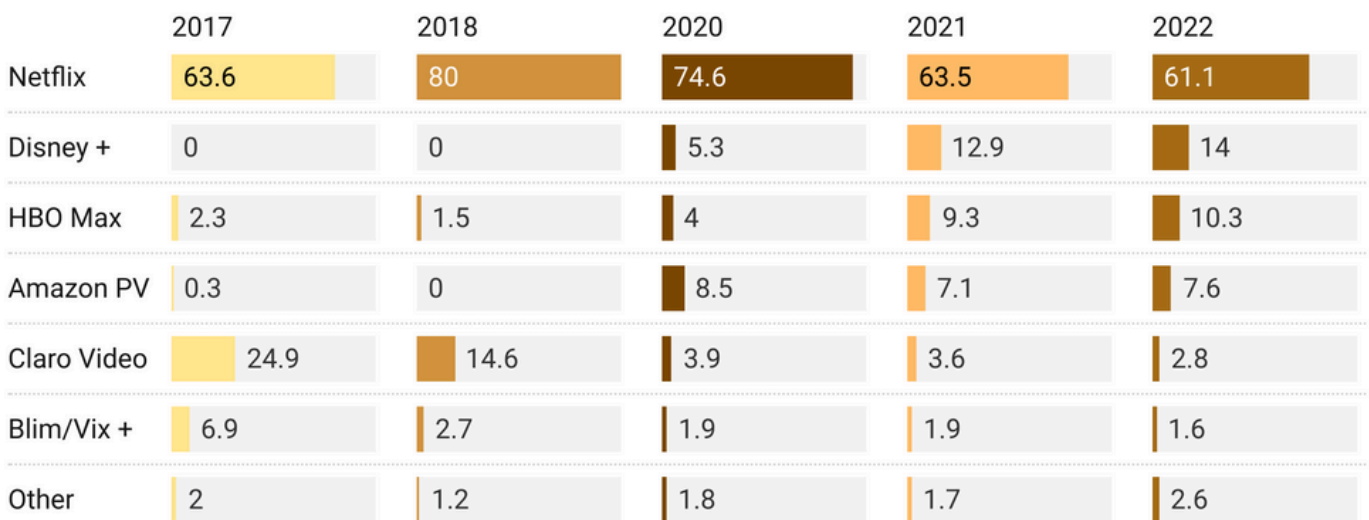
[125] In Mexico, the Disney Company offers two SVODs, the best known being Disney+ and the second Star+, which offers adult content from 20th Century Studios, ABC, Hulu and ESPN’s live sports.
 [126] Ernesto Piedras. SVOD en México: Competencia y Nueva Estrategia Tarifaria. 20 October 2022. El Economista.www.eleconomista.com.mx/opinion/SVOD-en-Mexico-Competencia-y-Nueva-Estrategia-Tarifaria-20221019-0170.html.

Netflix’s market share has been declining significantly in percentage points since 2020, since new players entered the Mexican market, but its subscriber base has not decreased. The explanation is that, according to a study by CIU, 44% of subscribers to these services say they subscribe to more than one SVOD service. However, another study reveals that six out of 10 SVOD users are not account holders, i.e. they use a shared account[127].

The Mexican SVOD market has not been regulated so far. For obvious reasons, U.S. technology giants, led by Netflix, are lobbying to keep this situation going for as long as possible.

Moreover, the Mexican SVOD market is dominated by U.S. companies. The two Mexican companies have seen their shares in this market diminish, especially Claro Video of América Móvil. For its part, Televisa, after the merger with Univision and the launch of its Vix platform, aspires to compete in this new battle. Televisa’s strategy is anchored mainly in the exclusive offering of sports events such as Mexican soccer and the Mexican national soccer team. Likewise, its extensive and historic catalog of original content is its main strategy to win subscribers, not only in Mexico, but in all Spanish-speaking countries.

Market share of SVOD companies in Mexico, %, 2017-2022



Source: Authors’ own estimates based on data from CIU 2017, 2018, 2020, 2021, 2022 • Created with Datawrapper

[127] Radamés Camargo. Hábitos de contratación de plataformas de video bajo demanda por suscripción (SVOD) en México. 24 October 2022. The CIU. <https://www.theciu.com/publicaciones-2/2022/10/24/hbitos-de-contratacin-de-plataformas-de-video-bajo-demanda-por-suscripcin-svod-en-mxico>

In terms of news consumption, as mentioned above, television is the main source of information for Mexican audiences, and nationwide networks have the highest viewer count. In this genre, the prime-time nightly newscasts of Televisa, TV Azteca and Imagen Televisión stand out. Likewise, we highlight the free-to-air all-news channels, where we identify Televisa’s Foro TV, TV Azteca’s ADN 40, and Grupo Imagen’s Excelsior TV. In addition, Milenio TV, Telefórmula, and CNN en Español are pay-TV channels that broadcast nonstop news in Spanish.

There are some nationwide radio stations broadcasting news programs with considerable audience ratings. Here, the morning and midday news programs stand out, since these are the peak times for driving. We have identified the following as the most important networks in this area: Radio Fórmula, W Radio, Stereo Cien, La Octava (Radio Centro), MVS Noticias, Imagen Radio, 88.9 Noticias, Radio Educación, and El Heraldo Radio.

Data provided by the National Directorate for News Media (Directorio Nacional de Medios Informativos, DNMI), following the findings of the Consorcio de Investigación para México of the World Journalism study, show an unprecedented number of 2,510 different news media in Mexico, of which around 45% are digital[128].

Regional media concentration

Region	Number of media outlets	Share (%)
Northwest	292	12
Northeast	406	16
West	527	21
Central	579	23
Southeast	709	28
Total	2,510	100

Source: González, R., et.al (2023, p. 100) • Created with Datawrapper

[128] Rubén Arnoldo González Macías et al. (2023).Panorama de los medios informativos..., cit.

The media subsystems in Mexico are moving towards digital media, which are dominant in all regions. The Western region, composed of eight states (Aguascalientes, Colima, Guanajuato, Jalisco, Michoacán, Nayarit, Querétaro, and Zacatecas) stands out, concentrating around 60% of the news media. On the other hand, the Northwest region consisting of Baja California, Baja California Sur, Chihuahua, Sinaloa, and Sonora, has the lowest percentage of digital media with 33.9%, according to data from the DNMI[129].

These two regions (in socioeconomic terms) are among the richest regions of the country, and one might think that they are similar in some socio-cultural and political aspects. However, their news media ecologies are different; it must also be said that the Northwest region is the least populated and is the largest in Mexico. On the other hand, regarding similarities, both regions have the lowest percentage of printed newspapers.

The regions that account for the highest number of print newspapers are the Central zone, consisting of Mexico City, State of Mexico, Guerrero, Hidalgo, Morelos, Puebla. and Tlaxcala; and the Northeast, consisting of Coahuila, Durango, Nuevo Leon, San Luis Potosi. and Tamaulipas. This situation could be attributed to the economic and political relevance of Mexico City and Monterrey and their regional influence, according to the DNMI.

The Southeast zone, consisting of Campeche, Chiapas, Oaxaca, Quintana Roo, Tabasco, Veracruz, and Yucatan, is the least socioeconomically developed region of the country, concentrating the largest number of media, a total of 706 outlets. Here, the states that stand out are Veracruz (180) and Oaxaca (141), the former being the state with the largest number of media at national level and the latter the fourth-largest[130].

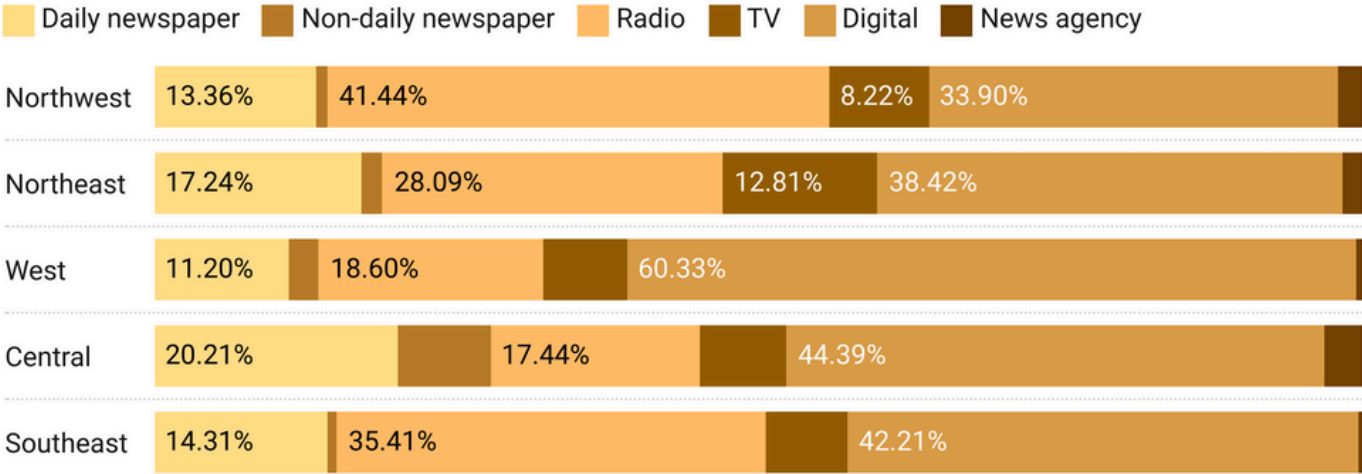
Another significant characteristic of the Mexican media system is its centralization, since Mexico City (162) and the State of Mexico (125) together account for around 11.5% of the country's media. They are followed by Tamaulipas (157), a less developed state than the aforementioned, which surprisingly ranks third. The states with the lowest concentration of media are those with the lowest population, with the exception of Sinaloa[131].

[129] Rubén Arnoldo González Macías et al. (2023). Panorama de los medios informativos..., cit., p. 100.

[130] Rubén Arnoldo González Macías et al. (2023). Panorama de los medios informativos..., cit., p. 102.

[131] Rubén Arnoldo González Macías et al. (2023). Panorama de los medios informativos..., cit., p. 101.

Distribution of media types by region in Mexico, 2023



Source: Authors' own estimates based on data from González, R., et.al (2023, p. 100) • Created with Datawrapper

When it comes to trust in the media, the news programs of free-to-air television channels Televisa and TV Azteca, which reportedly boast the largest audiences in Mexico, appear at the bottom of a list ranking the level of public trust. The third largest free-to-air television network, Imagen Televisión, which started broadcasting in 2018, ranks higher in public trust than Noticieros Televisa and TV Azteca Noticias, a sign of erosion of confidence in historical TV stations and improved perception of newly emerging media channels.

CNN's Spanish-language news channel, available on pay-TV platforms, has topped this list every year since 2020, while Aristegui Noticias, a program broadcast online and on the radio, which led the level of trust in 2018 and 2019, has dropped considerably since 2020. In May of that year, radio listeners sent an open letter to the journalist Cármen Aristegui, the program producer, requesting greater plurality in her radio program[132], following a series of constant critical remarks made by President Andrés Manuel López Obrador about Aristegui's editorial agenda. This is believed to have had a negative impact on the trust of her audiences. The loss of trust is exacerbated by increased competition from a growing offering of left-wing online news programs, such as Sin Embargo, Contralínea and Astillero Informa, to mention just a few.

[132] Aristegui Noticias. (2020), Carta Abierta a Carmen Aristegui. <https://aristeguinoicias.com/2005/mexico/carta-abierta-a-carmen-aristegui-documento/>

In general, print media seems to be more trustworthy than television, radio and online media in Mexico. Nevertheless, the newspaper Reforma has experienced a decline in trust after President López Obrador openly criticized the publication in his morning conferences, for lacking rigor and acting as an opposition medium to his government.

Finally, only one radio station, Radio Fórmula, and one public television media outlet, Channel 22, appear in the trust ranking, which is otherwise dominated by print media outlets and digital media. The ranking does not include any newspapers closer to the political left, or with an editorial agenda focused on social justice such as La Jornada.

Ranking of Mexican media by public trust, 2018-2023

Peach: Free-to-air television; Crimson: Pay-TV; Green: Daily print media; Orange: Radio; Blue: Digital

	2018	2019	2020	2021	2022	2023
1	Aristegui	Aristegui	CNN	CNN	CNN	CNN
2	El Universal	El Financiero	Aristegui	El Universal	Milenio noticias	El Universal
3	El Financiero	El Universal	El Universal	Milenio noticias	El Universal	El Financiero
4	El Economista	El Economista	Milenio noticias	Imagen Noticias	Imagen Noticias	Milenio noticias
5	Reforma	Canal 22	Imagen Noticias	El Financiero	El Financiero	Imagen Noticias
6	Canal 22	Radio Fórmula	El Financiero	Radio Fórmula	El Economista	Radio Fórmula
7	Radio Fórmula	Imagen Noticias	Canal 22	El Economista	Radio Fórmula	El Economista
8	Imagen Noticias	Reforma	Radio Fórmula	Canal 22	Reforma	Aristegui
9	UnoTV	UnoTV	Reforma	Aristegui	Canal 22	Canal 22
10	SinEmbargo	TV Azteca Noticias	UnoTV	Reforma	Aristegui	Reforma
11	TV Azteca Noticias	SinEmbargo	TV Azteca Noticias	UnoTV	UnoTV	UnoTV
12	Noticieros Televisa	Noticieros Televisa	Diario Local	Diario Local	Diario Local	Diario Local
13	No report	No report	Animal Político	Animal Político	TV Azteca Noticias	TV Azteca Noticias
14	No report	No report	Yahoo!	TV Azteca Noticias	Animal Político	Noticieros Televisa
15	No report	No report	Noticieros Televisa	Noticieros Televisa	Noticieros Televisa	Latinus

Note: Aristegui is a combination of digital y radio.

Source: Authors' own estimates based on data from Reuters Institute Oxford, Digital News Reports 2018, 2019, 2020, 2021, 2022, 2023, project funded by Google • Created with Datawrapper

According to the Digital News Report: Mexico, a research project financed by Google, social media remains the main source of news for internet users in Mexico. The report also shows that trust in news has generally been declining in Mexico: from 49% in 2018 to 36% in 2023[133]. It also found a increased use of the main social media and messaging applications for news consumption, with Facebook (56%), YouTube (39%), and WhatsApp (30%) being the most used, followed by TikTok (15%), X (formerly Twitter) with 15%, and Instagram (14%)[134]. However, it's important to note that the news curated and disseminated by social media is mostly generated by nationwide and local media.



[133] María Elena Gutiérrez-Rentería. (2023). México, en Digital News Report 2023. Reuters Institute, University of Oxford. p.121. https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2023-06/Digital_News_Report_2023.pdf
 [134] María Elena Gutiérrez-Rentería. (2023). México...cit.

Main players

The Mexican media system is dominated by a clutch of media conglomerates, which operate several media outlets and, in some cases, telecommunications networks, as is the case of Grupo Televisa and Grupo Salinas, owner of Televisión Azteca. Telmex/América Móvil is prohibited, through its license conditions, from operating free-to-air television channels or pay-TV chains in Mexico [135]. In spite of those limits, thanks to an agreement with Grupo Multimedios, the group operates some pay-TV channels such as Claro Sports and its news portal, UnoTV, aired online and on MVS TV, a channel available on free-to-air television in several cities. This agreement also makes it available on digital channels. These three groups are the main players on the market, with a long history that includes some ventures, at different times, into the United States and other Latin American markets.

Telmex/América Móvil and Grupo Televisa stand out in terms of coverage, as the former operates in 17 countries in the Americas, being the leader in fixed and mobile telecommunications and in the pay-TV sector in several of these countries. Its best-known corporate identity in South America is Claro. In addition, through its subsidiary Telekom Austria Group, it operates in eight European countries. Thus, Telmex/América Móvil is a regional player with networks that have transnational reach, and which belongs to Grupo Carso, headed by billionaire Carlos Slim Helú.

Grupo Televisa has historically stood out as the most important television group and content producer in Mexico. Currently, following its merger with Univision, the TelevisaUnivision conglomerate intends to consolidate its dominance in Spanish-language content in both the United States and Latin America through its VIX+ platform, which offers SVOD and AVOD packages. Grupo Televisa also operates telecommunications networks in Mexico and competes with Telmex in the home broadband and fixed-line telephone service market. It is also the leading company on the pay-TV market through its companies IZZI (cable) and SKY (DTH).

[135] Gabriel Sosa. (2017). América Móvil. In Birkinbine, Gómez & Wasko (eds.) *Global Media Giants* (pp. 125-143). Routledge.

Grupo Televisa’s role in journalism has been controversial, since it established a monopoly on the market in 1970 that lasted until 2000, the year when the Institutional Revolutionary Party (Partido Revolucionario Institucional, PRI) lost the Mexican presidency. The broadcaster was said to serve the interests of the PRI government, especially through the editorial coverage of its flagship news programs on Canal de las Estrellas (Channel 2). However, in other newscasts run by the chain, for example on secondary channels and outside the prime time slots, some voices critical of the government were given space. This was either an attempt to reach wider audiences and promote editorial pluralism, or to whitewash its subordination to political power.

The death of Emilio “El Tigre” Azcárraga Milmo in 1997, father of the current owner of the group, led to a 180-degree turn in Televisa’s corporate culture and collusion with the PRI-led government, in line with the democratic changes that year in Mexico[136].

Since it started operating in 1993, TV Azteca has been generally characterized by yellow journalism with a conservative and pro-business editorial line[137]. The broadcaster’s newscasts are titled “Hechos” (Facts). A particular standout is the newscast “Hechos Noche” (Night Facts), hosted by Javier Alatorre, an anchorman who has been at the helm since the beginning of its broadcasting.

Grupo Imagen, MVS Comunicaciones, Grupo Multimedios and Grupo Radio Centro have also established an important presence, owning several media outlets at a regional and, in some cases, national level. Only two of the main media groups in the country have their headquarters outside Mexico City: Multimedios and Megacable, based in Monterrey and Guadalajara respectively.

Both Televisa and Azteca have local news programs produced or aired through their subsidiaries and re-broadcasters in the country’s largest cities, including Guadalajara, Monterrey, Veracruz, Puebla, and Morelia, which also helps them shape the news agenda at state and local levels.

Grupo Imagen, MVS Comunicaciones, Grupo Multimedios and Grupo Radio Centro have also established an important presence, owning several media outlets at a regional and, in some cases, national level. Only two of the main media groups in the country have their headquarters outside Mexico City: Multimedios and Megacable, based in Monterrey and Guadalajara respectively.

[136] Rodrigo Gómez. (2017). Grupo Televisa. En Birkinbine, Gómez & Wasko (eds.) *Global Media Giants* (pp. 111-124). Routledge; Gabriel Molina. (1987). Mexican television news: the imperatives of corporate rationale. *Media, Culture & Society*, 9(2), 159-187; Andrew Paxman. (2015). Mexican Democracy’s Awkward Partner: Televisa as a de facto Power. *Mexico in Focus: Political, Environmental and Social Issues*, edited by José Galindo Rodríguez, 393-408; Raúl Trejo. (1985). *Televisa, el quinto poder*. Ciudad de México: Claves Latinoamericanas.

[137] Rodrigo Gómez. (2004). TV Azteca y la industria televisiva mexicana en tiempos de integración regional (TLCAN) y desregulación económica. *Comunicación y Sociedad*, (1), 51-90.

When it comes to the regional media market, it is worth mentioning the Albavisión group, which has been operating 12 digital terrestrial television stations in the southeast region of Mexico since 2017, through the Telsusa company and under the corporate brand of Canal 13. The group is owned by Ángel González González, better known as “El Fantasma”, a Mexican-Guatemalan businessman who owns different media outlets in 16 countries in Latin America and the Caribbean[138].

All three main media groups that operate national television chains broadcast a news channel. This is an indication that they see news as an asset in their business model, as well as in their relationship with political power. On the one hand, news boosts their profits as it drives advertising sales. On the other hand, news is used by these media outlets as a tool in negotiating with various political parties. Political parties and governments always expect positive coverage, both during electoral campaigns and in the day-to-day running of the government. In return, commercial broadcasters expect to receive money from state (official) advertising contracts that are awarded by the government.

The only public service media player that operates more than one broadcaster with regional coverage is the SPR, which runs Channel 14 with an outreach of 70% national coverage, and a string of radio stations run under the brand of Altavoz Radio.

AMLO’s administration has promoted the expansion of SPR’s coverage, in order to cover most of Mexico’s national territory and comply with the universal access principle specific to public service media. However, both its television broadcast and radio stations are still little known in Mexico. In addition, the president of SPR, journalist Jenaro Villamil, using his own interpretation of the Law of the Public Broadcasting System of the Mexican State, assumed the coordination of all public service media at the federal level – Canal Once, Canal 22, Instituto Mexicano de la Radio (IMER), and Radio Educación, stirring controversies among experts who claim that the legislation does not allow this.

[138] For more information on the entrepreneur we recommend: Gabriel Sosa. El Fantasma en la televisión mexicana. 22 August 2017. Sin Embargo. <https://www.sinembargo.mx/22-08-2017/3290057>

Some claim that while such coordination is desirable and necessary, it should not be led by the SPR, but rather through a rotating presidency of all public service media. Moreover, through his interventions in Channel 14 and in other public service media, the head of the SPR has turned into a fierce defender of AMLO's government, which is in contradiction with SPR's mandate, as stipulated in the SPR Law[139].

In fact, the most obvious proof of the pro-government editorial line at the SPR was the special news coverage of the "march for transformation" initiated by President López Obrador on 27 November 2022, to celebrate his fourth year in office. The coverage was carried out jointly by all federal public service media under the coordination of the SPR[140]. The "march for transformation" followed a large demonstration against the electoral reform proposed by the government of López Obrador which the opposition had organized a few weeks earlier, which was extensively covered by media outlets critical of the government[141].

Hence, through the SPR's coverage, the government sought to counterbalance the editorial policy of the commercial media, which persistently questioned the actions of the government during the entire administration of President López Obrador.

[139] Article 1 of the SPR Law states: "The decentralized public body of the Federal Public Administration, non-sectorized, called Public Broadcasting System of the Mexican State is created, endowed with legal personality and its own assets, as well as technical, operational, decision-making and management autonomy, which aims to provide the non-profit broadcasting service, in order to ensure access to the greatest number of people in each of the federal entities to content that promotes national integration, educational, cultural and civic training, equality between women and men, the dissemination of impartial, objective, timely and truthful information on national and international events, editorial independence and providing space for independently produced works, as well as the expression of diversity and plurality of ideas and opinions that strengthen the democratic life of society."

[140] Jorge Bravo. Perdimos los medios públicos. 2 December 2022. El Economista, <https://www.eleconomista.com.mx/opinion/Perdimos-los-medios-publicos-20221202-0027.html>

[141] Rodrigo Soriano & Daniel Alonso. Así le hemos contado la marcha contra reforma electoral de López Obrador. 13 November 2022. El País. <https://elpais.com/mexico/2022-11-13/marcha-contr-la-reforma-electoral-de-lopez-obrador-en-vivo-la-oposicion-sale-a-la-calle-a-defender-al-ine.html>.

Main media conglomerates in Mexico

Owner	Name	Free-to-air TV	Pay-TV	Radio	Print media	Digital /SVOD-AVOD	Telecommunications
Carlos Slim	Telmex/América Móvil		Claro Sports			Unotv/Claro video	Telmex/Infinitum (fijas), Telcel (Móvil)
Emilio Azcárraga	Grupo Televisa	Televisa Canales 2,4,5 y 9	IZZI y SKY (Varios canales de pago)			Televisa.com, SDP Noticias.com, Nmas.com/Vix+	Izzi (fijas y operadores móviles virtuales), Bestel
Ricardo Salinas	Grupo Salinas	TV Azteca; Canales 7,13 y 40	Total Play				Total Play (fijas)
Olegario Vázquez Raña	Grupo Empresarial Ángeles	Imagen Televisión Canal 3, Excélsior TV		Imagen Radio	Excélsior	Imagen Digital	
Fam. Vargas Guajardo	MVS Comunicaciones	MasTV Canal 6.3	Dish MX (- Canal 52)	Exa FM, La Mejor FM, FM Globo, Stereorey, Noticias MVS		Mvstv.com, Mvsnoticias.com	ON Internet (fijo y satelital), FreedomPop (OMV)
Fam. Robinson Bours	Megacable Comunicaciones		Megacable (-PCTV, -Mega), Noticias MX				Megamovil (OMV)
Francisco A. González Sánchez	Grupo Multimedios	Canal 6, Canal 8 (Costa Rica)	Milenio Noticias	La Lupe, La Caliente, Milenio Radio	Milenio, La Afición	MT.com, Telediario.mx	
Fam. Andrade	Heraldo Media Group	Canal 8.1		Heraldo Radio (98.5 CDMX)	Heraldo de México	Heraldodemexico.com.mx, Heraldodemexico.com.mx, Heraldousa.com	
Mexican State	Sistema Público de Radiodifusión del Estado Mexicano (SPR)	Canal 14		Altavoz Radio		Sprinforma.mx, Infodemia.mx, Mxplus.tv/television/tv-migrante, Mxplus.tv	

Source: Compilation by authors based on information gathered for this report • Created with Datawrapper

When it comes to gender balance in the media, the role of women in general remains marginal. There are no female owners or women in managerial positions in any media conglomerate. There are only a few women sitting on the board of directors of some media groups, and only one female director in the public media, Aleida Calleja, the head of the IMER. Various studies have highlighted the importance of including women in management positions to boost diversity and equality in the media[142]. According to the IFT based on data from March 2023, 58% of the total number of employees in the broadcasting industry are men[143]. The IFT carried out an analysis of 25 radio and television news programs aired over the course of five days, and subsequently found that women accounted for just 35% of news programs production personnel and 30% of news sources presented in these programs[144]. Another study found that young people, mainly men, dominate in Mexican journalism. The study highlighted the lack of diversity in the country's media, the generally low job security, and the growing vulnerability of journalists to attacks by private and state actors[145].



[142] Aimée Vega Montiel. (2014). Igualdad de género, poder y comunicación: las mujeres en la propiedad, dirección y puestos de toma de decisión. *La ventana. Revista de estudios de género*, 5(40), 186-212.

[143] IFT. (2023). Comunicados.

[144] IFT. (2023). Monitoreo de noticias desde una visión de género. https://somosaudiencias.ift.org.mx/sub-secciones/2#documento=https://somosaudiencias.ift.org.mx/archivos/Info_Monit_prog_deport_persptv_gen.pdf&id:34

[145] Frida Rodelo, et al. (2023). Periodistas en México: Encuesta de sus perfiles demográficos, laborales y profesionales. *Global Media Journal México*, 20(39), 110-159. <https://doi.org/10.29105/gmjmx20.39-512>

Television

The structure of free-to-air television in Mexico consists of three sectors: commercial television, public television, and community television. The latter includes social community and indigenous television. Since 2015, free-to-air television has been broadcast in digital (DTT)[146].

Commercial television concentrates the highest percentage of frequencies, mostly distributed among three groups: Televisa (Channels 2, 4, 5 and 9), TV Azteca (Channels 7, 13, 40 and Es más), and Imagen Televisión (Channels 3.1 and 3.2). Their licenses permit multiprogramming, which means broadcasting a total of four programs per channel. In other words, Televisa could broadcast 16 television programs, and TV Azteca 12 programs. They can even lease them, which means that the dominance of these companies could be even greater. However, with the rise of digital platforms and video-on-demand services, the business model of streaming television has entered into competition with these new players, prompting multiprogramming digital channels to act more cautiously.

A total of 835 digital terrestrial television (DTT) players were operational in Mexico in the first quarter of 2023[147]. Commercial television has the main share, with 547 licenses, followed by public television with 263 licenses and community television with only 36 licenses, only four of these held by social community stations.

Distribution of DTT concessions by television sector, December 2023

Sector	Licenses	%, 2023
Commercial	547	63,1%
Public	263	32%
Community	36	4,4%
Social Community	4	0.50%
Indigenous	0	0
TOTAL	835	100%

Source: Authors' own compilation based on information gathered for the research • Created with Datawrapper

[146] Mexico was the first Latin American country to make the analog switch-off, mainly due to its proximity to the United States of America. For more details on this process, see Rodrigo Gómez. (2020). El rol del Estado...cit.; Rodrigo Gómez et. al. (2011). Mapping Digital Media: Mexico. London: Open Society Foundations https://www.opensocietyfoundations.org/uploads/31cd147b-75ab-4f79-b9d9-99dae3e9ac83/mapping-digital-media-mexico-20130605_0.pdf

[147] IFT. (2020). Estudio diagnóstico del servicio de televisión radiodifundida en México. Unidad de Competencia, Dirección General de consulta económica. <https://www.ift.org.mx/sites/default/files/estudiodiagnosticodelserviciodetelevisionradiodifundida-resumenejecutivo.pdf>

Commercial television

The Mexican commercial television market has high levels of concentration. In 2014, the IFT designated Televisa as a dominant player in the broadcasting sector, with control of more than 50% of the screen time, frequencies, and advertising. As a result, the IFT imposed a set of measures to avoid further distortion of free competition on the market. They required Televisa to share its infrastructure and disclose to the IFT the terms and conditions of its advertising services, and prohibited the media group from acquiring relevant audiovisual content on an exclusive basis. This included the rights to broadcast the Mexican national football team, the finals or semifinals of the Mexican football league, the opening and closing ceremonies of the Olympic Games, or the final of the football World Cup.

Since 2014, the concentration in the commercial television sector has declined as a result of two public policies: the digital transition achieved in 2015, which made the use of radioelectric spectrum more efficient; and the enactment of the Federal Telecommunications and Broadcasting Law of 2014 which, among other things, set up the IFT. The newly established regulator made a series of decisions that have contributed to the decrease of the concentration in broadcasting[148].

Yet, the degree of media ownership concentration in Mexican broadcasting is still high by international standards. According to IFT data, Televisa had a 66.8% audience share in January 2014. A decade later, it had dropped to 56%, according to December 2023 data from Ibope-Nielsen. When it comes to the portfolio of broadcast frequencies, the concentration level has declined even more, Televisa now has less than 50 percent of all broadcast licenses awarded in the country. However, Imagen Televisión, which only operated on 63 frequencies at the end of 2023, will have to start operations on 60 more frequencies, in order to comply with a requirement in its broadcast license agreement to cover 92% of the Mexican territory. According to the latest audience data available, in September 2019 the main share of the audience market was commanded by Televisa (57.7%), followed by TV Azteca (31.7%), Imagen Televisión (6.35%), Multimedios (3.85%), and other broadcasters (0.4%) [149]. In recent years, the audience share has not registered significant changes, although some slight alterations were noticed due to the entry of a few new players.

[148] IFT. (2020). Estudio de diagnóstico del servicio de televisión radiodifundida en México. Unidad de competencia económica, Instituto Federal de las Telecomunicaciones. México. <https://www.ift.org.mx/sites/default/files/contenidogeneral/competencia-economica/estudiodediagnosticodeelserviciodetelevisionradiodifundida-completo.pdf>

[149] IFT. (2020). Estudio diagnóstico...cit.

Distribution of licenses by companies, 2023

Company	Licenses	Share of total number of licenses, %	Coverage share, %
Televisa (AEP-R)	249	41.0%	86.0%
TV Azteca	180	30.0%	84.0%
Imagen Televisión	123 (63)	20.0%	65.0%
Multimedios	14	2.2%	43.0%
Telsusa	14	2.2%	38.0%
Other	28	4.6%	42.0%
Total	608 (547)	100.0%	

Source: Authors' own compilation based on information gathered for the research • Created with Datawrapper

A series of tenders to license new broadcasters allowed the launch or expansion of new regional players, including three media groups. Firstly, Multimedios, which historically operated in the northeast of the country, and which has used its newly acquired licenses to strengthen its regional position and expand to the metropolitan area of Mexico City through Canal 6 and Milenio TV. Secondly, Grupo Radio Centro with La Octava Televisión, now Herald TV, which competes in the metropolitan area of Mexico City. Finally, Telsusa, which covers Mexico City and the southeast of the country with Canal 13.

As all the broadcasters have the possibility of using multiprogramming, some of them sublease frequencies to third parties. For example, Multimedios rents broadcast space to MVS Comunicaciones to air MVS, which runs the news program Uno TV, produced by one of Carlos Slim's companies. El Herald Media Group did the same with Imagen TV and, later, signed an agreement with La Octava to broadcast its channel Herald TV. Similarly, La Octava was broadcast via multiplex in the southeast region of the country through an agreement with Telsusa.

In addition to the changes triggered by the licensing of new broadcasters, the digital economy has also led to alterations in the Mexican television market. Grupo Radio Centro failed to enter the free-to-air television market; after only three years in operation, it had to sell its license to Heraldito Media Group, mostly as a result of its financial debts combined with its inability to produce quality, consistent and competitive programming on its flagship channel La Octava[150].

In spite of more competition on the television broadcast market, sparked by the entry of new players, no major changes have been noticed in the overall television programming. The newly entered players simply mimic the dominant players by producing similar, worn out and tested types of programs[151]. This does not improve the news plurality, as the programming formats on most commercial television channels are very similar. This is part of a strategy aimed at attracting state advertising, while their editorial lines tend to be favorable to the interests of the advertisers.

Public television

The public television sector has also experienced significant changes, following the establishment of the IFT in 2014 and the award of 153 public broadcast licenses. Having reached a total of 263 licenses by the end of 2023, the public television sector experienced growth at both national and regional levels.

The SPR received the highest number of licenses, to extend its coverage to the nationwide level and turn its channel 14 into a flagship television network. In addition, SPR is sharing both its tower and multiprogramming infrastructure to allow broadcasting of other public and university channels such as Once TV, Canal 22, Ingenio TV, and TV UNAM.

As new public broadcasters were launched in the Mexican states while the existing ones expanded, the public broadcasting sector both nationwide and at a regional level is, at least judging by the number of broadcast licenses and level of infrastructure deployment, in a phase of expansion and consolidation.

[150] IFT. (2023). Resolución mediante la cual el Pleno del Instituto Federal de Telecomunicaciones resuelve la solicitud de autorización de cambio de identidad de un canal de programación en multiprogramación, presentada por R.R. Televisión y Valores para la Innovación, S.A. de C.V., en relación con la estación de televisión radiodifundida XHFAMX-TDT, en la Ciudad de México y Área Metropolitana. <https://www.ift.org.mx/sites/default/files/conocenos/pleno/sesiones/acuerdolia/pift251023453.pdf>.

[151] IFT. (2020). Estudio diagnóstico..., cit.

On the other hand, institutional consolidation is going at a different speed. The principles of the public service stipulated in Article 86 of the Federal Law of Telecommunications and Broadcasting have not been fully complied with. They include financial management autonomy, guarantee citizen participation and espouse editorial independence. These broadcasters remain aligned, to a greater or lesser extent, to the political will and the interests of the government in office. Patricia Ortega blames the weak public service culture among the political class and society at large, as well as the lack of social and cultural roots in terms of the way these media outlets operate[152].

Distribution of public broadcast licenses, December 2023

Public media	Number of broadcast licenses	Share of the market (by number of broadcast license), %
SPR (Canal 14)	61	23.2%
Once TV	61	23.2%
Estado de Sonora (Telemax)	54	20.5%
Televisión de Nuevo León (Canal 28)	24	9.1%
Corporación Oaxaqueña de Radio y Televisión	16	6.0%
Sistema Michoacano de Radio y Televisión	13	4.9%
Other	34	13.0%
Total	263	100.0%

Source: Authors' own compilation based on information gathered for the research • Created with Datawrapper

[152] Patricia Ortega. (2020). Medios Públicos: no sin sociedad. Avances y limitaciones en su regulación, in Rodrigo Gómez (ed.) A seis años de la Ley Federal de Telecomunicaciones y Radiodifusión. Análisis y propuestas, Ciudad de México: Tintable-Amedi.

Main television broadcasters

Televisa

Televisa is the most influential media company in Mexico. Founded in 1955, it is the world's leading producer of Spanish-language audiovisual content.

Televisa has four free-to-air television channels and several cable channels, and operates fixed and mobile telecommunications services through its subsidiaries, including IZZI. Its programming spans a wide variety of genres, ranging from soap operas and entertainment programs to news and sports. Historically, because of its 20-year monopoly position, it is the most influential media company both in society and in politics[153].

Grupo Televisa has played a significant role in the Latin American television industry and has expanded its influence through strategic alliances and the export of its products internationally. The latest significant move by Emilio Azcárraga Jean's company was its merger with the leading Spanish-language broadcaster in the United States, Univision, which led to the emergence of the conglomerate Televisa-Univision, which operates in the United States and Mexico. The group's main objective is to become the leader in the distribution of Spanish-language content worldwide through its video streaming platform Vix+.

Televisión Azteca

Founded in 1993, Azteca is the second largest television channel network in the country and currently operates four free-to-air channels: Azteca Uno, Azteca 7, ADN 40 and A más. The channels offer a wide variety of programming, including telenovelas, entertainment programs, news and sporting events. Televisión Azteca shared the TV advertising market in a duopoly with Grupo Televisa from 1993 to 2016, until Imagen Televisión was incorporated. Over the years, Televisión Azteca has developed a global presence by exporting its programs to various international markets. Its editorial line has been very controversial, as it presents a conservative view, and the broadcaster's owner, Ricardo Salinas Pliego, stands out for his high profile and open confrontation with those who affect his interests[154]. The company also operates television channels in Guatemala and Honduras. At the beginning of 2023, it had to cease operations of its Azteca America channel in the United States due to financial problems, after competing with Univisión and Telemundo for 22 years to attract Hispanic audiences in the U.S.

[153] Rodrigo Gómez. (2017). Grupo Televisa..., cit.

[154] Rodrigo Gómez. (2004). TV Azteca y la industria televisiva mexicana..., cit.

Imagen Televisión

Imagen Televisión began operations in October 2016 as the third largest player on the Mexican television market, thus ending the duopoly of Televisa and TV Azteca. Its television grid replicates formulas tested by its competitors, so it focuses on telenovelas, news, sports and entertainment. Unlike its competitors, it produces less fiction and stands out for broadcasting Turkish telenovelas. It belongs to Grupo Ángeles, controlled by entrepreneur Olegario Vázquez Raña, who owns businesses in various industries including hospital services (Hospitales Ángeles), banking (Banca Multiva), and hotels (Camino Real, Real Inn, and Quinta Real). Today, Grupo Imagen is a media conglomerate that operates radio, television, and print media (the newspaper Excélsior) outlets.

Multimedios

Multimedios is a media company in Mexico with a presence primarily in the northeastern region of the country. Founded in 1968, Multimedios has grown to become a diversified media conglomerate^[155]. Its operations are focused on television, radio, print, and digital platforms. On the television side, Multimedios operates regional free-to-air (Canal 6 and Milenio TV) and cable channels, offering programming that includes entertainment, news, and sports. Its regional reach has allowed it to connect more closely with local audiences, helping it consolidate its position as a major player on the media scene, mainly in the state of Nuevo León and its capital Monterrey. Internationally, it operates a channel in Costa Rica (Canal 8).

Telsusa (Channel 13)

The broadcaster Telsusa belongs to the Albavisión group of Mexican-Guatemalan businessman Ángel González, known as “El fantasma” (meaning “the ghost” in English). Telsusa started to operate in 2017, following the tender for broadcast licenses organized by IFT, when it was granted licenses for 12 terrestrial stations to operate in 12 cities in southeast Mexico. The group currently operates 14 TV stations and broadcasts a generalist television program under the Canal 13 brand. Through infrastructure and multiprogramming agreements with Octava and Heraldo TV, it also covers Mexico City. With this broadcaster, González actively entered the television market in Mexico, adding another media asset to his businesses in Latin America. The Albavisión group currently owns media in Argentina, Bolivia, Chile, Costa Rica, Ecuador, El Salvador, Guatemala, Nicaragua, Paraguay, Peru, and the Dominican Republic^[156].

[155] The group’s historical investments include radio station XEAM, until 1968 when it began to incorporate other means of communication.

[156] Gabriel Sosa. (2017). *El Fantasma...*, cit.

Heraldo Television

A recently created media conglomerate, Heraldó Television belongs to the Andrade Group, which specializes in car dealerships. In 2017, the company relaunched the newspaper El Heraldó, and since 2019 it has been buying radio stations in several cities, building a radio chain under the name Heraldó Radio. As of February 2020, thanks to multiprogramming, it leased the signal of channel 28 from Imagen Televisión and, later, one of the channels of La Octava to broadcast its news channel, Heraldó Televisión. In 2023, it purchased the license rights from Grupo Radio Centro (La Octava), becoming the license owner of channel XHFAMX-TDT in Mexico City, with coverage in four different Mexican states.

Once TV

Once TV Mexico is the oldest educational television network in the country and is operated by the National Polytechnic Institute. Founded in 1959, it is based in Mexico City and its programming is oriented towards education, culture, and entertainment. Once TV has stood out for its educational approach, offering programs that promote knowledge and culture to its audiences. It produces a variety of original programs covering topics such as science, politics, art, music, sports, and news. Throughout its history it has won international awards for its children's programs. It currently broadcasts two programs thanks to multiprogramming and, in recent years, thanks to infrastructure sharing with SPR's Channel 14, it covers 70% of the national territory.

Channel 22

Televisión Metropolitana (Canal 22) began operations in 1982. Its budget and operation depend on the Ministry of Culture. It is a public television channel focused on the dissemination of culture and education. Its programming includes music, dance, sports, literature, theater, Mexican cinema, international art cinema, and cultural documentaries, standing out for its educational approach and commitment to the preservation of cultural heritage. Canal 22 produces original content ranging from documentaries to analytical programs, and uses digital platforms to reach wider audiences. Through multiprogramming and SPR's infrastructure, it reaches 56% of the national territory.

SPR

SPR Canal 14 is a new player in the public media universe in Mexico. It was created in 2014 through the Law of the Public Broadcasting System of the Mexican State. It stands out for its institutional design, as it is the first decentralized public media with a legal personality and its own assets. SPR Canal 14 offers programming that includes music, performing arts, news, documentaries, and educational programs. The broadcaster uses and promotes digital platforms to expand its reach. It also promotes access to quality content from all other public media. In fact, through its infrastructure and multiprogramming, it carries the programs of Once TV, Canal 22, TV UNAM, and Ingenio TV. SPR Canal 14 seeks to become the public channel of reference, exploiting its advantages - the largest broadcast infrastructure in the country, coverage (72% of the national territory), and public budget. It also runs an OTT (over-the-top) platform called MxPlay, through which it offers access to live broadcasting through SPR channels, as well as other public channels such as Once TV and Capital 21.



Radio

The radio market in Mexico is structured on three levels: commercial radio, public radio, and community radio (including social community and indigenous radio). As with most of the countries of the region, commercial radio is the one that concentrates the largest percentage of frequencies. Nevertheless, in recent years, public and community radio have seen an increase in their shares on the license market. The right to grant licenses to social community and indigenous radio stations was finally recognized following the 2013 constitutional reform of telecommunications and the enforcement of the 2014 Federal Telecommunications and Broadcasting Law[157]. This situation should be highlighted as a significant advance, since until then there was no legal framework for these radio stations, which limited the plurality of voices and blocked the democratization of media and communication in Mexico. However, more initiatives are still needed to promote indigenous radio stations in achieving sustainability. Above all, native peoples should have access and visibility in the Mexican public eye, especially through non-indigenous media[158].

According to the IFT, a total of 2,044 radio stations were operational on the AM and FM bands in Mexico in 2022. Commercial radio (65% of frequencies) has a market share three times larger than public radio (17%) and ten times larger than community and indigenous radio (6%), despite the fact that Mexico has 68 indigenous peoples, and that two out of every ten Mexicans consider themselves indigenous. Mexico transitioned from the AM to FM radio band as a result of a frequency change policy adopted in 2010.

In terms of ownership, there is also a high level of concentration on the Mexican radio market, but not as high as in television. According to a new study on the shareholding structure of radio frequency holders, conducted by Francisco Vidal Bonifaz, around one-third of all commercial radio stations in Mexico are owned by five groups or families: Radiorama (14%), Grupo ACIR (4.5%), Multimedios (3.1%), Grupo Fórmula (3.1%), Grupo Radio Centro (2.7%), and MVS Radio (2.6%)[159].

[157] Rodrigo Gómez. (2018). The Mexican third sector..., cit.

[158] Clara Luz Alvarez. (2023). Personas indígenas en la televisión: su no discriminación y el derecho a la información de la sociedad. *Estudios en derecho a la información*, (16), 3-34.

[159] Francisco Vidal Bonifaz. (2021). El estado de la concentración de la propiedad en la radio comercial abierta en México, in *Revista Latinoamericana de Ciencias de la Comunicación*, Número 36, pp. 88-90.

In 2019, Grupo Televisa decided to sell 50% of the shares in Sistema Radiópolis, a company that operates 18 AM/FM radio stations, with coverage in 22 Mexican states, including the historical W station, today known as W Radio. The other 50% of the shares have been controlled by the Spanish group Prisa since 2002, which is the only foreign group that currently operates on the radio broadcasting market in Mexico. With the exit of Grupo Televisa, the new investors and the Spanish group experienced tension triggered by their desire to control content and financial operations. These disputes ended up in court. In April 2022, the three Mexican investors in the company (Crédito Real, Corporativo Corral, and Barrister Services) and the Prisa group reached an agreement regarding the assigning of board members and the management of the company[160].

Most of the five companies that dominate the radio broadcasting sector are part of conglomerates that operate television channels (such as Multimedios, MVS, and Grupo Fórmula) or newspapers and magazines (Multimedios). Another characteristic of the Mexican commercial radio sector is the fragmentation of ownership. One fifth of the largest radio stations are shared among owners who control only one or two stations.

In the case of public radio, licenses are awarded to various federal and state government agencies, universities, and public and private technological institutes. At the federal level, IMER operates 17 terrestrial radio stations in the country, and the National Institute of Indigenous Peoples (*Instituto Nacional de los Pueblos Indígenas*, INPI) has 37 radio licenses, with only 22 currently being in use. At a state level, the governments of Oaxaca and Sonora stand out for the high number of granted licenses (33 and 30, respectively). Regarding the licenses for social community use (which are not community or indigenous), the number has increased significantly in recent years to 253, yet many of them are far from achieving educational or cultural diversity related objectives. Dozens of these stations are operated by institutions and organizations that represent the interests of the same commercial radio groups, local politicians, and churches.

[160] Nicolas Lucas. IFT ratifica la nueva configuración accionaria de Radiópolis; Prisa se queda con el 50% de la empresa. 8 November 2022. *El Economista*. <https://dplnews.com/mexico-ift-ratifica-la-nueva-configuracion-accionaria-de-radiopolis-prisa-se-queda-con-el-50-de-la-empresa/>.

In terms of radio penetration, according to IFT data, some 48.5% of Mexican households own radio sets. Nevertheless, 20% of all citizens use their mobile phone (through applications and internet sites) to listen to radio. In the country’s three main cities (Mexico City, Guadalajara, and Monterrey), 8.8% of consumers listen to the radio for more than six hours, Monday to Sunday. During various time slots, such as from 9 a.m. to 10 a.m., the radio listenership reached 14.87% (July 2021 to June 2022)[161]. According to the IFT’s National Survey of Audiovisual Consumption 2022, some 38% of Mexicans listen to the radio for an average of 3.1 hours a day. Music programs have the highest audience rate, with 82% of listeners, followed by news programs with 41%[162].

Radio market in Mexico, 2023

Type of radio	Broadcasters	Share of total, %
Commercial	1,365	65%
Public	347	16%
Community	267	12%
Social Community	141	6%
Indigenous	27	1%
TOTAL	2,109	100%

Source: Authors’ own compilation based on data from Registro Público de Concesiones del IFT. Infraestructura de estaciones de radio AM y FM • Created with Datawrapper

[161] IFT. (2022). Anuario Estadístico 2022. <http://bit.ift.org.mx>.
 [162] IFT. (2022). Encuesta Nacional de Consumos Audiovisuales 2022. <https://somasaudiencias.ift.org.mx/sub-secciones/2>.

Main radio groups

Radiatorama

Radiatorama is the largest radio group in Mexico with 181 radio stations distributed throughout the country, including Mexico City. Radiorama was founded in 1970 and over the years it has increased the number of its radio stations. The broadcaster was co-founded by Javier Pérez de Anda and Adrián Pereda López, who previously collaborated with Organización Radio Centro (Grupo Radio Centro). Radiorama is a family-owned company[163]. According to researcher Fátima Fernández, former public officials control some of the first licenses awarded to the group[164].

ACIR Group

The company is owned by the Ibarra family and was founded in 1963 by Francisco Ibarra López, previously a director of the Núcleo Radio Mil group. Like most radio groups, it has expanded over the years. It currently operates 57 radio stations in 25 cities. Its main source of income comes from its six radio stations located in Mexico City. In 1997, the U.S. company Clear Channel acquired 40% of the company's shares, in compliance with the Federal Law of Radio and Television (later replaced by the Federal Law of Telecommunications and Broadcasting), which limited foreign investment in the sector. The alliance with the U.S.-based group ended in 2007 when Grupo ACIR re-acquired the previously sold shares[165]. Mexican businessman Carlos Slim was a shareholder of Grupo ACIR for several years. Between 2014 and 2019, the broadcaster had an agreement with The Walt Disney Company for the use of the Radio Disney brand on several of its radio stations. In 2018, ACIR Group, in association with the U.S.-based broadcaster iHeartMedia, launched the iHeartRadio network in Mexico[166].

[163] Nicolas Lucas. Radiorama y Grupo ACIR salvan su concentración en la CDMX, Chihuahua y Michoacán. 1 June 2020. El Economista. <https://www.eleconomista.com.mx/empresas/Radiatorama-y-Grupo-ACIR-salvan-su-concentracion-en-la-CDMX-Chihuahua-y-Michoacan-20200601-0053.html>.

[164] Fátima Fernández Christlieb. (1991). La radio mexicana, centro y regiones, México, Ed. Juan Pablos, p. 147.

[165] Gabriel Sosa. ACIR se divorcia de Clear Channel. 2 October 2007. El Universal. <https://archivo.eluniversal.com.mx/columnas/67602.html>.

[166] Gabriel Sosa. Grupos, cadenas y alianzas estratégicas en la radio. August 1996. Revista Mexicana de Comunicación. <https://gabrielsosaplata.com/2014/11/13/grupos-cadenas-y-alianzas-estrategicas-en-la-radio-agosto-1996/>.

Multimedios Radio

Multimedios Radio is a division of Multimedios Group, one of the most important media conglomerates in Mexico, which also publishes newspapers such as Milenio and La Afición and broadcasts television channels in various cities in the country (including Mexico City). It also operates outdoor advertising and graphic production companies such as Pol y Multigráfica, owns sports brands such as Mediotiempo.com and Séptima Entrada, and publishing houses such as Ríos de Tinta[167]. The broadcaster was founded by Francisco Dionisio González, who launched the radio station XEAW-AM in Monterrey back in 1933. It has remained a family business ever since. Multimedios Radio has 40 broadcast licenses, but it does not cover Mexico City[168].

Formula Group

The company was founded in 1968 by Rogerio Azcárraga Madero, nephew of the founder of XEW and later Televisa, Emilio Azcárraga Vidaurreta. The group's founder died on 12 April 2022. Radio was the core business of Formula Group, but it has also been linked to the music industry and other activities unrelated to communications. The network was formed by several radio stations that were part of Emilio Azcárraga Vidaurreta's Radiópolis network, based in Mexico City, and has been expanding its presence locally and nationally with new licenses, acquisitions, and commercial agreements with other radio groups. The company operates five radio stations in Mexico City and has several national radio chains, as the owner of 39 radio stations and having franchised others. It currently broadcasts its news and entertainment programs on pay channels under the name Telefórmula.

Grupo Radio Centro (GRC)

Grupo Radio Centro owns 34 radio stations in Mexico's main cities and has its headquarters in Mexico City. The company was founded by Francisco Aguirre Jiménez in 1946 as Cadena Radio Continental. Six years later, it was renamed to Organización Radio Centro. In 1965, a new entity was set up under the name Organización Impulsora de Radio (OIR) to commercially represent affiliated radio stations[169]. Cadena Radio Centro (CRC) was founded in 1983 with the aim of attracting Hispanic audiences in the United States.

[167] Multimedios Radio. (2024). <https://www.mmradio.com/>.

[168] Nicolas Lucas. Multimedios vende sus activos de radio y televisión en Monclova. 13 April 2023.El Economista. Multimedios vende sus activos de radio y televisión en Monclova (eleconomista.com.mx).

[169] Gabriel Sosa. (1996). ACIR se divorcia..., cit.

In 1994, the company sold CRC and acquired shares in the U.S.-based company Heftel Broadcasting. In 1995, Grupo Radio Centro decided to sell the Heftel shares and invest in Radiodifusión Red, in order to increase its presence in Mexico City. GRC is the only radio company listed on the stock market since 1993. Francisco Aguirre was the license owner of television channel 13 between 1968 and 1972, until the federal government bought the license from him[170]. Many years later, his son, Francisco Aguirre Gómez, sought to venture into television again. He succeeded in 2015 when he won the tender for a nationwide broadcast network license, but was unable to pay the amount that had to be paid to the authority. Again, in 2017, he participated in a tender and won the license for a television channel in Mexico City: La Octava TV. However, due once again to financial problems, he was forced to sell the television channel to El Heraldo Media Group in June 2022.

MVS Radio

MVS Radio is part of a conglomerate called MVS Comunicaciones, which operates pay television channels, the Dish satellite television network in Mexico, a publishing house, and an advertising company. MVS was founded in 1967 by Joaquín Vargas Gómez (1925-2009), a businessman who continually attempted to break Televisa's monopoly on the television market with companies such as MVS Multivisión, a pioneer in microwave television, and DirecTV, a satellite television which ceased operating in Mexico in 2004. The Vargas family owns other businesses, including Corporación Mexicana de Restaurantes (CMR). In radio, it is the license owner of 33 frequencies in the country, where it runs radio channels that reproduce broadcast concepts tried elsewhere, such as Exa FM, La Mejor, FM Globo and others, which in turn are rebroadcast on affiliated stations in Mexico. They are also broadcast in countries such as Argentina, Costa Rica, Ecuador, El Salvador, Honduras, the Dominican Republic, and the United States[171].

IMER

Mexican Radio Institute (IMER) is an entity of the Mexican State founded in 1983 and comprising 17 radio stations, which operate in the central region of the country, as well as in the northern and southern borders and the Yucatan Peninsula. These radio stations reach 10 locations in eight states (Chiapas, Yucatán, Michoacán, Michoacán, Oaxaca, Baja California, Chihuahua, Coahuila, and Sonora, in addition to Mexico City and the metropolitan area). Due to the power of its radio signal, IMER's programming can actually be listened to in 17 Mexican states. In 2020, IMER became a decentralized organization, which allows it to gain greater autonomy[172].

[170] Gabriel Sosa. (2021). Días de radio. Los 100 años de la radio en México. México, Ed. Tintable, p. 63.

[171] Gabriel Sosa. Dish rompe un monopolio. April 2009. Revista Mexicana de Comunicación on line. <http://www.mexicanadecomunicacion.com.mx/Tables/rmxc/sosa.htm>.

[172] IMER. (2024). Qué es el IMER. <https://www.imer.mx/que-es-el-imer/>.

Radio Educación

Radio Educación was established in November 1924. It is considered the first “cultural” radio station in Mexico, created at the initiative of the then Secretary of Public Education, José Vasconcelos. It is currently a decentralized entity of the Ministry of Culture. It operates four radio stations – two in Mexico City, one in Mérida (Yucatán), and another in Hermosillo (Sonora). It also has a broadcast license for a frequency in Morelia (Michoacán). Radio Educación owns the only shortwave radio station in Mexico. It is the largest producer of cultural and educational radio content in the country: around 25,000 productions or live broadcasts of Radio Educación are rebroadcast annually by dozens of public radio stations. Its newscasts, called Pulso, are rebroadcast on more than 20 stations nationwide, and on more than 20 Radio Bilingüe affiliated stations in the United States^[173].



[173] General Directorate of Radio Education. (2021). Informes Trimestrales. <https://radioeducacion.edu.mx/informes-trimestrales-2019-2021>.

Newspapers

Print media have an important place in Mexico’s journalistic history. Their origins date back to the first decade of the 19th century, when *El Despertador Americano* was launched in 1810, during the War of Independence. Throughout that century, a myriad of newspapers were published in an era of partisan and religious press, which was not yet structured by the emergence of journalism as a profession.

One hundred years after the appearance of *El Despertador Americano*, the first newspapers produced at industrial scale began to be printed, some of which are still in circulation. These still have significant influence in the country’s public sphere, with notable publications including *El Universal* (1916) and *Excélsior* (1917), published in Mexico City, *El Informador* (1917) based in Jalisco, *El Siglo de Torreón* (1922) printed in Coahuila, *El Diario de Yucatán* (1925) serving the eponymous state in Mexico’s southern area, *El Imparcial* (1937) operating in Sonora, and *El Norte* (1938) distributed in Nuevo León.

Throughout the 20th century, hundreds of publications appeared in the 32 states of Mexico. These newspapers were developed under an industrialized journalistic model with unequal advances in their professionalization[174]. For example, Organización Editorial Mexicana (OEM) was founded in 1976 and became one of the most important press publishers in the country, with newspapers in most cities and other urban centers. It currently has 46 newspapers in circulation[175]. In the 1980s, some new editorial projects emerged, including *El Financiero* (1981) and *El Economista* (1988), two newspapers dedicated to economic reporting, as well as *La Jornada* (1984), a generalist newspaper produced in the country’s capital.

[174] Rubén Arnoldo González Macías & Martín Echeverría. (2018). A medio camino. El sistema mediático mexicano y su irregular proceso de modernización. *Revista mexicana de opinión pública*, núm. 24: 35–51; Juan Larrosa-Fuentes. (2014). Transformaciones en la economía política de las empresas periodísticas: periódicos artesanales, industriales y post-industriales. *Retos y oportunidades del periodismo digital*, ed. Rosalía Orozco Murillo. Guadalajara: Universidad de Guadalajara, 71–86.
<http://biblioteca.udgvirtual.udg.mx/eureka/pudgvirtual/PeriodismoDigital.pdf>

[175] OEM. (2023). Organización Editorial Mexicana <https://www.oem.com.mx/>

The 1990s and the first decade of the 21st century brought the emergence of the first two press conglomerates from the state of Nuevo León. The first to be founded was Grupo Reforma. In 1993, the owners of the newspaper El Norte decided to launch the newspaper Reforma in Mexico City, and in 1998, they launched Mural in Guadalajara. Something similar happened with Grupo Multimedios, a press group from Nuevo León, which started operating El Diario de Monterrey in 1967. In the late 1990s, the company began to publish newspapers in Mexico City, as well as in the states of Mexico, Jalisco, Coahuila, Guanajuato, Hidalgo, Puebla, and Colima. These are some of the most important and relevant newspapers in the country. However, there are currently more than 450 print media titles circulating in Mexico[176], according to data from the National Register of Print Media (Padrón Nacional de Medios Impresos, PNMI)[177] and the National Directory of News Media (Directorio Nacional de Medios Informativos, DNMI), curated by experts in journalism and communication[178].

[176] Historically, Mexico has had a deficient system for generating information related to its media industries. Newspapers, in this case, have a duty to report certain information to the Ministry of the Interior so that it can prepare the National Register of Printed Media. However, there is no monitoring or auditing system of the information reported by the newspapers. On the other hand, no newspaper in the country is listed on the stock exchange; therefore, newspaper publishers do not have any legal obligation to publicly report their economic performance.

[177] Secretaría de Gobernación. (2023). Padrón Nacional de Medios Impresos. <https://pnmi.segob.gob.mx/reporte>

[178] Rubén Arnoldo González Macías et al. (2023). Panorama de los medios informativos, ...cit.

Number of printed media outlets by state, 2022

PNMI: National Register of Print Media (Padrón Nacional de Medios Impresos) DNMI: National Directory of News Media (Directorio Nacional de Medios Informativos)

	PNMI	DNMI
State	Number of newspapers	Number of newspapers
Aguascalientes	4	9
Baja California	14	12
Baja California Sur	3	6
Campeche	6	11
Chiapas	11	13
Chihuahua	8	6
Ciudad de México	157	63
Coahuila	14	20
Colima	4	5
Durango	3	8
Estado de México	33	38
Guanajuato	19	22
Guerrero	4	15
Hidalgo	9	13
Jalisco	11	10
Michoacán	5	4
Morelos	11	8
Nayarit	3	4
Nuevo León	8	12
Oaxaca	8	11
Puebla	12	21
Querétaro	17	13
Quintana Roo	12	17
San Luis Potosí	4	19
Sinaloa	13	6
Sonora	8	12
Tabasco	12	13
Tamaulipas	18	18
Tlaxcala	1	3
Veracruz	33	30
Yucatán	10	12
Zacatecas	5	5
Total	480	459

Source: Authors' own compilation based on data from PNMI and DNMI • Created with Datawrapper

Although there is a difference of 21 publications between the two databases, the two sources of information about print media in Mexico offer a good picture of the size of the industry. According to both sources, it's evident that there is a high concentration of print publications in the country's capital city. Yet, there is considerable variation between the two sources: the Ministry of the Interior's database shows that there are 157 publications in Mexico City, equivalent to 32.7% of the total, while the independent study reports 63 print media, equivalent to 13.7%. On the other hand, both databases show the states of Mexico, Veracruz, and Guanajuato as having an abundance of printed press, while states such as Nayarit and Tlaxcala have just a few publications.

A feature that has historically characterized Mexican newspapers is their low circulation and readership levels[179]. The largest circulation reported by a newspaper in Mexico is that of the daily *Reforma*, available in the capital city, with 174,000 copies printed per day. This number is low, especially for Mexico City, whose metropolitan area is inhabited by more than 19 million people.

Although it may seem counterintuitive, low circulation does not indicate the irrelevance of the print media. On the contrary, these newspapers have significant influence, because their readers are political and social elites such as public servants, journalists, businessmen, academics, intellectuals, and social leaders. The contents of most newspapers are not aimed at mass audiences, although there are certainly popular and widely distributed publications. On the other hand, the digital versions of many of these newspapers are ranked highest in terms of reputation and consumption.

[179] Claudia I. García Rubio. (2013). Radiografía de la prensa diaria en México en 2010. *Comunicación y sociedad*, núm. 20 65–93; Enrique Sánchez Ruíz. (1994). El público de la prensa: la insostenible levedad de casi no ser. *Anuario de Investigación de la Comunicación CONEICC*, núm. 1. <http://ojs.coneicc.org.mx/index.php/anuario/article/view/34>

Average daily printed copies of newspapers, Mexico City, 2022

Note: Print circulation, as a metric, has been criticized because it indicates how many copies are printed, but it is not known how many are put into circulation or, more importantly, how many people read each copy.

Newspaper	Print run
Reforma	174,209
El Universal	122,905
Excelsior	111,321
La Jornada	103,246
Milenio Diario	99,827
El Financiero	91,89
El Sol de México	64,111
El Economista	41,771

Source: Authors' own compilation based on data from PNMI • Created with Datawrapper

The low circulation and elitist readership specific to the Mexican print press leads to a third feature of the print media sector, which shows the close relationship of this industry with political spheres. Mexican newspapers in circulation before the 1980s were created under a semi-authoritarian political regime in which the boundaries between the press and political power were blurred. During that period, which lasted more than seven decades, it was common for journalists to be paid directly by government agencies, or to receive extra payments for political favors such as not publishing certain information. Publishers also benefited from tax exemptions and economic aid through the purchase and sale of state advertising[180].

Starting in the 1980s, new newspapers gradually emerged, seeking a different relationship with the government and political actors, increased journalistic professionalism, and financing through the sale of private advertising which would lead to greater editorial independence[181]. However, some of the features of the older press still survive.

[180] Sallie Hughes. (2006). Newsrooms in Conflict. United States: University of Pittsburgh Press, 2006; Chappell Lawson. (2002). Building the Fourth Estate: Democratization and the Rise of a Free Press in Mexico. California: University of California; Williams A. Orme, ed., (1996). A Culture of Collusion: An Inside Look at the Mexican Press. Florida: University of Miami: North South Center Press.
 [181] Sallie Hughes.(2006). Newsrooms in Conflict..., cit.; Chappell Lawson. (2002). Building the Fourth Estate..., cit.; Juan Larrosa-Fuentes. (2018). Los periódicos de Guadalajara entre 1991 y 2011: el ocaso de la prensa industrial. In Estudios sobre periodismo en México: despegue e institucionalización, ed. María Elena Hernández Ramírez. Guadalajara: Universidad de Guadalajara. 189–244.

In the Mexican public debate there is an unofficial typology for newspapers, which classifies these media depending on their range of reach and influence. In the first category, there are the newspapers in nationwide circulation, media with high influence in the debates affecting the federal government and which, in theory, are read throughout the country. The second category comprises newspapers with state coverage whose influence is limited to the state in which they are published. Finally, there is the local press, which generally has the audience concentrated within a city or municipality. The most important Mexican newspapers at the nationwide and state levels are featured below.

Newspapers that report nationally relevant information

The “national circulation newspapers” have three features in common. The first is that they are produced and edited in the country’s capital, Mexico City. The second is that their content tends to be focused on reporting news, facts, and events that take place at the national level. For example, their sources are the Presidency of the Republic, the Congress of the Union, and the Supreme Court of Justice of the Nation. The third is that they are read by political and social elites from different parts of the country, as a way to learn about national events.

However, in Mexico, there are no newspapers with nationwide circulation in the literal and strict sense. None of the newspapers that are classified under this label circulate throughout the entire national territory. Most of their circulation takes place in Mexico City, and printed copies are sent daily to some of the most important regional capitals. On the other hand, they are not nationwide newspapers in terms of content. Although they do generate information from different states, covering state affairs is not the focus of their attention. Finally, they do not have a massive nationwide readership for two primary reasons. The first is that, as mentioned above, these newspapers are mostly read in the capital. The second reason is that the number of the printed copies of these newspapers is too low to circulate in a country with more than 125 million inhabitants. For this reason, we consider that the name “newspapers that report nationally relevant information” is more appropriate.

Brief profiles of eight newspapers that report nationally relevant information will be presented in this report. These newspapers were chosen for their history on the market, their prestige and influence, as well as their circulation levels. The newspapers are presented according to their age[182].

El Universal

This is one of the oldest newspapers in the country. It was first published on 31 October 1916 in Mexico City. Juan Francisco Ealy Ortiz has been the owner of the newspaper (and also its president and director) since 1969. According to the PNMI, El Universal has an average daily circulation of 122,000 copies. The web portal of El Universal is among the largest in the country by audience.

Excélsior

Founded by Rafael Alducín in Mexico City, Excélsior published its first edition on 18 March 1917, four months after the launch of El Universal. The publisher has changed ownership several times throughout its history. It is currently called GIM Compañía Editorial S.A. de C.V. The owner and president of Excélsior is Olegario Vázquez Raña, a prominent businessman who also owns media outlets in the broadcasting sector (Grupo Imagen), as well as other ventures outside the media industry. Excélsior currently reports an average daily circulation of over 111,3000 copies. Its content can be read on its [web portal](#) as well.

El Sol de México

This newspaper is published by Compañía Periodística del Sol de México, S.A. de C.V. and belongs to Organización Editorial Mexicana (OEM). Mario Vázquez Raña, who has now passed away, was the founder of the newspaper, and of OEM as an enterprise. El Sol de México was first published on 25 October 1965 in Mexico City. Paquita Ramos Vázquez, Vázquez Raña's widow, is currently the publisher's president and general manager. According to the PNMI, the newspaper has an average daily circulation of some 64,000 copies.

[182] The information used to draft the profiles in this section comes from the newspapers' websites as well as from the Ministry of the Interior's PNMI.

El Financiero

This is a finance and business oriented newspaper that was first published on 15 October 1981 in Mexico City. El Financiero is currently edited by Grupo Editorial Lauman and its director is Enrique Quintana López. In 2013, the Mexican newspaper signed a partnership agreement with Bloomberg news agency and launched a joint venture Spanish-language business news service. El Financiero has an average daily circulation of nearly 92,000 copies.

La Jornada

The newspaper La Jornada was first published on 19 September 1984 in Mexico City. Publisher Demos, Desarrollo de Medios, S.A. de C.V. was one of the first to decide to print the publication in tabloid form, leaving behind the broadsheet format of the more traditional newspapers. La Jornada was a journalistic initiative which, from its early days, openly declared a leftist editorial line. The newspaper reports an average daily circulation of 103,000 copies, and distributes its content through its [web page](#) as well. The current director of La Jornada is Carmen Lira Saade.

El Economista

This newspaper El Economista was first published on 5 December 1988 in Mexico City. Together with El Financiero, El Economista has established itself as one of the most relevant publications in the field of economic and financial journalism, while also competing with the generalist newspapers in Mexico. The publisher, Grupo Editorial, S.A. de C.V., currently has Jorge Nacer Gobera as its president and Francisco Ayza as its general manager. This newspaper is printed Monday through Friday with an average of 41,700 copies daily, and its content is also available on its [website](#).

Reforma

This newspaper has been printed in Mexico City since 20 November 1993. Reforma is part of a consortium called Grupo Reforma, owned by the Monterrey-based Junco de la Vega family. Currently, the editor of Reforma is Juan Pardinás, and the newspaper has a circulation in excess of 174,000 copies per day. Reforma, as well as the group in general, has traditionally had a center-right editorial line with an affinity towards the business class^[183]. Reforma's [portal](#) is also one of the most visited news websites in Mexico.

[183] Cintia Smith Pussetto, Nancy Janett García Vázquez, & Jesús David Pérez Esparza. (2008). Análisis de la ideología empresarial regiomontana. Un acercamiento a partir del periódico El Norte, CONfines de Relaciones Internacionales y Ciencia Política 4, núm. 7. 11-25.

Milenio Diario

This newspaper was launched on 1 January 2000, in Mexico City. This journalistic project was part of an expansion process of Grupo Multimedios, a Monterrey-based company. Currently, the publisher's president is Francisco D. González. Milenio Diario has an average daily circulation nearing 100,000 copies, and also publishes news on its [website](#).

Newspapers reporting state relevant information

The second group of newspapers in our classification are those dedicated to generating information on what is happening in a particular state. Similar to how their peers operate on a nationwide level, state newspapers tend to concentrate their work on what the state government is doing and on events that take place in the state capital. They rarely have the capacity to generate news on what is happening in all the municipalities and cities that make up the state. Likewise, their circulation and readership tends to be limited to urban centers.

In the last twenty years, an important process of centralization of these newspapers has developed, leading to a concentration of information. This process has affected the ownership of newspapers, the journalistic workforce, and the editorial content printed by these publications[184]. In terms of ownership, two business groups have expanded in different states through the purchase of local newspapers. Grupo Reforma and Grupo Milenio have bought newspapers in different state capitals between 2000 and 2020. OEM, on the other hand, has had newspapers circulating in all the states for decades.

The change in media ownership has had two negative effects. The first is that the number of journalists working for local newspapers has been reduced, as the newspaper groups, through digital technologies, have the power to create deterritorialized newsrooms that operate in different cities in real time.

[184] Juan Larrosa-Fuentes. (2018). Analyzing Spatialization in Newspapers' Production: A Case Study of Guadalajara's Daily Press. *International Journal of Communication* 12: 3473-89.

For example, in local newspapers, the positions of journalists and editors dedicated to national or international information have tended to disappear, as this information is generated in Mexico City and then published by all the newspapers in the group. The second effect is the phenomenon of “editorialization”^[185] that occurred in many of these newspapers, a situation where state media, lacking the capacity to produce sufficient local content, tend to give more space to nationally relevant information. As a result, these state-focused newspapers tend to publish less locally relevant news content.

Below, we offer brief profiles of three press groups that run state-focused newspapers throughout Mexico, as well as local newspapers with a long history.

Organización Editorial Mexicana

Known as OEM, Organización Editorial Mexicana is one of the oldest press groups in Mexico. OEM was set up in 1976, when Mario Vázquez Raña took over several newspapers printed in many of the country’s state capitals. From there, Vázquez Raña, who died in 2015 and left OEM in the hands of his family, built a press conglomerate with dozens of newspapers, which led some observers to consider him the Mexican “Citizen Kane”^[186]. OEM’s newspapers have historically been considered “officialist” because, in general, they have been uncritical of the respective governments in power. Currently, according to its web page, OEM has a portfolio of 46 newspapers and 43 news portals. Although they do not have newspapers in all of Mexico’s states, OEM is the press group that owns the highest number of newspapers in Mexico. Most of the state newspapers they own are titled El Sol, followed by the name of the state or city where they circulate, for example: El Sol de Hermosillo, El Sol de Durango, El Sol de Sinaloa, El Sol de Toluca, El Sol del Centro, among many others.

Grupo Reforma

This group was born in Monterrey, the capital of Nuevo León, one of the northern states in Mexico. Historically, this state has concentrated wealth and business capital, and it is no exception in the media sector. The history of Grupo Reforma began in 1922 when the Junco de la Vega family started publishing the newspaper El Sol. Later, in 1938, they founded El Norte, a newspaper that is still in circulation in Monterrey and has an important influence in the local public sphere.

[185] Antonia González-Borjas. (2000). El fenómeno de la ‘edición local’ y la prensa local. *Ámbitos*, núm. 4. 87–100.

[186] Juan Larrosa-Fuentes. Mario Vázquez Raña, ¿el Ciudadano Kane mexicano? 22 February 2015. Sistema Autorreferencial. <https://autorreferencial.wordpress.com/2015/02/22/mario-vazquez-rana-el-ciudadano-kane-mexicano/>

In addition to El Norte in Monterrey and Reforma in Mexico City, the group owns the Mural newspaper in Guadalajara[187]. These three publications form, in terms of journalistic and purchasing markets, the “golden triangle”, as these three urban centers are home to three quarters of the population with the highest purchasing power in Mexico[188]. Grupo Reforma’s newspapers have always had a center-right editorial line and an affinity with the business class[189].

Grupo Milenio

Founded by Jesús Dionisio González González, Grupo Milenio began publishing newspapers in Nuevo León during the 1970s. The first newspaper was El Diario de Monterrey, which today is named Milenio Monterrey. In 2000, the group expanded to Mexico City and launched Milenio Diario[190]. Since then, the group has launched the following state newspapers: Milenio Monterrey, managed by Luis Salazar; Milenio Jalisco, managed by Manuel Baeza Sánchez; Milenio Laguna, managed by Marcela Moreno; Milenio Estado de México, managed by Sergio Villafuerte; Milenio León, managed by Miguel Angel Puértolas; Milenio Hidalgo, managed by Eduardo González; Milenio Puebla, managed by Pablo Ruiz; and Milenio Tamaulipas, managed by Pedro Elizalde. All these newspapers generate news in their localities and publish it both in print and digital format. Grupo Milenio is part of Grupo Multimedios, a conglomerate of press, radio, television, and non-media companies[86].

El Informador

One of the oldest newspapers in Mexico, El Informador was founded in 1917 in Guadalajara, the capital of the state of Jalisco. The publisher is a family-owned business that has been managed by the Álvarez del Castillo family since its inception. Unión Editorialista S.A de C.V. is currently controlled by Carlos Álvarez del Castillo Gregory, who is the grandson of the newspaper’s founder. In general, El Informador has been considered to be a pro-government publication[192]. It has an average daily circulation of nearly 43,500 copies and also publishes its own digital portal, which is among the news websites with the highest traffic in the country.

[187] Juan Larrosa-Fuentes. (2018). Los periódicos...cit.; María Elena Hernández Ramírez. (2010). Franquicias periodísticas y sinergias productivas en la prensa mexicana: en busca de nuevos modelos de financiamiento. Estudios sobre periodismo: marcos de interpretación para el contexto mexicano, ed. María Elena Hernández Ramírez. Guadalajara: Universidad de Guadalajara. 55-121; Eric Sandoval de la Torre. (2022). La historia de Mural y los 100 años de Grupo Reforma. En Medios de comunicación y derecho a la información en Jalisco, editado por Juan S. Larrosa-Fuentes, 63-77. Guadalajara, México: ITESO. <https://rei.iteso.mx/handle/11117/10381>.

[188] Juan Larrosa-Fuentes. (2018). Analyzing spatialization...cit

[189] Smith Pussetto, García Vázquez & Pérez Esparza. (2008). Análisis de la ideología...cit.

[190] Juan Larrosa-Fuentes. (2018). Los periódicos...cit.; María Elena Hernández Ramírez. (2010). Franquicias periodísticas...cit.

[191] María Elena Hernández Ramírez. (2010). Franquicias periodísticas...cit.

[192] Juan Larrosa-Fuentes. (2018). Los periódicos... cit; María Elena Hernández-Ramírez. (2017). El Informador, cien años después. Medios de comunicación y derecho a la información. Jalisco, ed. Graciela Bernal Loaiza. Guadalajara, México: ITESO, Departamento de Estudios Socioculturales. 221-40.

El Siglo de Torreón

El Siglo de Torreón was founded in 1922 in Torreón, Coahuila, by a group of journalists led by Antonio de Juambelz y Bracho, who sought to create an independent newspaper that would be a “defender of the community”. Currently, El Siglo de Torreón is published by Compañía Editora de la Laguna, S.A. de C.V. Patricia González-Karg de Juambelz and Enriqueta Morales de Irazoqui are the president and vice-president, respectively, of its Board of Directors, and Antonio González-Karg de Juambelz is the publisher’s general manager. El Siglo de Torreón has an average daily circulation of 34,500 copies and runs its own [digital portal](#).

El Diario de Yucatán

First published on 31 May 1925, El Diario de Yucatán is currently operated by Grupo Megamedia. The corporate name of its publishing company is Compañía Tipográfica Yucateca, S.A. de C.V. El Diario de Yucatán is managed by Carlos Rubén Menéndez Navarrete, and has an average daily circulation of 67,500 copies and its own [website](#).

Local newspapers

There are hundreds of local print publications published in Mexico. It is highly probable that many micro-local publications, which are published in rural or highly marginalized municipalities, are not registered in the PNMI, as there are few incentives for these organizations to declare their existence. On the other hand, many local media tend to be unsustainable and short-lived, given the adverse security and economic conditions for journalism in many Mexican states.

Online news

Mexican newspapers began disseminating information in digital formats in the early 2000s. For example, Grupo Reforma began publishing digital versions of its print content in 2000, El Universal launched its online edition in 2001, and Grupo Milenio did the same in 2002.

Migration of print media to the digital environment has entered a new phase in recent years, as media companies have begun to entirely scrap their print versions and instead publish exclusively online. In 2017, for example, the local newspaper La Jornada San Luis stopped printing copies and moved its news operation entirely online. Reporte Indigo, a weekly with circulation in the three most important urban centers in the country (Monterrey, Guadalajara, and Mexico City), decided to cancel its printed edition in 2018 to become exclusively an online publication. Another example is El Occidental, a newspaper belonging to OEM, with a long journalistic tradition in the capital of the state of Jalisco, which made the decision to become a weekly; that is, to print once a week and to rely on a more robust digital edition. This digital migration is probably going to accelerate in the future.

Most journalistic organizations with a strong reputation in Mexico are the digital versions of printed newspapers with a long tradition in the Mexican news market, according to data from SCImago Media Rankings[193]. This list includes the web portals of newspapers such as El Universal, El Informador, La Jornada, El Imparcial, El Sol de México, El Diario de Yucatán, Milenio, or Reforma, to name a few. Only three media in this ranking are native digital media (15%), namely Cuadratín, Animal Político and Sin Embargo (and Cuadratín was discarded, as the company considers itself a news agency and not a digital media outlet). In Mexico, SCImago registered 289 digital media in 2023.

[193] For more information, see the methodological section of this project: SCImago, "SCImago Media Rankings", SCImago Media Rankings, consulted on 25 January 2023, <https://www.scimagomedia.com/>.

Top 20 of digital media with high journalistic reputation in Mexico, 2023

Publication	Website	Global ranking	Score
El Universal	eluniversal.com.mx	253	67.75
El Informador	informador.mx	327	66.50
La Jornada	jornada.com.mx	363	65.75
Proceso	proceso.com.mx	574	62.50
El Imparcial	elimparcial.com	714	60.75
El Sol de México	elsoldemexico.com.mx	807	59.75
El Diario de Juárez	diario.mx	905	58.75
El Siglo de Torreón	elsiglodetorreon.com.mx	905	58.75
Diario de Yucatán	yucatan.com.mx	941	58.50
El Heraldo de México	heraldodemexico.com.mx	1,026	57.50
Quadratín	quadratin.com.mx	1,136	56.50
La Crónica de Hoy	cronica.com.mx	1,162	56.25
Milenio	milenio.com	1,187	56.00
Animal Político	animalpolitico.com	1,227	55.50
Sin Embargo	sinembargo.mx	1,273	55.00
Excélsior	excelsior.com.mx	1,332	54.50
Publímetro	publimetro.com.mx	1,359	54.25
Noreste	noroeste.com.mx	1,489	53.00
Reforma	reforma.com	1,530	52.50
El Siglo de Durango	elsiglodedurango.com.mx	1,589	52.00

Source: SCImago Media Rankings, 2023 • Created with Datawrapper

Reputation ranking of digital media (top 5 digital natives), Mexico, 2023

Publication	Website	Global ranking	Score
Animal Político	animalpolitico.com	1,227	55.5
Sin Embargo	sinembargo.mx	1,273	55.0
SDP noticias	sdpnoticias.com	1,727	50.5
La Silla Rota	lasillarota.com	1,960	48.0
Aristegui Noticias	aristeguinoticias.com	2,135	46.0

Source: SCImago Media Rankings, 2023 • Created with Datawrapper

The digital media platforms with the highest consumption in Mexico are those that were already market dominant in pre-digital times, according to data from a study for Google carried out by the Reuters Institute at Oxford University[194]. The only exceptions are Aristegui Noticias, Latinus and Animal Político (18.7%), which are digital native media.

[194] Nick Newman et al. (2022). Reuters Institute Digital News Report 2022. Oxford, UK: Reuters Institute for the Study of Journalism. 124–25.

Weekly use of digital media in Mexico, %, 2021

Online portal	Weekly use (%)
El Universal online	25%
TV Azteca Noticias	25%
Uno TV Noticias	22%
Televisa Noticias	22%
Aristegui Noticias	18%
Regional and local digital newspapers	18%
Imagen Noticias	16%
Reforma en línea	15%
CNN.com	14%
El Financiero en línea	12%
Radio Fórmula Noticias	11%
Latinus	11%
La Jornada en línea	11%
TV Local en línea	10%
Animal Político	10%
El Heraldo en línea	10%

Source: Reuters Institute study funded by Google, 2022 • Created with Datawrapper

Using the rankings from SCImago and Reuters Institute, we selected seven media which produce news exclusively in digital format, and which have a significant influence over the Mexican audience. These outlets are listed in chronological order, from the publication with the longest market presence to the one that was most recently founded.



La Silla Rota

La Silla Rota (meaning “the broken chair” in English) was founded in 1998 by Publicaciones Comunitarias S.A. de C.V. and Comunicación, Bienestar y Salud S.A. de C.V., publishers that also launched other digital journalistic projects such as Yo soy tú and Su médico. La Silla Rota is a digital media outlet that produces general news. It is managed by journalist Roberto Rock, and has regional editions in the states of Veracruz, Hidalgo, and Guanajuato. In SCImago’s digital reputation ranking, La Silla Rota ranks fourth among the five digital media with the best rating in Mexico.

SDP Noticias

Founded in 2004 by businessman Federico Arreola, SDP Noticias was initially a media outlet dedicated to reporting on the campaign of politician Andrés Manuel López Obrador, who ran for the presidency of Mexico in 2006, 2012, and 2018. In its first version, the publication was called El Sendero del Peje, alluding to López Obrador, who was popularly known as “el peje”. The name comes from “pejelagarto”, a fish from Obrador’s home Tabasco region. After the 2006 campaign, Arreola decided to keep the website, changed its name to SDP Noticias, and began to offer generalist news content. In 2017, Televisa bought 50% of SDP Noticias. Currently, its director is Federico Arreola and its publishers are Periódico Digital Sendero S.A. de C.V. and Grupo Televisa S.A.B. In the SCImago ranking, SDP Noticias ranks third among Mexican media.

Animal Político

The online publication Animal Político was co-founded by Daniel Eilemberg and Daniel Moreno in 2010. As of 2019, the chair of the publication’s board is businessman Gerardo Márquez Camacho[195]. Its publisher is Editorial Animal S. de L.R. Animal Político is a digital native media that describes itself as a creator of content “with rigor, accuracy and thought to serve citizens”[196]. The outlet’s sources of income include training, consulting, fact-checking (20%), commercial content (25%), advertising (20%), subscriptions (15%), and donations (20%). In the SCImago ranking, Animal Político appears in first place among born-digital media. It is in 15th place among the most consumed digital media in Mexico, according to the Reuters Institute.

[195] Gerardo Márquez. Frente a las mentiras. 23 September 2019. Animal Político. <https://www.animalpolitico.com/analisis/invitades/frente-a-las-mentiras>.

[196] Animal Político. (2023). Nosotros. <https://www.animalpolitico.com/quienes-somos>

Sin Embargo

Launched by journalist Jorge Zepeda Paterson on 6 June 2011, Sin Embargo is currently published by SinEmbargo S. de L.R. de C.V. and has a board of directors comprising Miguel Valladares, Pablo Valladares, Jorge Zepeda Patterson, Alejandro Páez Varela, and Rita Varela Mayorga. The director of Sin Embargo is Alejandro Páez Varela. In recent years, Sin Embargo has been very successful with its live broadcasts on YouTube, especially with the show titled “Los periodistas” (meaning “journalists” in English). In the SCImago digital reputation ranking, it takes second place among the top five digital natives.

Aristegui Noticias

The news portal Aristegui Noticias is led by journalist Carmen Aristegui, who runs the portal through the publisher Aristegui Noticias Network. The website was founded by Aristegui who, after a long career in radio and television, was fired in 2012 by radio network MVS for her critical coverage of the health of President Felipe Calderón Hinojosa. She then decided to launch her own digital venture. In the SCImago ranking, Aristegui Noticias ranks fifth among the born-digital media.

Latinus

The news portal Latinus was only launched in 2020, but despite its short period on the market, it has already seen significant success. The director of the portal is Carlos Loret de Mola. According to its website, Latinus is “a 100% digital platform designed to generate and distribute high-value content for consolidated Latino audiences in the United States”. However, the news they publish is mostly about Mexican politics. Their website does not specify who its owners are, nor can we find out which company is the publisher. According to journalistic reports, the co-owners of Latinus are Federico Madrazo Rojas and Alexis Nickin Gaxiola, people close to Mexican political groups[197].

El País Mexico edition

El País is a Spanish newspaper founded in 1976, which publishes general news and has a circulation that goes beyond Spain. On 17 March 2013, El País published a digital version for all of the Americas; at that time, it also opened newsrooms in Mexico and the United States, both managed by journalist Antonio Caño. In 2020, El País stopped printing newspapers in the Americas, and on 1 July of that same year launched a digital version exclusively for Mexico[198]. Although El País Mexico edition does not appear in the rankings researched for this project, its mentioning is important, as it is a digital media outlet that publishes relevant news.

[197] Álvaro Delgado Gomez. Una red de políticos prominentes y empresas (con acceso a dinero público) está detrás de Latinus. 20 March 2021. SinEmbargo MX. <https://www.sinembargo.mx/29-03-2021/3956818>

[198] Javier Moreno. Un compromiso con los mexicanos. 1 July 2020. El País, edición México. <https://elpais.com/mexico/2020-07-01/un-compromiso-con-los-mexicanos.html>

Sources of media financing

Media in Mexico has two main sources of financing: public funding and commercial advertising. Public financing comes from government budgets at federal, state, and municipal levels, from the three branches of the Mexican State (executive, legislative and judicial), and from autonomous bodies such as electoral institutes, transparency institutes, and human rights commissions. All these institutions finance the press through the purchase of advertising (known as official or “state” advertising) and payments for journalistic coverage[199].

The second source of financing for Mexican media is commercial advertising income. This type of financing implies, from a classic political economy perspective, the need for large audiences to whom the media markets advertising from private companies and brands[200].

In addition to these main sources of financing, some of the digital media in the country also generate resources by charging for the consumption of their journalistic content (like a paywall), as well as by selling memberships.

Public financing

The media in Mexico has been largely influenced by its historical context, developing in an earlier era. A semi-authoritarian political system dominated for more than seven decades, mainly during the 20th century, run by the Institutional Revolutionary Party (Partido Revolucionario Institucional, PRI). During those times, the media and journalists in general had little independence from the current state power, as the government was the main financier of the press. In those times it was common for journalists to receive their salaries directly from government agencies, and for the government to favor certain media through tax remissions, state subsidies, and the sale of materials at a discount, such as ink and paper. In exchange, the Mexican press was pro-government and avoided criticism of state power, being far removed from the Anglo-Saxon ideal of the press acting as a watchdog of democracy[201].

[199] There are thousands of institutions that allocate public resources to the media in Mexico. For example, there are 2,469 municipalities in the country. Presumably, all of them spend funds on official advertising. This is not including the count of all federal and state agencies.

[200] Dallas W. Smythe. (1977). Communications: Blindspot of Western Marxism. *Canadian Journal of Political and Social Theory* 1, núm. 3. 1–27.

[201] Sallie Hughes. (2006). *Newsrooms in Conflict...*, cit.; Chappell Lawson. (2002). *Building the Fourth Estate...*, cit.; Williams A. Orme. (1996). *A Culture of Collusion...*, cit.

At the end of the 1990s and during the first years of the 2000s, both the political scene and the media system in Mexico began to change. The PRI started to share power with other political forces. In addition, supposedly independent institutions were created to ensure the protection of human rights, and other rights such as electoral rights and the right to information. Moreover, journalists stopped being paid by the government, and public spending in the media became less opaque. On the other hand, media industries began to diversify as business groups emerged and expanded their media portfolios throughout the country, seeking other forms of financing. These transformations eroded the traditional model of relations between the public authorities and the press[202]. In this new era, media outlets began to be much more critical and independent of the government, although many of them maintained their official editorial lines.

The distribution of public resources to purchase advertising is one of the practices reminiscent of the past semi-authoritarian model of the relationship between the press and the public power. The main progress, in this respect, is the increased transparency of the public funding system. In the early 2000s, institutions were created to protect transparency and accountability at the federal and state levels, which allowed the public to know how much government institutions spend on official advertising.

In the six-year term of Vicente Fox (from 2000 to 2006), some MXN 16.32bn (US\$ 1.5bn at current prices) was spent by the government on advertising contracts with the media; during the administration of Felipe Calderón (from 2006 to 2012), that sum increased to MXN 38.72bn (US\$ 2.8bn); and during the mandate of Enrique Peña Nieto (2012 to 2018), some MXN 62bn (US\$ 3.1bn) was channeled to media outlets[203].

The main issue continues to be the discretionary nature of the allocation of public resources to the Mexican media. The local legislation on the matter has serious gaps. On the one hand, there is no transparent and reliable data to measure and evaluate the work of the media through metrics of readership or audiences, nor of population and geographic coverage. There is no reliable and updated directory of all Mexican media either. This information should, in theory, be used to allocate resources to the media that can serve specific populations with professional news content. Today, many media outlets receive public resources in spite of their low distribution or audience shares, or the low quality of their journalistic output. Existing laws do not allow for the creation of a mechanism for the distribution of resources that would prevent them from being concentrated within a handful of media companies.

[202] María Elena Hernández-Ramírez. (2006). La 'professionalisation' du journalisme au Mexique: le discours 'modernisateur' de Carlos Salinas de Gortari sur les relations presse-gouvernement. (These de doctorat, Paris 8) <http://www.theses.fr/2006PA082681>

[203] Fernando Camacho Servín. La Jornada: Gastó EPN en publicidad más de \$53 mil millones. 5 June 2019. La Jornada; Rubén Martín. Desenfrenado gasto oficial en publicidad. 29 June 2013. El Economista.

<https://www.eleconomista.com.mx/opinion/Desenfrenado-gasto-oficial-en-publicidad-20130629-0001.html>; Rodrigo Gómez García. (2021). El sistema de medios mexicano y la publicidad oficial en el Contexto de la Cuarta transformación. Ensayos sobre comunicación gubernamental en la cuarta transformación. ¿Cambio o continuidad?, ed. Julio Juárez Gámiz. Ciudad de México: Centro de Investigaciones Interdisciplinarias en Ciencias y Humanidades, UNAM, 74. It is important to note the volatility of the exchange rate between the Mexican peso and the dollar, as the average exchange rate with Vicente Fox was MXN 12 per US\$, however the exchange rate in the last year of Enrique Peña Nieto was MXN 20.6 per US\$. At the end of 2023, the exchange rate was US\$1 to MXN 17. The figures in US\$ presented in the report take into account these fluctuations.

According to the research from Article 19 and Fundar[204], in the first three years of the premiership of Andrés Manuel López Obrador (AMLO), there was a positive change compared to the regime of Enrique Peña Nieto, as a decrease in government funding spending was detected[205]. In 2020, the second year of AMLO’s administration, a total of some MXN 2.25bn (US\$ 100.8m) was spent on official advertising, which represents one fifth of Peña Nieto’s annual expenditure. This was in line with AMLO’s promise during the electoral campaign to reduce spending in this area. However, the government has not solved the problem of discretion in the allocation of resources, with a high concentration of all advertising spending still found in a certain few media outlets[206].

Top ten beneficiaries of public advertising (2019-2021)

Media outlet	Total (MXN m)	Total share, %
Grupo Televisa S.A de C.V.	933.00	10.79%
Estudios y TV Azteca S.A. de C.V.	848.75	9.81%
La Jornada, Demos, Desarrollo de Medios S.A. de C.V.	771.16	8.92%
Medios Masivos Mexicanos S.A. de C.V. (varios periódicos)	521.52	6.03%
Grupo de Radiodifusoras S.A. de C.V. (Grupo Fórmula)	322.18	3.73%
Telefórmula, S.A. de C.V.	195.25	2.26%
Centro de Cultura Nuestra América A. C.	191.78	2.22%
Organización Editorial Acuario S.A. de C.V.	186.24	2.15%
Milenio Diario S.A. de C.V.	183.78	2.12%
Edición y publicidad de medios de los Estados S. de R.L. de C.V.	171.87	1.99%
768 other outlets	4,323.22	49.99%
Total	8,648.74	100.00%

Source: Article 19, Fundar • Created with Datawrapper

[204] Article 19. (2022). En la primera mitad del sexenio persisten las malas prácticas en publicidad oficial; urge que el Congreso legisle. <https://articulo19.org/publicidad-oficial-2021/>
 [205] Rodrigo Gómez. (2020). El rol del Estado en el Sistema de Medios Mexicano...cit; Rodrigo Gómez García. (2021). El sistema de medios mexicano..., cit.
 [206] Rodrigo Gómez García. (2021). El sistema de medios mexicano..., cit. 75–82.

The top beneficiaries of state advertising are the two largest nationwide television stations in the country, Televisa and Televisión Azteca. Between them, they account for more than 20% of all awarded public resources. This is hardly a surprise, as during the last 30 years, these two companies have been highly favored by different Mexican governments, including the current one.

Printed newspapers are also subsidized through the state advertising policy, with La Jornada, a publication related to the current government, being the third largest recipient of state funds. This is followed by Medios Masivos Mexicanos, a company that encompasses dozens of newspapers. The eighth largest recipient of state funds is Organización Editorial Acuario, also a publisher of printed newspapers, followed in ninth place by another publisher, Milenio Diario. These newspaper publishers account for 19% of the total public advertising expenditure. Two major radio broadcasters are on the list: Grupo Fórmula and Telefórmula. On the other hand, some media that received public cash during Peña Nieto’s presidency, such as Grupo Empresarial Ángeles, which runs Imagen Televisión, Organización Editorial Mexicana (OEM), El Universal and others, no longer appear among the top ten recipients.

The model of financing private media through public resources has had pernicious effects on the Mexican media[207]. The government and public institutions often use these resources to reward those media outlets which are sympathetic to certain governments, or to punish those that are critical of them. Also, given the lack of information and regulation, it is very difficult to measure the societal benefit of this public policy. As a result of this practice, many media outlets have become dependent on state financing. A significant number of media outlets, in order to maintain this type of financing, lean towards more official journalistic coverage and a pro-government editorial agenda. In addition, historical dependence on state money has limited the effort and creativity of some media companies to experiment with alternative sources of financing. Finally, state financing has distorted the media market, as there are many media outlets that solely devote themselves to reproducing information from state agencies and publishing low quality information.

[207] Rodrigo Gómez García. (2021). El sistema de medios mexicano...cit.; Rodrigo Gómez García. (2020). El rol del Estado en el Sistema de Medios Mexicano, ...cit.

Private financing

As there are few media companies listed on the stock market, there is poor transparency over the financial performance of media outlets in Mexico. Media companies are not obliged to make their financial data public. The Covid-19 pandemic had its greatest impact on ad spending in the years 2020 and 2021. Cultural consumption habits of the population, coupled with the increased consumption of digital media to the detriment of more traditional formats, has also led to major changes in the ad spending market in Mexico.

Revenues from commercial advertising sales by media

In US \$ million

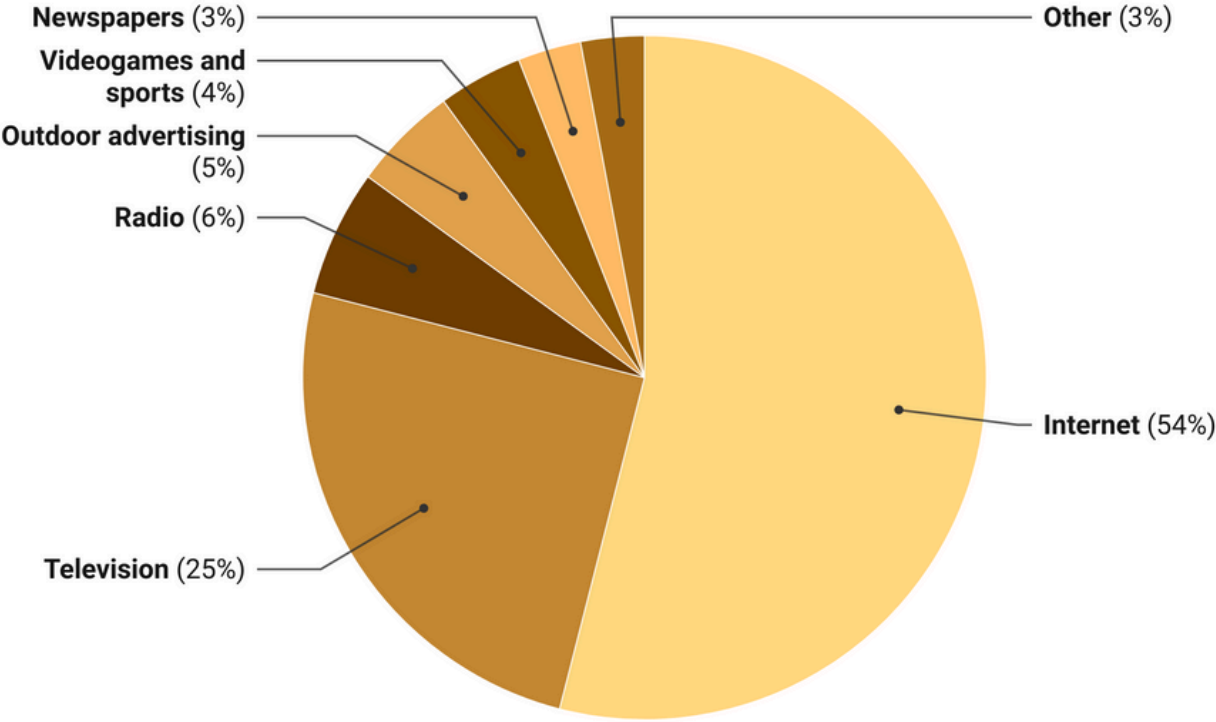
	2020	2021	2022
Print newspapers	214	203	194
Digital newspapers	16	16	17
Radio	320	359	386
Television	1,517	1,640	1,663
Internet	2,070	3,221	3,641

Source: PwC • Created with Datawrapper

The online sector claimed more than half of the ad revenue market (54%) in 2022, followed by television. Television advertising revenues have declined in recent decades, but are now seeing a more stable situation (although this does not indicate a recovery)[208]. Radio and print press, two sectors that for many years have shown a steady decline in their economic earnings from advertising sales, come last. For comparison purposes, in 2005, television had 54% of the ad market, radio 9.5%, newspapers 7.8%, and the internet 4.6%[209]. In less than two decades, television has ceased to be the largest recipient of advertising resources, while the internet went from last to first place in this ranking.

[208] Soto Galindo. Internet es el gran ganador de la pandemia. 15 July 2022. El Economista. <https://www.eleconomista.com.mx/empresas/Internet-es-el-gran-ganador-de-la-pandemia-20220715-0020.html>.
 [209] Vidal Bonifaz. Mercado mexicano de la publicidad, 2005-2014". 2 June 2015. La Rueda de la Fortuna <https://ruedadelafortuna.com.mx/2015/06/02/mercado-mexicano-de-la-publicidad-2005-2014/>.

Distribution of advertising expenditure by media sector, 2022



Source: Soto Galindo with data from PwC • Created with Datawrapper

What is striking and worrying is that two U.S. technology giants, Google (Alphabet) and Facebook (Meta), are responsible for more than 80% of digital advertising revenues in Mexico, which clearly affects the financial sustainability of the Mexican media. These monopolistic practices by Google have already caught the attention of COFECE, the institution in charge of monitoring economic competition. This situation has appeared in other countries too, and in some of them it was solved through agreements, where the tech giants agreed to share some of the revenue from their digital advertising with media content creators. However, these agreements are few and far between.



Chapter 3

Technology, Public Sphere and Journalism

Telecommunication Sector Overview

Mexico is a country dependent on infrastructure, technological goods, and services. In fact, it is known for being a manufacturing economy that serves various industries, including production of various technologies for products such as semiconductors, smart television sets, automobiles, and airplane turbines[210].

Mexico's geographical proximity to the U.S. as well as being part of the North American Free Trade Agreement, now known as USMCA[211], positions Mexico as a key strategic supply partner of the U.S. The ongoing global competition for technological supremacy between the U.S. and China is a major factor in the relationship between Mexico and the U.S.[212].

Foreign direct investment (FDI) plays a key role in the overall investments in Mexico. The FDI has practically equalled public investments since 2019[213]. However, FDI has led to a high level of concentration in various industries as it was not well connected with local companies. This has resulted in what Dussel Peters called "a lack of technological spillovers"[214]. Both public investments and a public policy that would promote linkages between those investments, including FDI, are needed.

In the telecommunication sector, investments have been increasing in recent years, driven by the dynamic growth of the sector as well as the deployment of state-of-the-art fixed and mobile infrastructures. For example, during the third quarter of 2021, the telecommunication and broadcasting sectors contributed 3.6% to Mexico's GDP, which is the equivalent of MXN 627bn out of a total of MXN 18.315bn[215].

[210] Contreras, O. and García, M. (2019). Pequeñas y medianas empresas tecnológicas en México: distribución regional e inserción en cadenas globales de valor. *Región y sociedad*, 31. <https://doi.org/10.22198/rys2019/31/1234>

[211] The previously called North American Free Trade Agreement (NAFTA), better known by its acronym in English, NAFTA, was renegotiated and a new version entered into force on 1 July 2020. It is called the Treaty between Mexico, the United States and Canada (T-MEC) and in English US-Mexico-Canada Agreement (USMCA). To review the changes between NAFTA and T-MEC, we recommend Contreras, Ó. F., Cánovas, G. V., & Durán, C. R. (2020). *La reestructuración de Norteamérica a través del libre comercio: del TLCAN al TMEC*. El Colegio de México AC.

[212] Dussel Peters, E. (2022). The new triangular relationship between the US, China, and Latin America: the case of trade in the autoparts-automobile global value chain (2000-2019). *Journal of Current Chinese Affairs*, 51(1), 60-82.

[213] Ortiz, S. (2022) La inversión extranjera directa en México: Análisis de sus determinantes según características de las industrias. *Investigación Económica*, 81(321), 120-155.

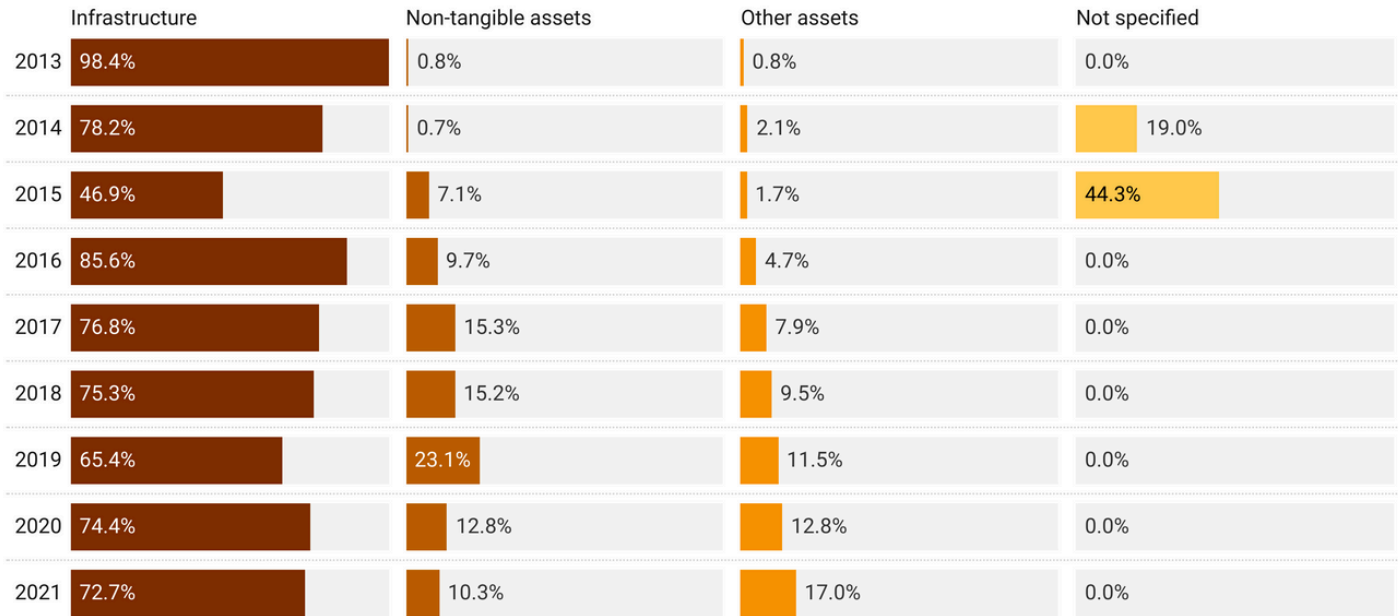
[214] Dussel Peters, E. (2018). Cadenas globales de valor. Metodología, contenidos e implicaciones para el caso de la atracción de inversión extranjera directa. In: E. Dussel P. (coord.). *Cadenas globales de valor. Metodología, teoría y debates* (pp. 45-66). México: cechimex-unam. <http://dx.doi.org/10.22201/cechimex.9786073002899p.2018>

[215] Federal Telecommunications Institute, Statistical Yearbook 2022. IFT. Mexico.

The telecommunications sector has steadily increased its contribution to the total GDP from 1.8% in 2014 to 4% at the end of 2022[216], standing out among other industries, despite a series of macroeconomic challenges created by the Covid-19 pandemic between 2020 and 2022. The sector has seen an incessant growth and innovation in segments such as voice, paid channels and content, as well as an expansion of fixed and mobile connectivity. Additionally, next-generation networks are being deployed and technological infrastructure is getting a facelift.

Since 2013, the private sector investment in the industry has been focused on infrastructure. Although it has remained constant during the past five years, a slowdown in its growth has been recorded since 2016. Private sector investment reached MNX 96.496bn in 2022, a significant decrease compared to the previous year. Mainly 10 telecommunications companies, eight of them Mexican and two foreign[217], have been responsible for the bulk of this investment.

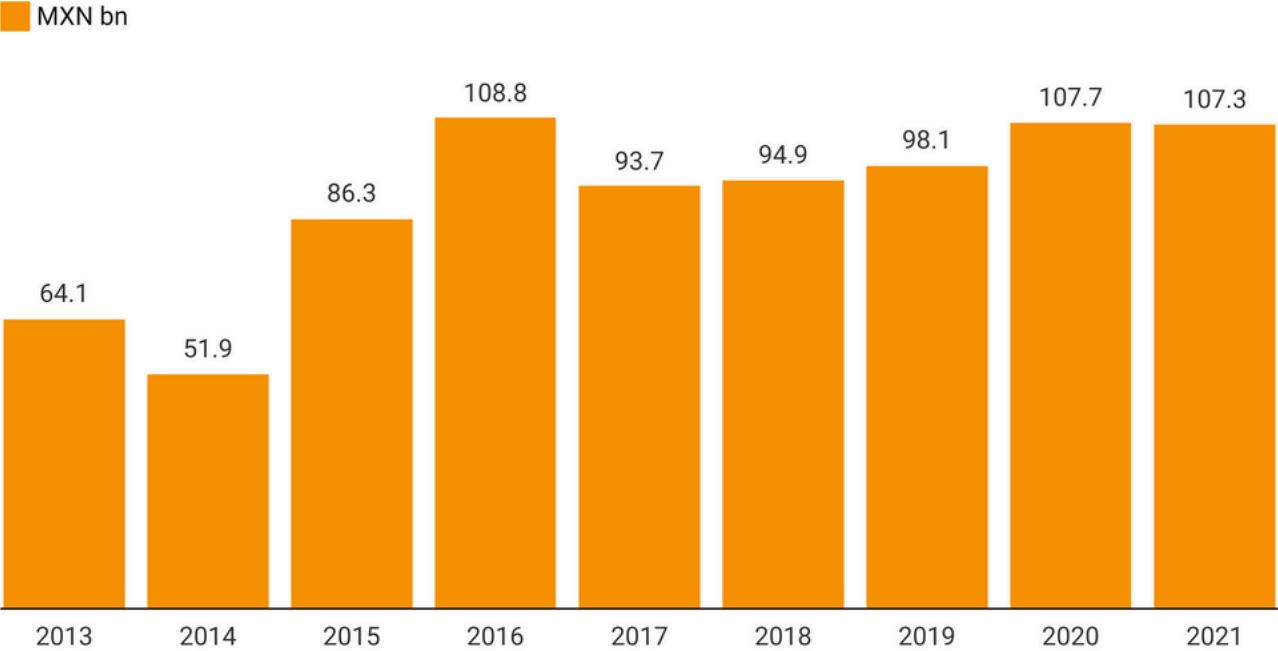
Target of private investment in telecommunications (%), 2013-2021



Source: authors' own calculation with data from IFT 2022, pp. 13. • Created with Datawrapper

[216] IFT Statistical Yearbook 2022, *cit.*; Hernández, C. (2023) Dinámica de las telecomunicaciones en 2022 y prospectiva 2023. <https://www.theciu.com/publicaciones-2/2023/1/2/q2upey2r3zbazdpfnbuoohfcy6rbv>; Gómez, R. (2020). Inversión en Telecomunicaciones 2013-2019: un corte de caja, en Gómez, R (ed.) A seis años de la Ley Federal de Telecomunicaciones y Radiodifusión. Análisis y propuestas. Ciudad de México: Tintable/Amedi.
 [217] Gómez, R. (2020). Inversión en telecomunicaciones, *cit.*

Private investment in telecommunications, MXN bn, 2013-2021



Source: authors' own calculation with data from IFT 2022, pp. 13. • Created with Datawrapper

On the other hand, the regulatory agenda of the Federal Telecommunications Institute (IFT) is key to the growth of the sector. The year 2023 is considered especially important as it marks 10 years since the adoption of the constitutional reform of the telecommunication sector in Mexico. The third review and implementation of new measures of asymmetric regulation on América Móvil, a dominant player in telecommunications (AEP-T), were carried out in 2023[218] and approved later in 2024. The planned auction of spectrum frequencies for the offer of 5G services and the creation of the National Information System of Infrastructure (SNII)[219] were scheduled to take place in 2023, but did not materialize by November 2024. Between June 2013 and the end of 2022, prices of telecommunication services as a whole fell by 31%.

[218] See the chapter on regulation in Media Influence Matrix (Argelia Muñoz (postdoc UAM-C), Rodrigo Gómez (UAM-C), Juan Larrosa Fuentes (ITESO), Media Influence Matrix: Mexico. Government, Politics and Regulation, 2022, available online at <https://journalismresearch.org/wp-content/uploads/2022/11/Mexico-Regulation-FINAL-REPORT.pdf>) where dominant position and the asymmetric measures imposed on América Móvil are explained.

[219] The SNII is envisaged to be a tool that offers detailed information on availability, location, capacity and deployed use of the existing telecommunications and broadcasting infrastructure in Mexico, to ensure that investments are focused on areas and regions without coverage, as well as to reduce costs. In short, the SNII seeks to make efficient use of the infrastructure to offer better services while avoiding and reducing barriers to competition and information asymmetries between operators.

When it comes to global tech companies operating in Mexico such as Alphabet, Meta, Microsoft, Twitter, Amazon, Apple or Netflix, there is very little information publicly available about their operations in the country. Most of these companies dominate various tech services markets. For example, Alphabet, with its Google search engine, controls 94% of the online search market in Mexico; similarly, its Chrome browser commands nearly 76% of the market followed distantly by Apple's Safari with 12.6%. In the case of operating systems, the situation is less alarming, yet that market is also significantly concentrated with Microsoft leading with 48.65% followed by Alphabet's Android with 34.7%, and in the third and fourth place, Apple's iOS and macOS with 10.22% and 3.49%, respectively. Finally, on the social media market, Facebook has a significant 70.96% share followed by YouTube with 11.67% and Twitter with 8.39%^[300].

The leading companies on the Mexican online market are mostly U.S.-owned. These companies add, curate, distribute and organize news content. They are the main access platforms for the most important news as well as for disinformation content.

The global digital platforms take advantage of the news content generated by the local media to expand their reach at national level and to attract advertisers to their platforms. They generate the highest profits from advertising in the hybrid media systems^[301].

The relationship between technology and news content has a direct impact on the financing of media companies focused on journalism. Advertisers place most of their investments in various digital platforms rather than in media outlets specialized in news. This has led to a financial crisis among local media that have been faced with significant cuts in ad revenue.

Another aspect of the relation between technology, journalism, and the public sphere is the impact of WikiLeaks-type disclosures, which generate public debate but, at the same time, show how vulnerable to hackers strategic, confidential, or classified government-level information can be. In a similar manner, the use of spyware technology is another important aspect of the relation between technology, information use, privacy, and surveillance. It also speaks to the violation of human rights by both state institutions and private businesses.

[300] This trend is replicated in several Latin American markets. To have a comparative perspective on the region, see the OBSERVACOM study: ¿Hay concentración en internet en América Latina? casos: Argentina, Colombia, México, Perú y Uruguay. <https://www.observacom.org/hay-concentracion-en-internet-en-america-latina-el-caso-uruguay/>

[301] For a review of the hybrid media system concept see: Chadwick, A. (2017). *The hybrid media system: Politics and power*. Oxford University Press.

Technological Overview

Infrastructure

Mexico boasts a high level of telecommunication services penetration throughout its territory. However, there are still several regions in the country that lack coverage, which leads to inequalities. The country needs public policies to address those inequalities as the market itself has thus far failed to create the conditions to ensure communities that do not present a profitability potential for private investors have access to services.

Public policy initiatives promoted by the Mexican state such as plans to introduce shared networks or an “internet for all” program aim to change this situation. However, despite good intentions, such actions are yet to be implemented as resources allocated to achieve those objectives are insufficient.

Fixed Broadband

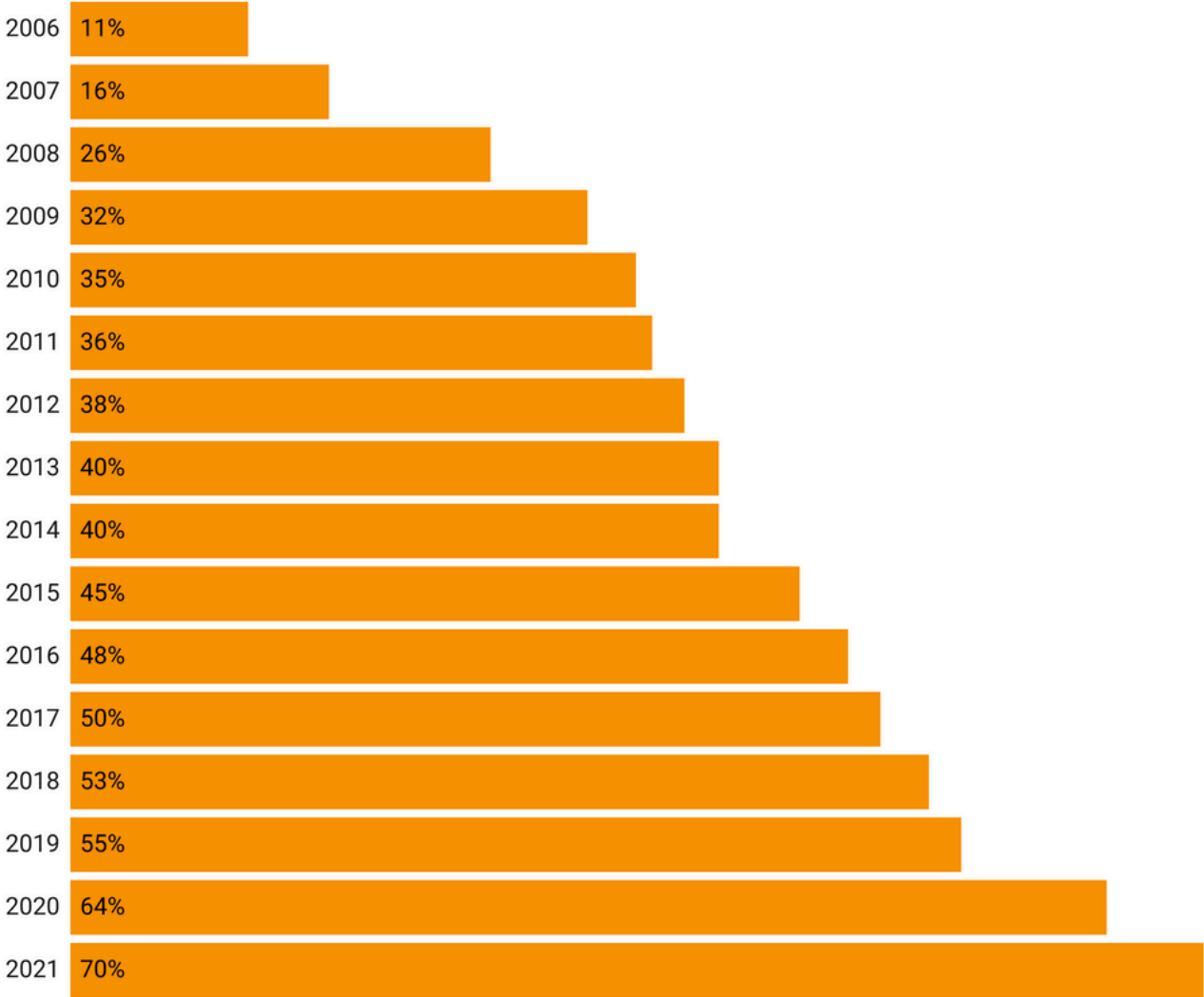
In urban areas, internet penetration has significantly increased in recent years. For example, fixed internet services grew by almost 100% over a span of 10 years. In 2011, internet access was present in 36 out of 100 Mexican households. By 2021, it expanded to 70 out of 100 households nationwide^[302].

Although the nationwide picture is rather uplifting, there are substantial differences between states and regions. For example, Mexico City and states such as Nuevo León, Baja California, and Baja California Sur have the highest internet access per 100 households, with 96, 87, 85, and 80, respectively. On the other hand, states such as Tabasco (with 31% of total households), Oaxaca (with 26%), and Chiapas (with only 23%) have the lowest internet penetration in the country^[303].

[302] IFT Statistical Yearbook 2022, *cit.*, p. 20.

[303] IFT Statistical Yearbook 2022, *cit.*, pp. 22–23.

Fixed internet penetration (% of total number of households), 2005-2021



Source: IFT 2022, pp. 22. • Created with Datawrapper

As it started from a low level of infrastructure deployment, Mexico has experienced the fourth highest growth in fixed broadband penetration among OECD countries from June 2013 to June 2022, a cumulative 93%. It was topped only by Turkey, which grew by 104%. According to the OECD, as of June 2022, Mexico’s annual growth in fixed broadband penetration has stood at 5%, while the average growth of the other OECD countries has been 2.5% [304].

[304] IFT (2023). Mexico among the countries with the highest growth in fixed broadband: OECD. Press Release, 1 March 2023, available online at https://www.ift.org.mx/sites/default/files/comunicacion-y-medios/comunicados-ift/comunicado20ift_3.pdf.

Mexico has also experienced progress in the speed of fixed broadband line connectivity. According to the IFT, in 2021, 81% of all the connected households reported a download speed between 10 Mbps and 100 Mbps, a share that has remained stable since 2017[305]. That speed level is better than other countries in the region such as Colombia and Costa Rica, or than in other OECD members such as Turkey. In Mexico only 6% of internet subscriptions have connectivity speed below 10 Mbps, less than in countries such as Chile (10.4%), Canada (7.9%), Colombia (30%) or Costa Rica (56%). On the other hand, when it comes to subscriptions to fixed broadband that exceed 100 Mbps, only 8.1% of Mexican households enjoy those speeds. In contrast, the figure in Chile is 71.1%. The average download speed in Mexico in January 2021 was 44 Mbps, well below the OECD average of 119 Mbps[306].

The technologies used to access fixed broadband internet play an important role in the quality and speed of internet connectivity. In June 2022, coaxial cable accounted for 37.6% of all internet connections in Mexico. Optic fiber was used by 36.9%, DSL by 19.1%, and 6.4% were provided by satellite and mobile technology[307]. Optic fiber had a year-on-year growth rate of 34.9% in December 2021. In contrast, DSL decreased by 17.7% in the same period, a sign that fixed infrastructure has been refurbished thanks to more flexible technologies introduced by the four largest telcos that compete in Mexico's biggest urban areas.

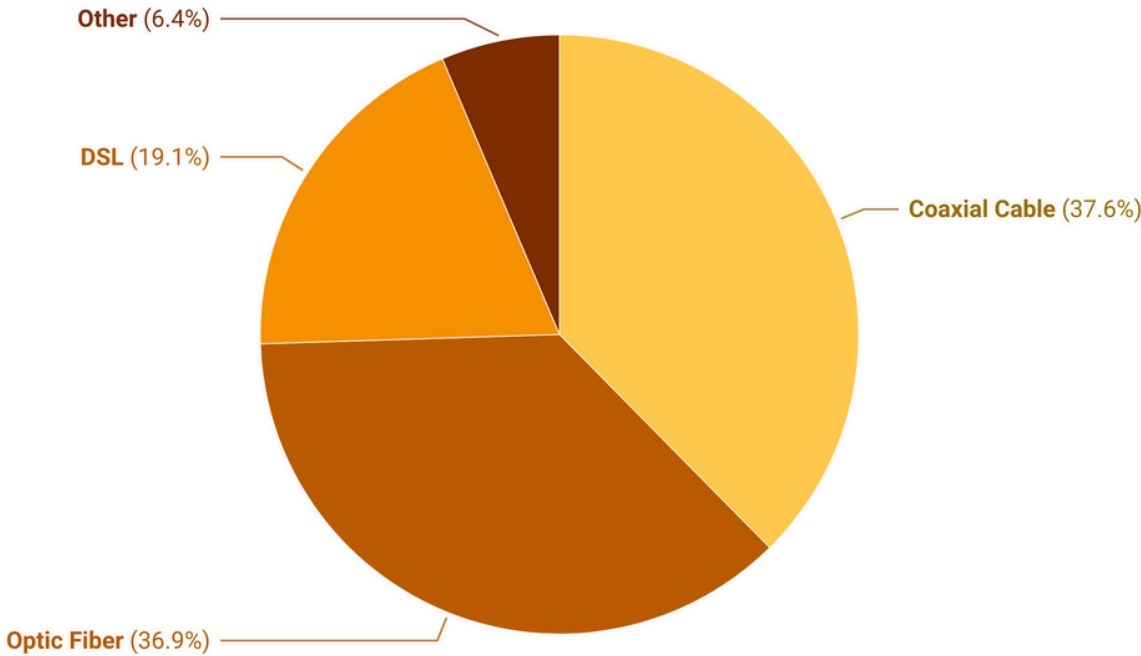
This information helps us calibrate the deployment of fixed broadband internet infrastructure at a national level in relation to recent years. However, as we mentioned earlier, in order to have a truly national diagnosis, this information must be analyzed at both the local/state level and in rural and urban areas, since the majority of fixed broadband lines are concentrated in large cities and urban areas.

[305] IFT Statistical Yearbook 2022, *cit.*, p. 24.

[306] Vargas, F. (2022). Banda Ancha Fija: Conectividad en la Métrica de la OCDE. 4 July. Ciu. <https://www.theciu.com/publicaciones-2/2022/7/4/banda-ancha-fija-conectividad-en-la-mtrica-de-la-ocde>

[307] IFT (2023). OECD, *cit.*

Access to fixed internet, by connection technology (% of households), 2022



Source: authors' own calculation based on data from the IFT (2023) • Created with Datawrapper

Major gaps remain between rural and urban areas in the use of fixed telecommunications services. According to data from the IFT, out of some 8.4 million rural households in Mexico, only 4% have triple-play service; 16% have two services; 37% have only one such service; and the remaining 43% do not use any fixed telecommunications services[308]. On the other hand, of the 28.2 million urban households in the country, 27% benefit from the triple-play package, 32% have access to two internet services, 20% have one and the rest of 22% do not have any fixed telecommunications services[309]. This gap is illustrative of the poverty and marginalization of approximately 5.6 million households in urban areas.

[308] IFT Statistical Yearbook 2022, *cit.*, p. 16.
 [309] IFT Statistical Yearbook 2022, *cit.*, p. 18.

Mobile Broadband

Mobile broadband has also experienced significant growth in Mexico in recent years. According to OECD data, from June 2013 to June 2022, Mexico had the second highest growth rate in wireless internet penetration, from 23 subscriptions per 100 inhabitants to 89, second only to Colombia[310]. In fact, Mexico stands out among OECD countries in this area, being ranked third with 113 million mobile broadband subscriptions, surpassed only by the U.S. with 570 million subscriptions and Japan with 242 million subscription in June 2022[311]. Mexico also reported an annual growth rate of the mobile broadband services of 9.2% between June 2021 and June 2022, above's OECD average growth rate of 5.8%.

However, due to the inequalities and economic divides in Mexican society, 80.5% of mobile phone and mobile broadband subscriptions are based on prepaid contracts. Only 17.2% of Mexicans have a postpaid contract[312]. Moreover, those subscriptions are concentrated in urban areas and in the country's wealthiest states. For example, while Mexico City registers 116 mobile service subscriptions per 100 inhabitants, states like Oaxaca and Chiapas only have 81 and 69 mobile subscriptions, respectively, per 100 inhabitants[313].

The deployment and updating of technological infrastructure is influenced by various factors such as economic capacity, competition, population density, territorial characteristics, and the implementation of public policies. Therefore, the context in each Mexican state largely determines its technological advancement.

[310] IFT (2023). OECD, *cit.*

[311] OECD Broadband Statistics, see more at <https://www.oecd.org/sti/broadband/broadband-statistics/>

[312] IFT Statistical Yearbook 2022, *cit.*, p. 35.

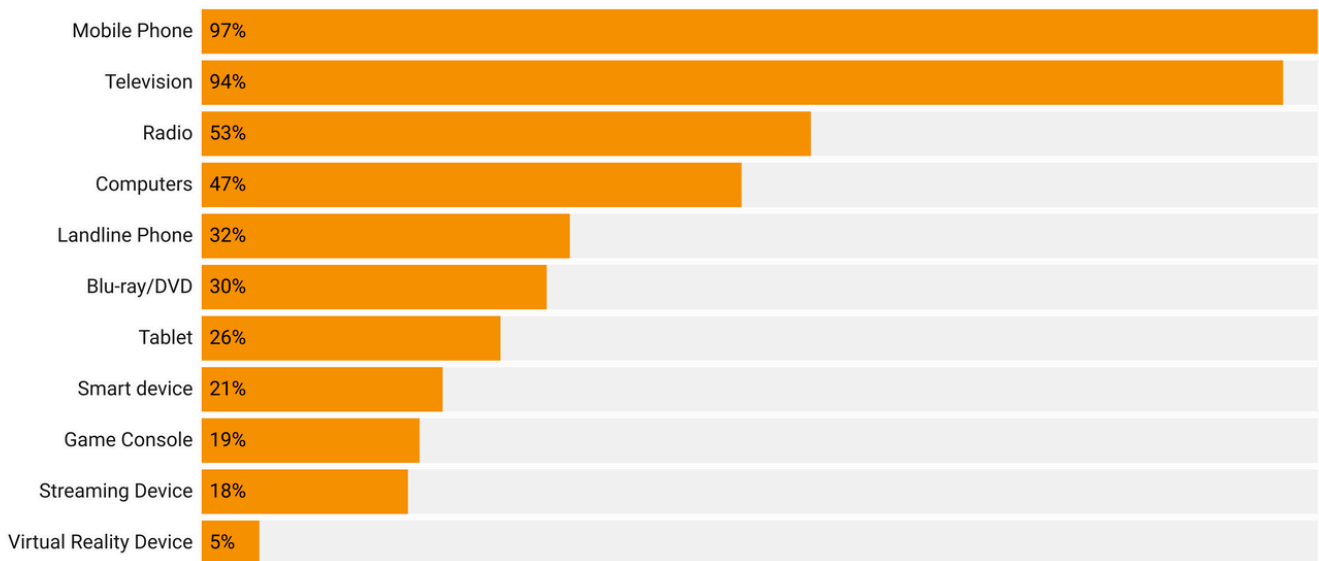
[313] IFT Statistical Yearbook 2022, *cit.*, p. 32.

Devices

The National Institute of Statistics, Geography and Informatics (INEGI) through its National Survey on Availability and Use of Information Technologies in Households (ENDUTIH) and the Federal Telecommunications Institute (IFT) through its National Survey of Audiovisual Content Consumption (ENCCA) are the main sources of data used in the following sections of this report.

Mobile phones are the devices with the highest penetration in Mexican households, 97% of them having at least one, according to the most recent data published by the ENCCA. Mobile phones are followed by television, with 94% of the households owning a TV set and radio with a 53% household penetration.

Electronic devices ownership (% of households), 2021-2022

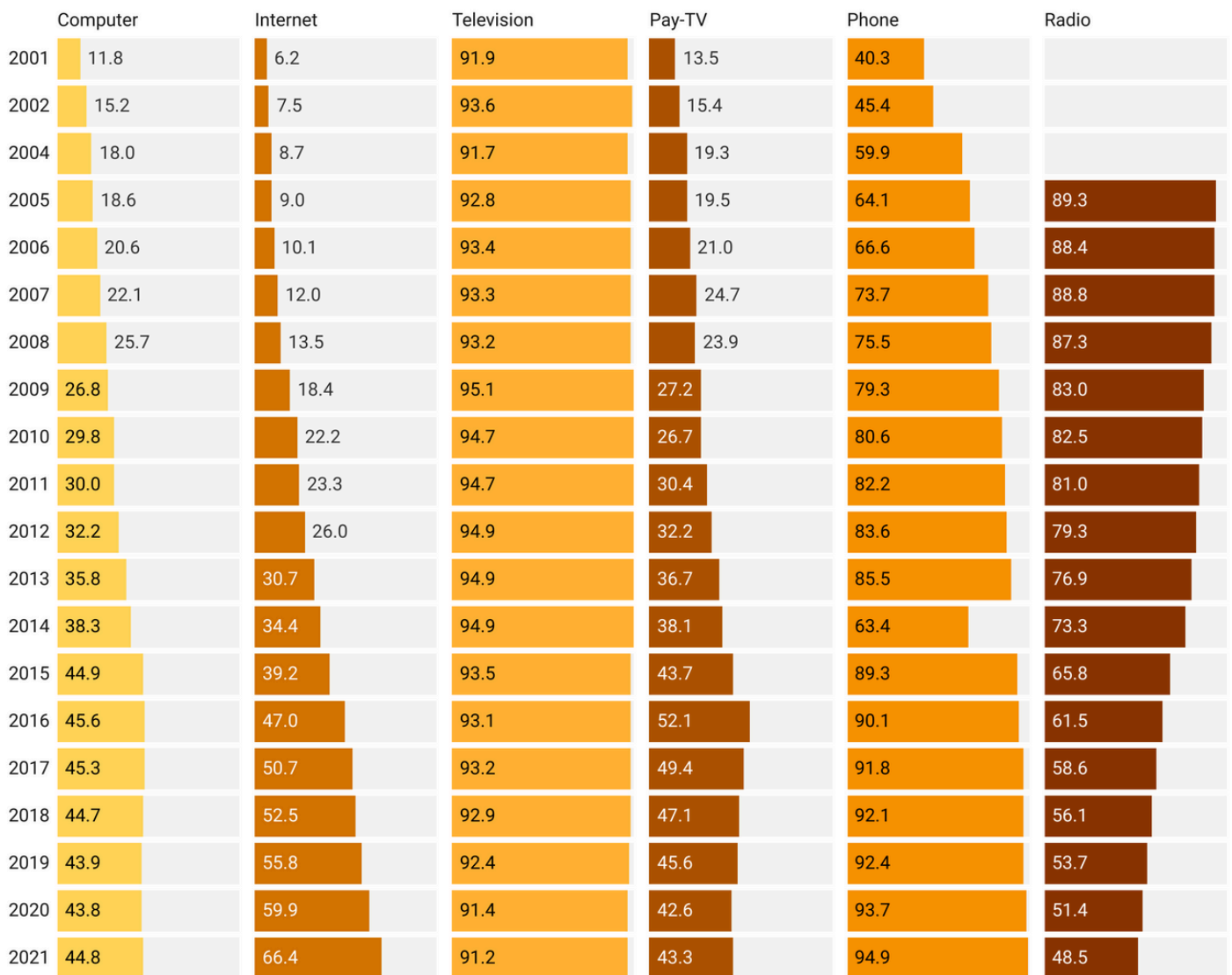


Source: ENCCA (2021) • Created with Datawrapper

According to the ENDUTIH survey, use of phones is the most widespread in Mexico, present in 94% of the country’s households, a figure that includes both cell phones and landline telephony. However, over a longer period of time, it is the television sets that have had the highest penetration in Mexico, with a penetration of over 91% during the last 20 years. In 2021, 91.2% of Mexican households, which is the equivalent of 33.3 million households, had at least one television set, whether analog or digital. That marked a slight decrease compared to 2009 when a record 95.1% penetration of households (or 26.5 million homes) was reached.

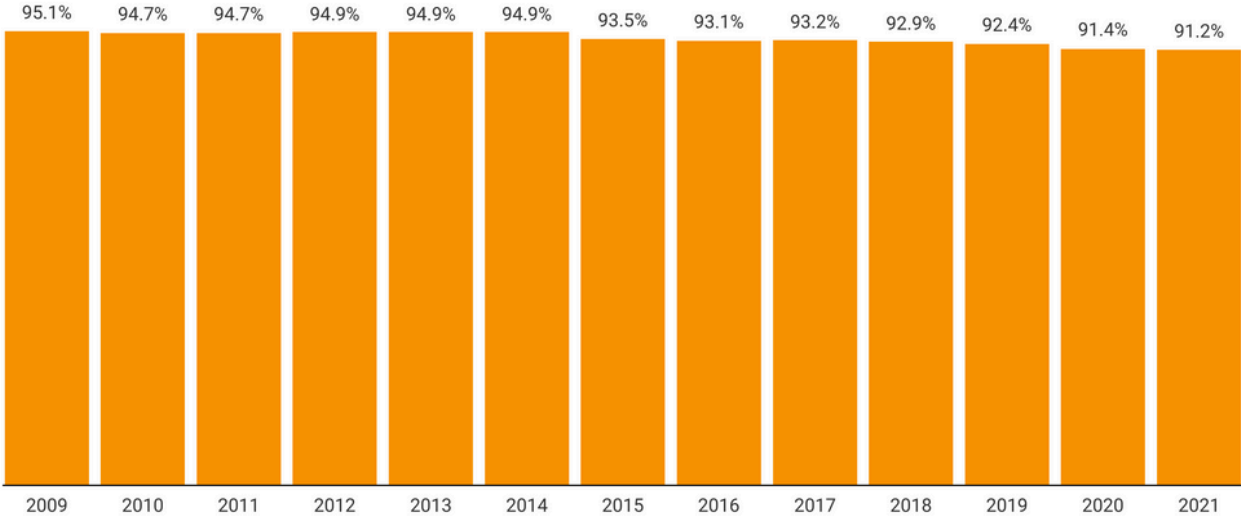
Devices that provide internet access have steadily increased their penetration, from a mere 6.2% of households in 2001 to 66.4% in 2021. The penetration of radio equipment, on the other hand, has decreased from 89.3% in 2005 to only 48.5% in 2021.

Penetration of communication technology equipment (% of households), 2001-2021



Source: ENDUTIH (2021) • Created with Datawrapper

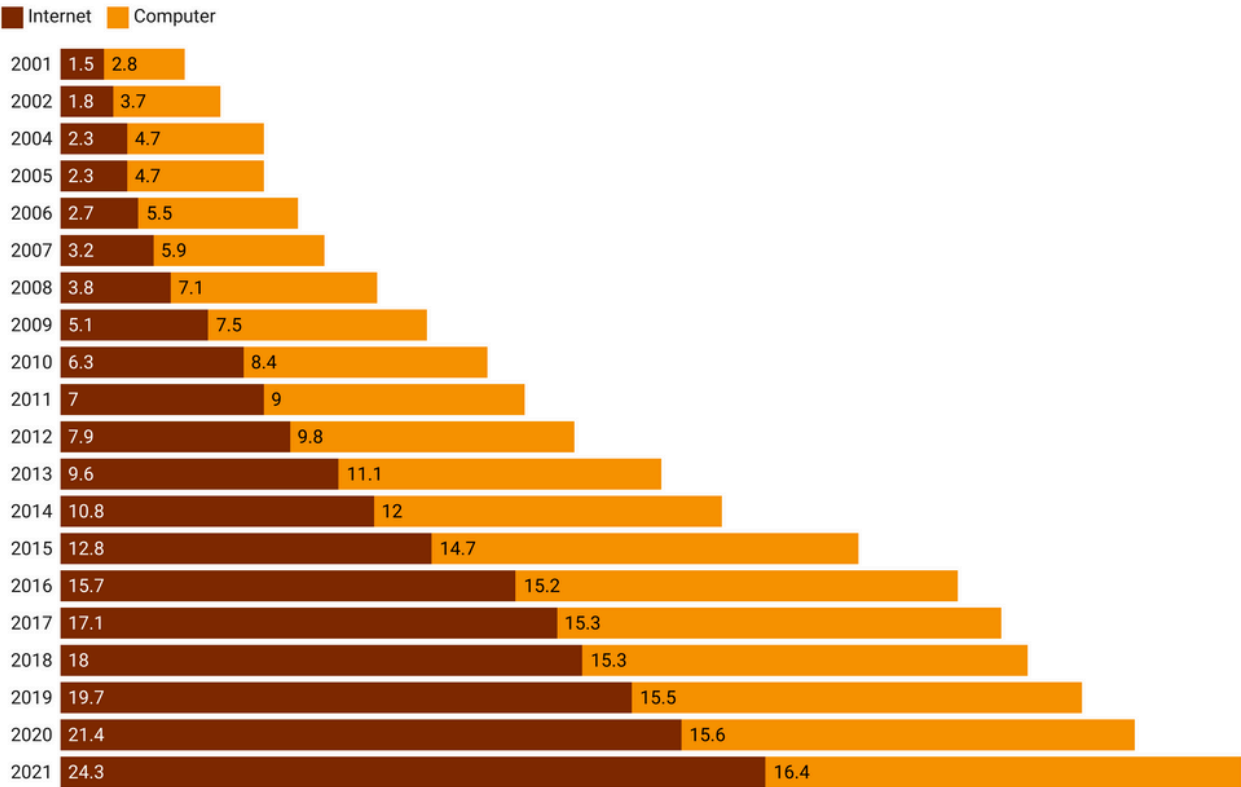
Television penetration (% of households), 2009-2021



Source: ENDUTIH, 2021 • Created with Datawrapper

The internet saw an increase in penetration from 1.5 million households (6.2%) in 2001 to 24.3 million (66.4%) in 2021. In spite of this strong growth, Mexico still sports a digital divide that government programs have not been able to close. Computers, on the other hand, were present in 2.8 million Mexican households (11.8%) in 2001, a figure that increased to 16.4 million (44.8%) in 2021. Computer penetration has remained relatively stable in Mexico since 2015.

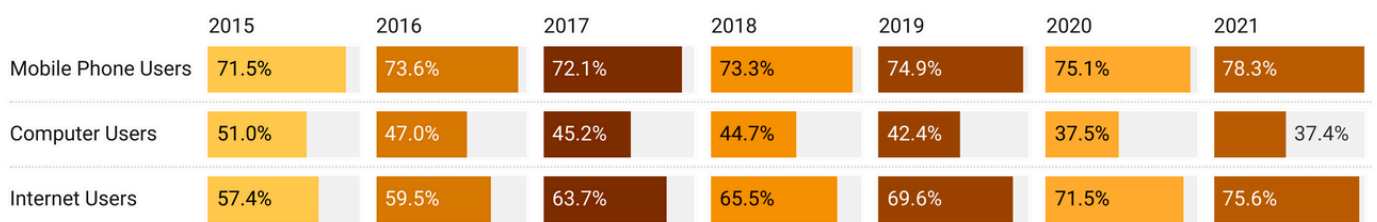
Internet and computer penetration (number of households, in million), 2012-2021



Source: ENDUTIH (2021) • Created with Datawrapper

Use of mobile phones has experienced a significant upward trend with a total of 91.7 million users in 2021, which represented 78.3% of the Mexican population. A similar trend was registered by the internet consumption that reached 88.5 million consumers in the same year, which accounted for 75.6% of the country's population. These figures have been increasing every year whereas the use of personal computers or PCs has decreased from 49.8 million users in 2017 to some 43.8 million in 2021, which accounted for 37.4% of the population.

Use of mobile phones, computers and internet (% of users), 2015-2021

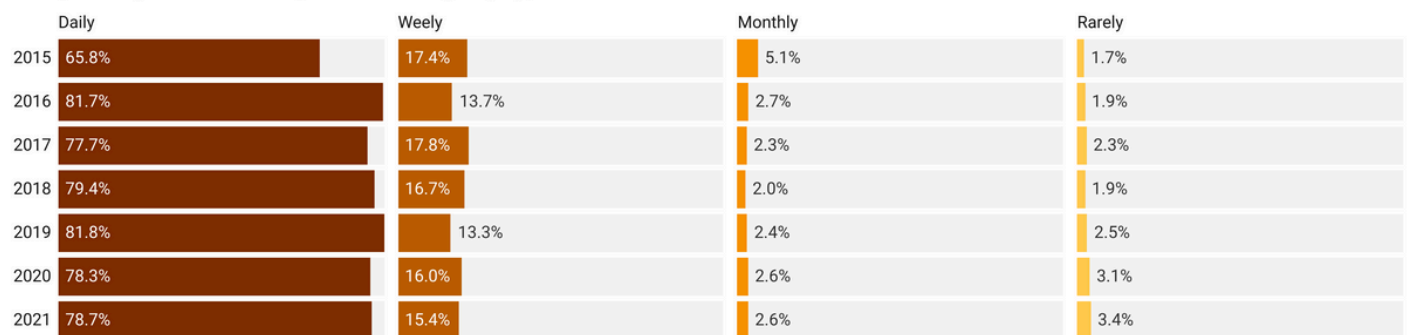


Source: ENDUTIH (2021) • Created with Datawrapper

Usage Patterns

Mobile phones are used with high frequency in Mexico. In 2021, 78.7% of people used them daily, 15.4% used them once a week, 2.6% used them once a month, and 3.4% used them less frequently. The daily use of cell phones increased from 65.8% in 2015 to a peak of 81.8% in 2019.

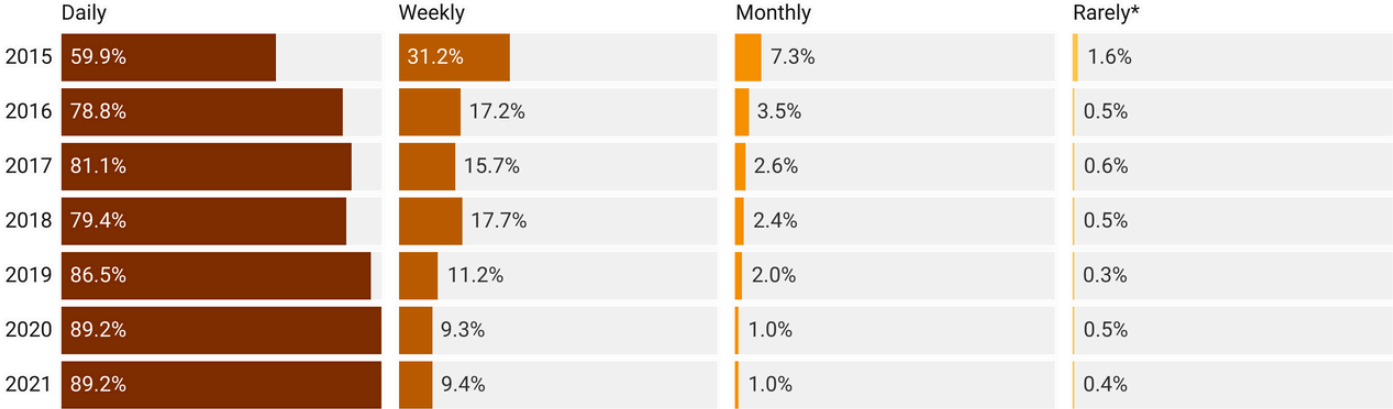
Frequency of mobile phone usage (%), 2015-2021



Source: ENDUTIH (2021) • Created with Datawrapper

Regarding the internet, there is a growing trend in its daily use. It increased from 59.9% in 2015 to 89.2% in 2021.

Frequency of internet usage (%), 2015-2021



*once every three months or less

Source: ENDUTIH (2021) • Created with Datawrapper

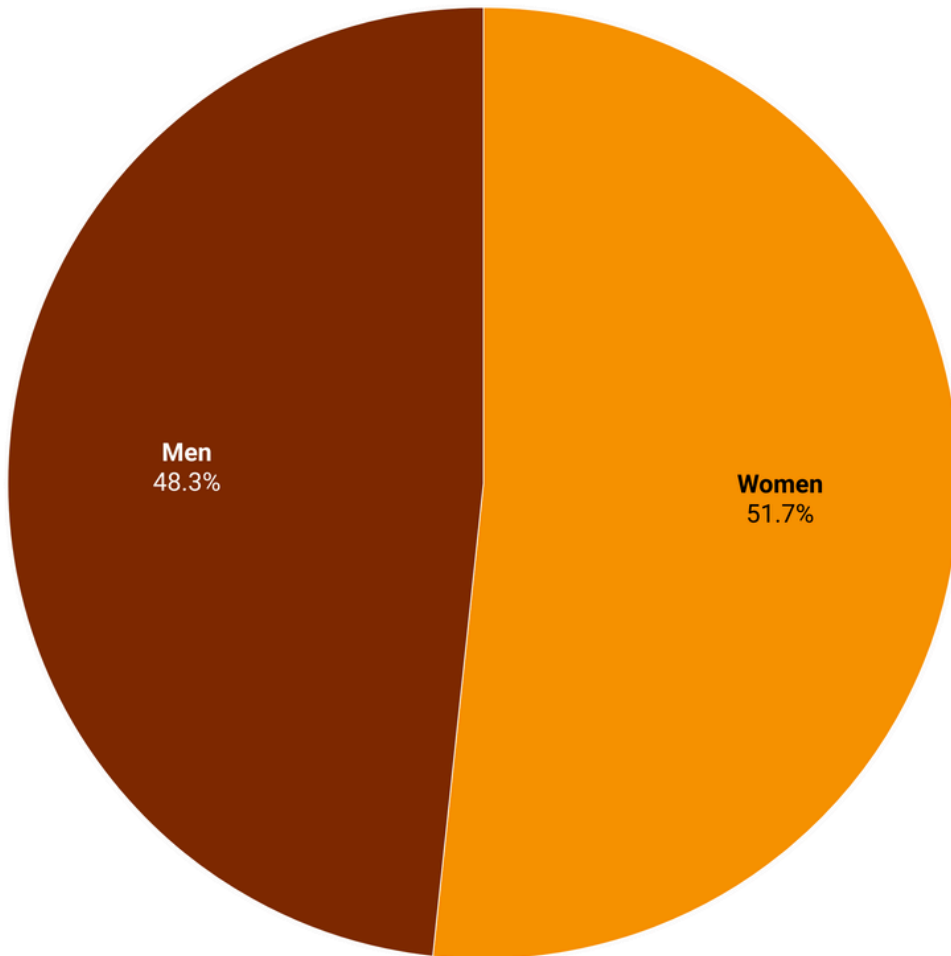
In terms of age groups, people aged 25 to 34 use the internet the most, accounting for 18.9% of the total usage in 2021. Since 2015, the gap between this age group and the other age groups has widened. In 2021, 15.9% of internet usage was accounted for by the 35 to 44 age group, and 15.6% by the 18 to 24 age group. The age groups that use the internet the least are children between 6 and 11 years old (10.8%) and those over 55 (11.3%). Women use the internet 4% more than men in Mexico.

Percentage of internet usage, breakdown by age groups, %, 2015-2021

	6-11 yrs	12-17 yrs	18-24 yrs	25-34 yrs	35-44 yrs	45-54 yrs	55 + yrs
2015	12	19	20	20	15	9	5
2016	11	19	19	20	16	10	6
2017	10	18	18	20	17	11	7
2018	10	16	18	20	16	12	8
2019	10	15	16	19	17	13	10
2020	11	15	16	19	16	13	10
2021	11	15	16	19	16	13	11

Source: ENDUTIH (2021) • Created with Datawrapper

Internet usage by gender, %, 2021

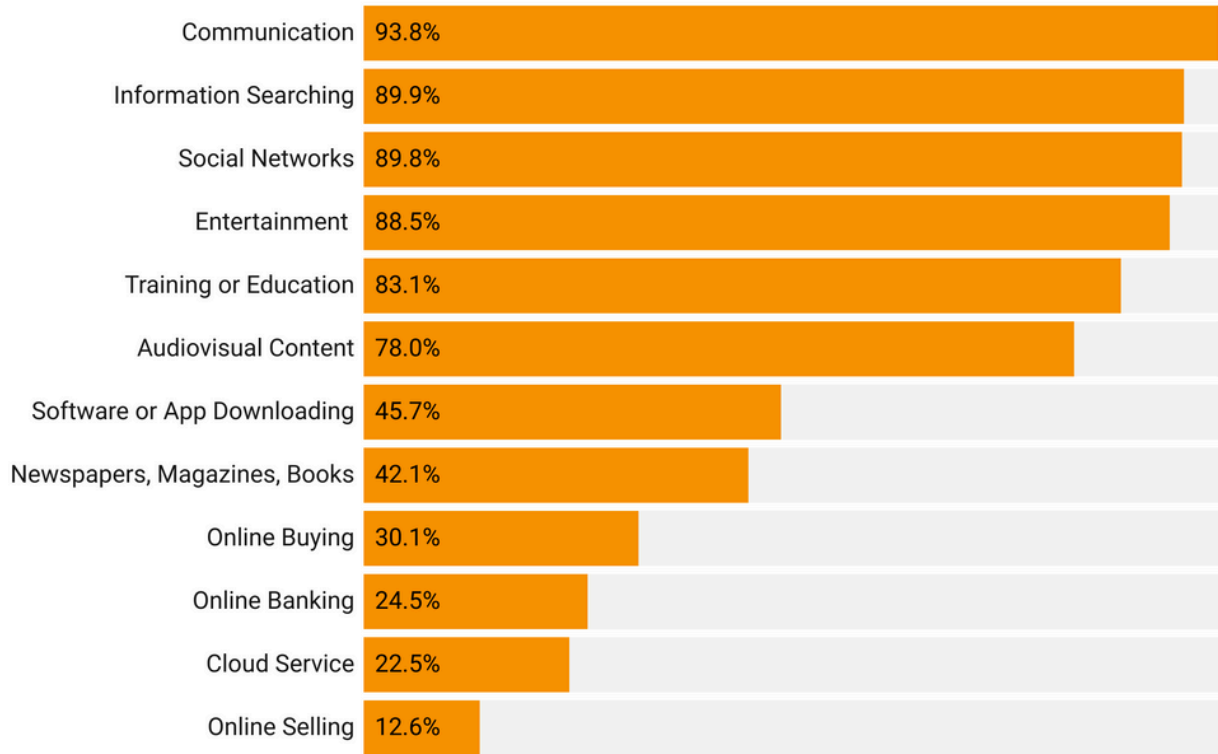


Source: ENDUTIH (2021) • Created with Datawrapper

The main reasons for Mexican users to access the internet are communication (93.8%), with social networks being the most popular at 89.8%, search for information for 89.9% of users, and entertainment for 88.5% of users (including 78% for accessing audiovisual content and 42.1% for reading newspapers, magazines, and books). People in Mexico also use the internet for training and education purposes, downloading programs and applications, and cloud services. Online buying accounts for 30.1% of the internet usage.



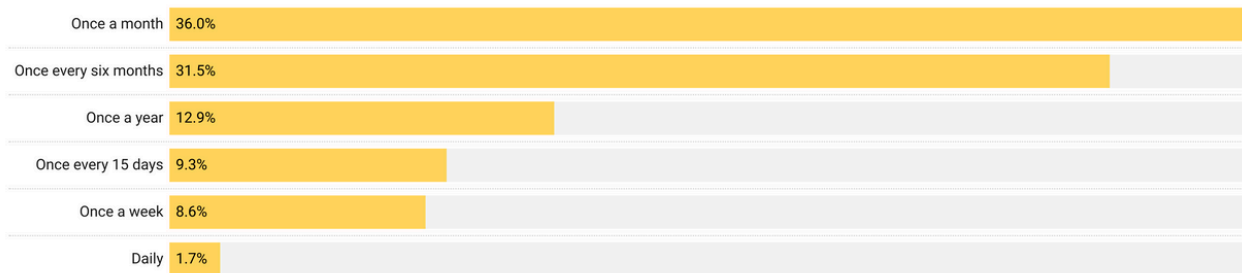
Reasons for internet usage, %, 2021



Source: ENDUTIH (2021) • Created with Datawrapper

Regarding the frequency of online shopping, the majority of people make online purchases once a month, followed by once every six months and once a year.

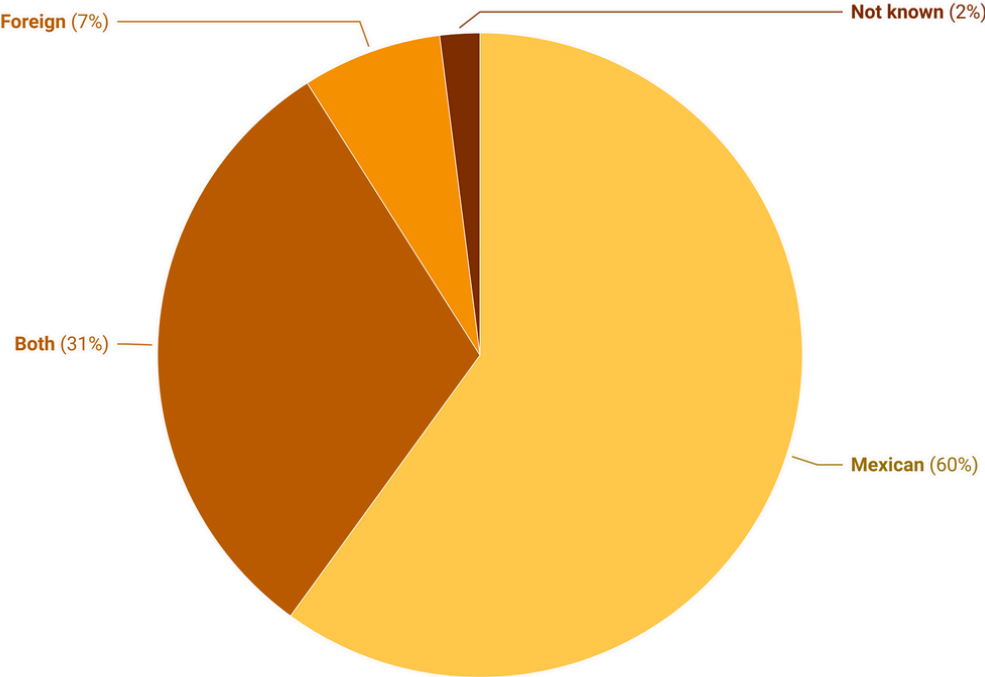
Frequency of online shopping, %, 2021



Source: ENDUTIH (2021) • Created with Datawrapper

Some 60% of people in Mexico make their online purchases from national companies, 8% from foreign companies, and 30% from both.

Origin of the online shopping websites, %, 2021

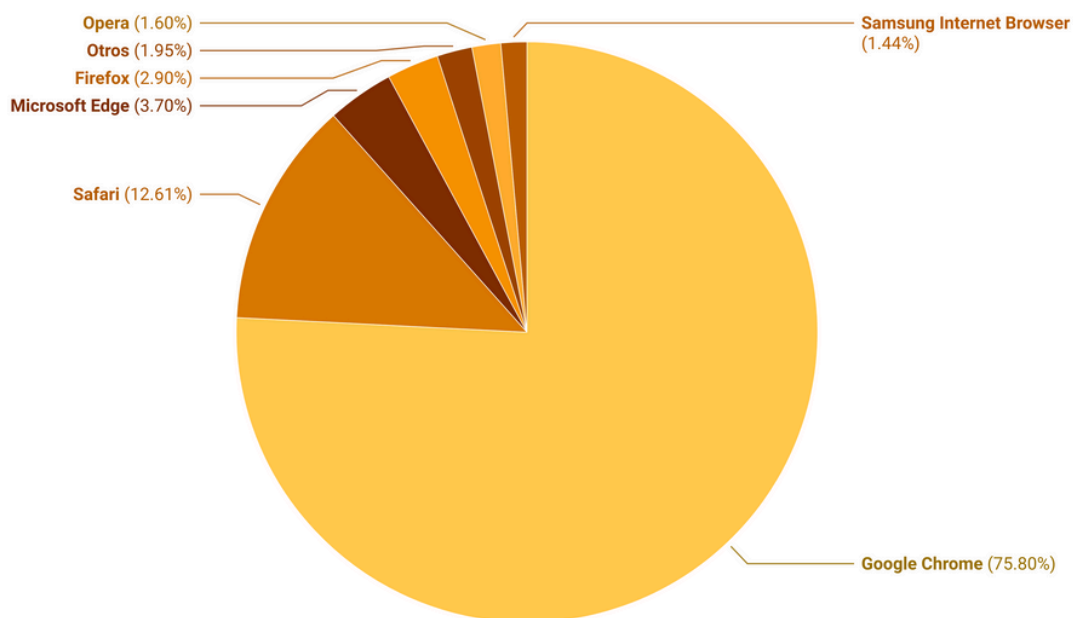


Source: ENDUTIH (2021) • Created with Datawrapper

Digital Platforms

In January 2022, according to data from StatCounter, a web traffic analysis firm, the internet browser with the largest market share in Mexico was Google Chrome with 75.8%. In a distant second place came Apple’s Safari with 12.6%, followed by Microsoft Edge with 3.7%.

Internet browser market share, %, 2022

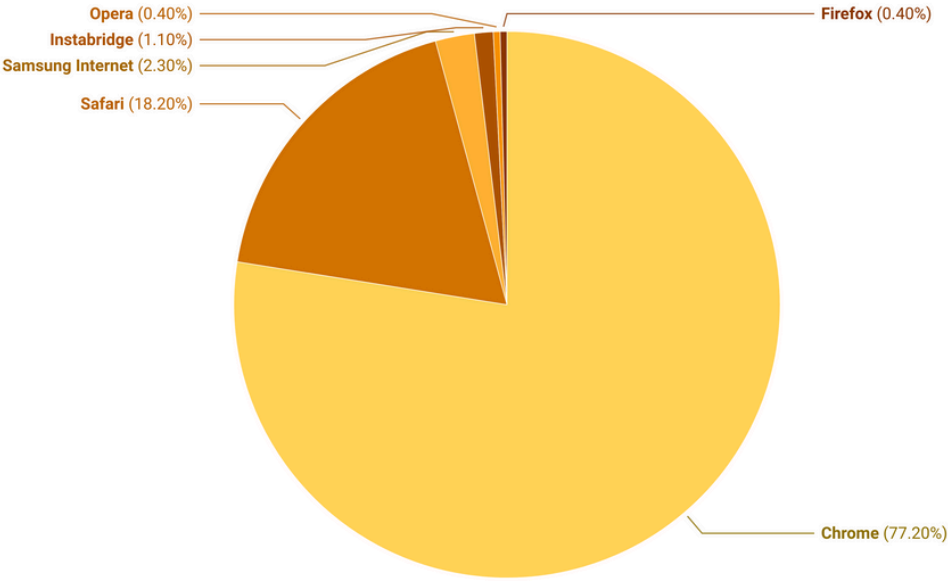


Source: StatCounter (2022a) • Created with Datawrapper

StatCounter (2022a). "Browser Market Share in Mexico". July 2022. <https://gs.statcounter.com/browser-market-share/all/mexico/#monthly-202101-202201>

Among the mobile phone browsers, Alphabet’s Chrome also has the largest market share in Mexico (77.2%), Apple’s Safari has a share of 18%, and Samsung Internet has 2.29%.

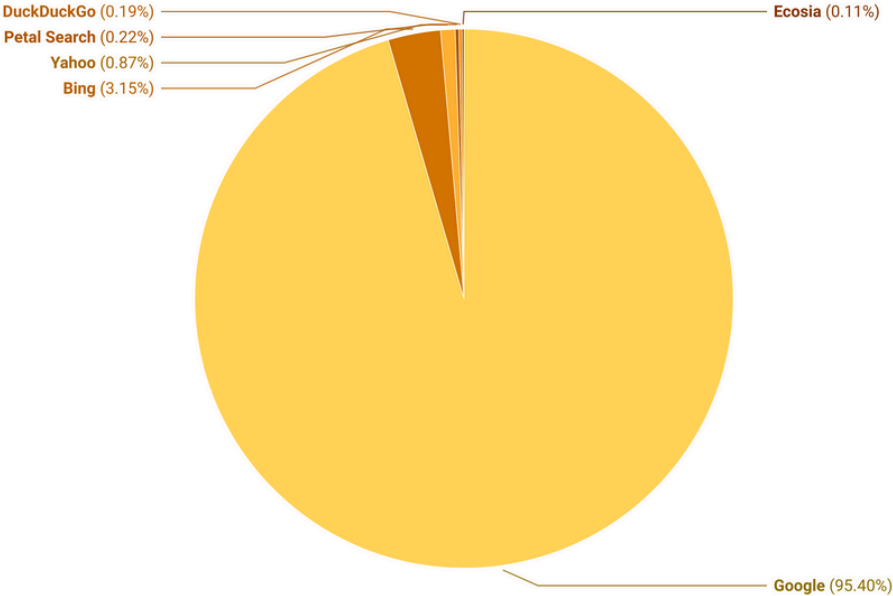
Mobile phone browser market share, %, 2022



Source: StatCounter (2022b) • Created with Datawrapper
 StatCounter (2022b). "Mobile Browser Market Share in Mexico". July 2022. <https://gs.statcounter.com/browser-market-share/mobile/mexico>

Alphabet-owned Google dominates the computer search engine market with 95.40%, followed far behind by Microsoft’s Bing with 3.15% and Yahoo with 0.87%.

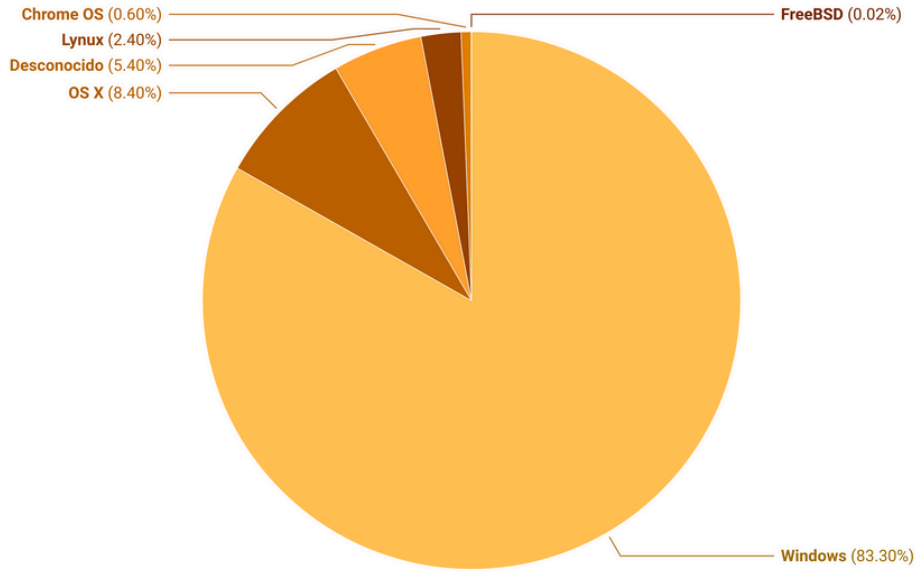
Search engine market share, %, 2021



Source: StatCounter (2021) • Created with Datawrapper
 StatCounter (2021). "Search Engine Market Share in Mexico". July 2021. <https://gs.statcounter.com/search-engine-market-share/all/mexico>

Regarding computer operating systems, Microsoft’s Windows has an 83% market share, followed by Apple’s OS X with 8.37% and the open-source software Linux with 2.36%.

Computer operating system market share, %, 2022

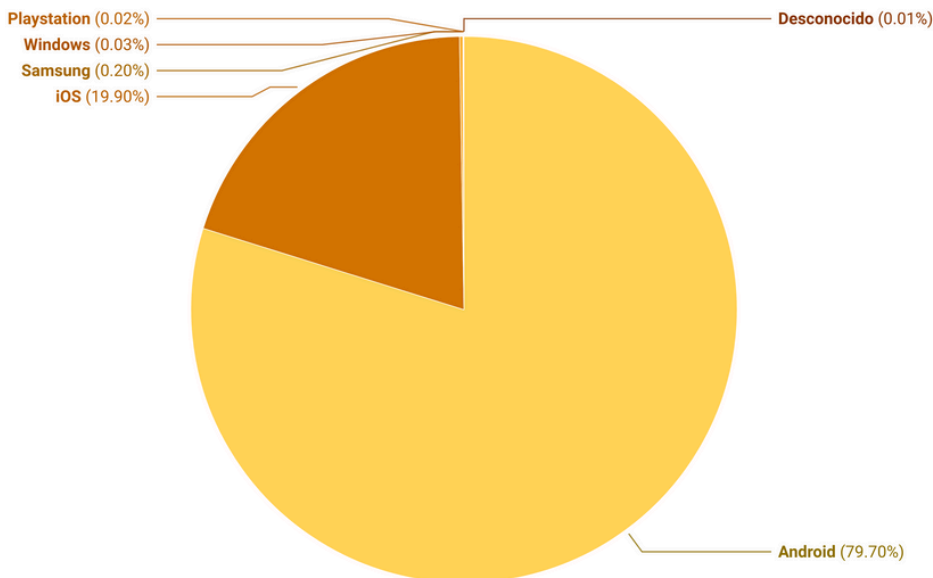


Source: StatCounter (2022c) • Created with Datawrapper

StatCounter (2022c). "Desktop Operating System Market Share in Mexico". July 2022. <https://gs.statcounter.com/os-market-share/desktop/mexico>

The most used mobile operating system in Mexico is Android owned by Alphabet with a market share of almost 80%, followed by Apple’s iOS with around 20%.

Mobile operating system market share, %, 2022

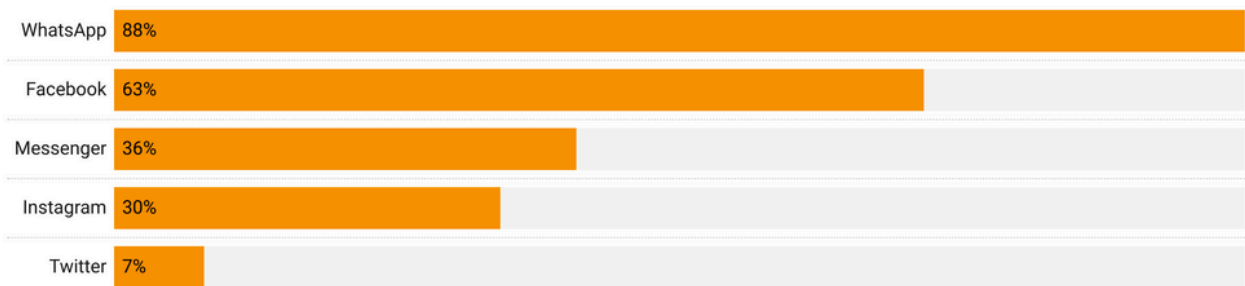


Source: StatCounter (2022d) • Created with Datawrapper

StatCounter (2022d). "Mobile Operating System Market Share in Mexico". July 2022. <https://gs.statcounter.com/os-market-share/mobile/mexico>

According to the National Survey of Audiovisual Content Consumption 2020-2021 conducted by the IFT, when it comes to instant messaging services and social networks, 88% of the Mexican users access WhatsApp, 63% use Facebook, 36% use Messenger and 30% use Instagram (all four applications owned by Meta).

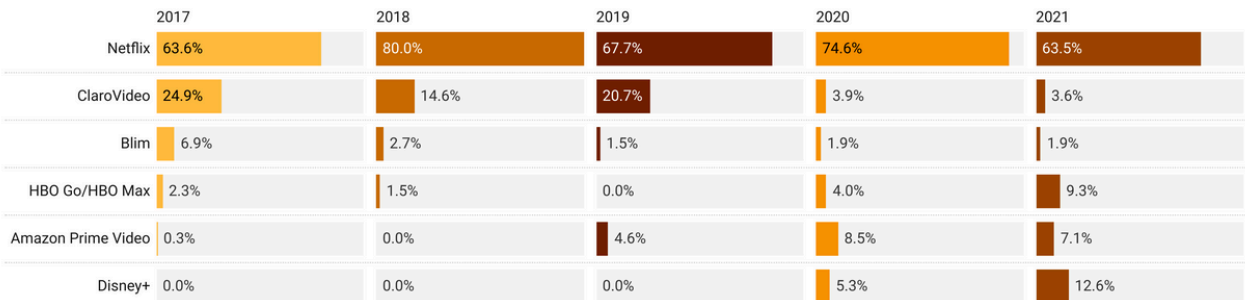
Instant messaging and social networking usage, %, 2020-2021



Source: ENCCA (2021) • Created with Datawrapper

Among the paid streaming platforms, Netflix reached a market share of 63.5% in 2021, followed by Disney+ with 12.6%, HBO Max with 9.3%, Amazon Prime Video with 7.1%, ClaroVideo of América Móvil with 3.6%, and Blim of Televisa with 1.9%, according to data from The Competitive Intelligence Unit, a private consultancy. Historical data shows the continued dominance of Netflix, despite a decrease of its 80% market share in 2018. It also reveals a decrease in the market shares of national platforms as a result of the entry of Disney+ and HBO Max on the Mexican market.

Streaming platform market share, %, 2017-2021



Source: Camargo (2017, 2018 y 2021); Saldaña (2022) • Created with Datawrapper

See Camargo, R. (2017). "Competencia de contenidos de video bajo demanda por suscripción (SVOD)." The Competitive Intelligence Unit. 11 August. <https://www.theciu.com/publicaciones-2/2017/8/20/competencia-en-contenidos-de-video-bajo-demanda-por-suscripcin-svod>
 Camargo, R. (2018). "Ecosistema competitivo de plataformas de video bajo demanda por suscripción." The Competitive Intelligence Unit. 17 December. <https://www.theciu.com/publicaciones-2/2018/12/17/dinmica-de-suscripciones-de-servicios-de-televisin-y-audio-restringidos-1>
 Camargo, R. (2021). "La Guerra del Streaming: Nuevos Jugadores y Adopción Acelerada". The Competitive Intelligence Unit. 12 April. <https://www.theciu.com/publicaciones-2/2021/4/12/a-guerra-del-streaming-nuevos-jugadores-y-adopcin-acelerada>

Revenues

According to the Global Entertainment and Media Outlook reports published by PwC, a privately owned accounting firm, the Mexican digital media market is forecast to experience significant growth in the coming years. The internet access sector is leading, with estimated revenues of US\$ 9.951bn in 2022. Internet advertising has also skyrocketed due to the pandemic, surpassing television advertising and reaching US\$ 3.913bn the same year.

Revenues of entertainment and digital media, US\$ m, 2020-2022



Source: PwC (2021, 2022) • Created with Datawrapper



Main Market Players

The telecommunications market in Mexico is highly concentrated. In 2014, the Federal Telecommunications Institute (IFT) designated América Móvil as a dominant economic agent (AEP), a company with a dominant position in the telecommunications market and took a string of asymmetric measures to balance the market[314]. Those measures have achieved a progressive decrease of the Herfindahl-Hirschman concentration index (HHI).

Herfindahl Hirschman (HHI) Concentration Index in telecommunications services, 2013-2021

	Fixed lines	Fixed internet	Pay TV	Mobile lines	Mobile internet
2013	5,089	5,282	3,936	5,229	6,789
2014	4,762	4,649	4,444	5,084	5,848
2015	4,307	4,224	4,593	5,227	5,389
2016	4,216	4,027	4,507	4,873	5,446
2017	4,055	3,763	5,002	4,759	5,375
2018	3,867	3,540	5,033	4,576	5,381
2019	3,559	3,396	5,239	4,558	5,292
2020	3,140	3,044	5,035	4,549	5,411
2021	2,924	2,810	4,451	4,602	5,380

Source: authors' own calculation based on IFT data (2023) • Created with Datawrapper

[314] Gómez, R. (2020). A seis años de la Ley Federal de Telecomunicaciones y Radiodifusión, *cit.*

Three companies jointly command over 97% of the Mexican mobile phone market, creating an oligopoly. The two companies that compete with América Móvil on this market are both foreign owned: AT&T is American owned and Telefónica is backed by Spanish capital. The fixed internet market is different, all of the five competing companies being domestically owned. The fixed internet market registers the lowest concentration and has experienced a significant decrease in the IHH, down by 2,472 points between 2013 and 2021, a result of the asymmetrical measures imposed by the Mexican telecom regulator.

One of the reasons for this situation is that those companies offer triple play packages consisting of telephone, internet and paid television. Grupo Televisa offers quadruple play packages, which include mobile telephony. Meanwhile, América Móvil is barred from offering open and pay-TV services. On the pay-TV market, Grupo Televisa increased its power to such an extent that in 2020, the IFT designated the company as a player with an oversized market influence. Televisa had a share of 70.2% of the pay-TV subscribers in 2019.

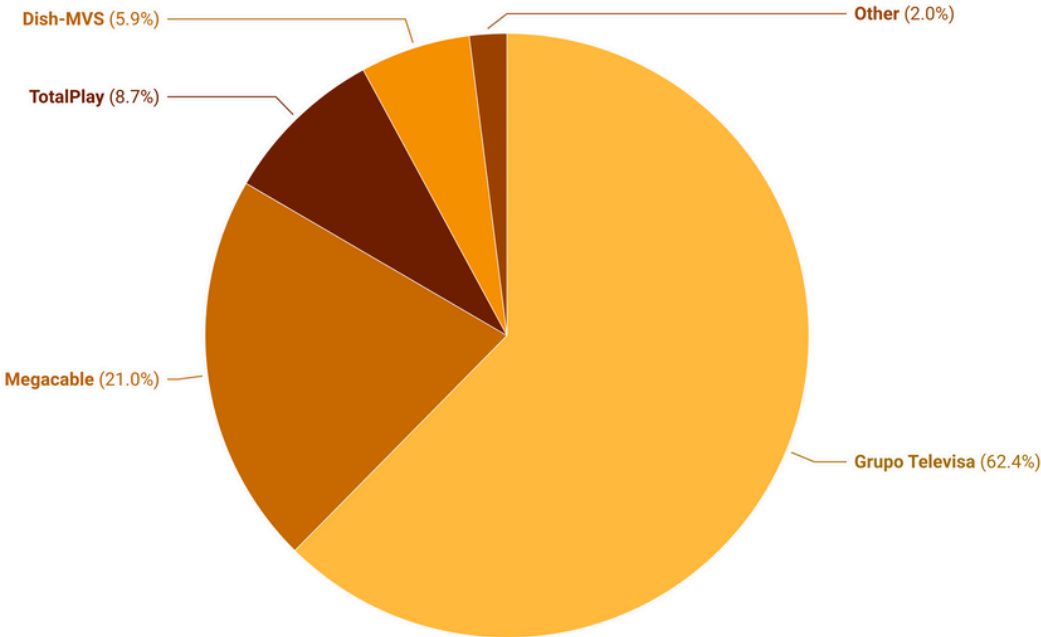
Following the IFT's ruling, Grupo Televisa filed an appeal with a specialized telecommunications court and won. As a result, the substantial market power designation was dropped, the court arguing that the IFT's decision lacked up-to-date market information and failed to take into account the competition of pay-TV with streaming platforms[315].

According to the latest information about the pay-TV services in Mexico provided by the IFT in its 2022 report, Grupo Televisa concentrates 62.4% of the market, followed by Megacable with 21%, TotalPlay with 8.7%, Dish-MVS with 5.8%, Stargroup with 1.1%, and others with the remaining 0.83%.



[315] Ana Luiza Gutiérrez, "IFT quiere demostrar que Televisa tiene 'poder sustancial' en televisión de paga" (The IFT wants to show that Televisa has 'substantial power' in the pay television market), *Expansión*, 5 December 2022, available online at <https://expansion.mx/empresas/2022/12/05/ift-quiere-demostrar-que-televisa-tiene-poder-sustancial-en-televisión-de-paga>

Main players on the Pay-TV market, market share as %, Mexico, 2021



Source: authors' own calculation based on IFT data (2023) · Created with Datawrapper

While fixed telecommunications services are mostly offered by companies with Mexican capital[316], the main players on the mobile telecommunications market, AT&T and Telefónica, are based outside the country. The reason for this may be the different potential and dynamic of the mobile market compared to the fixed market, as well as the different requirements for investment and infrastructure deployment between the two services.

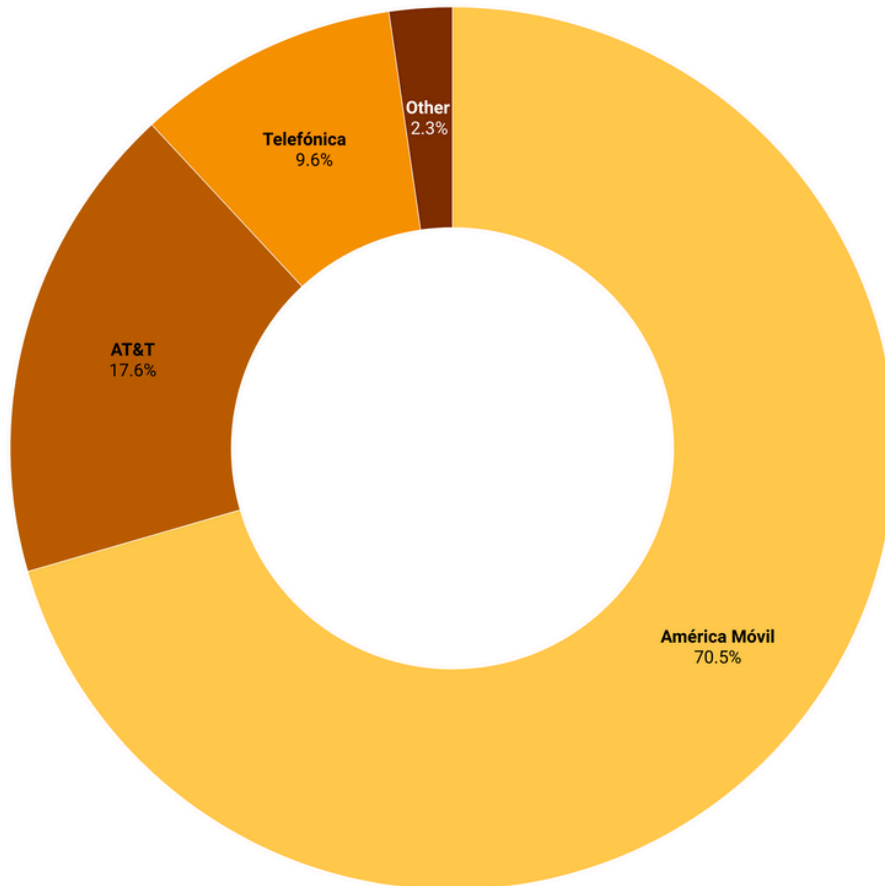
AT&T entered the Mexican mobile phone market in 2015. It has since grown into the main competitor for América Móvil, displacing Telefónica as the second largest player on that market. One positive aspect of AT&T's entry on the Mexican market was the elimination of the roaming charges between Mexico and the U.S., a strategic decision prompted by the market potential presented by the large community of Mexican migrants living in the U.S. This initiative prompted competitors throughout North America to follow suit[317].

[316] In the satellite television market, the two leading companies are Sky and Dish-MVS. Sky is co-owned by Grupo Televisa (58.7%) and AT&T (41.3%). Dish-MVS was co-owned by Grupo MVS and US-controlled EchoStar until 2022 when MVS became the full owner of the company

[317] Gómez, R. (2020). A seis años de la Ley Federal de Telecomunicaciones y Radiodifusión, *cit.*

The mobile phone market allows the entry of several players as they are legally allowed to use the infrastructure deployed by dominant operators. Hence, there is a large number of companies that offer such services as Over The Top (OTT). However, together they barely account for 2.3% of the market.

Main players on the mobile phone market, market share as %, 2021

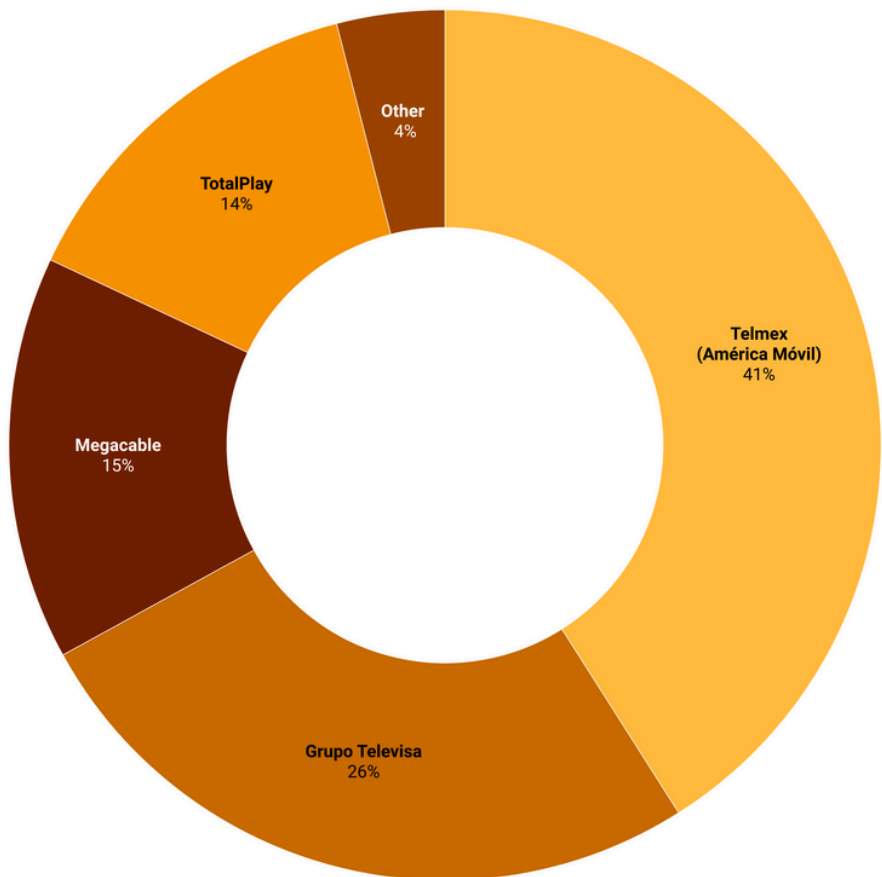


Source: authors' own calculation based on IFT data (2023) • Created with Datawrapper

The five largest companies competing in the Mexican fixed internet market are América Móvil, Grupo Televisa, Megacable, TotalPlay, and IST. Two key developments have shaped this market in recent years. One was the growth of Grupo Televisa through the acquisition of various cable companies in the last ten years[318], which was accompanied by a slew of investments in infrastructure. The second was the growth of TotalPlay in the last five years. The company reached a market share of nearly 15%. The four largest players control some 96% of the fixed internet market in Mexico.

[318] For a detailed context on the acquisition and concentration process at Grupo Televisa in pay-TV, fixed internet and telephony services, see: Gómez, R. (2017). Grupo Televisa in Birkinbine, Gomez & Wasko (eds.) Global Media Giants. Routledge, and Gómez, R. (2020). A seis años de la Ley Federal de Telecomunicaciones y Radiodifusión. Análisis y propuestas. Tintable/Amedi.

Main players on the fixed internet market, market share as %, 2021



Source: authors' own calculation based on IFT data (2023) • Created with Datawrapper

Income of fixed data telecommunications companies (MXN m), 2014-2021

Company	2014	2015	2016	2017	2018	2019	2020	2021
Telmex	20,572	39,995	41,255	54,254	n/a	37,161	55,316	41,989
Televisa	4,911	7,617	9,709	11,357	13,044	14,544	16,54	18,648
Megacable	2,526	3,500	4,466	5,146	6,079	6,622	7,206	8,225
Totalplay	0.2	600	1,923	2,74	3,862	4,977	7,101	10,322
Axtel[319]	1,337	1,482	n/a	n/a	n/a	n/a	n/a	n/a

n/a: not available

Source: authors' own calculation based on data from the IFT - Telecommunications Information Bank (BIT), see <https://bit.ift.org.mx/BitWebApp/> • Created with Datawrapper

[319]Axtel sold part of its shares in the fiber optic business for triple play services in the north of the country to Grupo Televisa in 2018, and its remaining fiber optic assets in the south of the country to Megacable in May 2019.

Income of mobile data telecommunications companies (MXN m), 2014-2021

Company	2014	2015	2016	2017	2018	2019	2020	2021
América M	185,131	191,751	187,127	190,022	207,610	226,164	214,578	225,219
AT&T[320] MX	n/a	n/a	8,742	14,477	22,441	19,365	19,605	55,696
Telefónica MX	33,240	32,683	30,053	29,497	28,514	28,593	25,822	24,176
Unefon	5,933	1,396	n/a	n/a	n/a	n/a	n/a	n/a
Iusacell (Televisa/Grupo Salinas)	13,022	12,718	n/a	n/a	n/a	n/a	n/a	n/a
Nextel	18,267	13,596	n/a	n/a	n/a	n/a	n/a	n/a
OTT[321]	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

n/a: not available

Source: authors' own calculation based on data from the IFT - Telecommunications Information Bank (BIT) <https://bit.ift.org.mx/BitWebApp/> · Created with Datawrapper

Telmex/América Móvil

Telmex/América Móvil is a domestically owned private company that was previously state controlled. In 1990, the company's assets and shares were offered for sale in a tender by the government of Carlos Salinas de Gortari (1988-1994). The businessman Carlos Slim Helú, through Carso Group and with investment partners such as France Telecom and SBC Telecom, won the bid. As part of the privatization conditions, the company was protected to operate as a monopoly for the first five years to strengthen its market position and be able to better compete. As part of the privatization deal, the company had several obligations, too, including: a) to increase the number of fixed lines by at least 12% each year between 1990 and 1994; b) to improve the quality of service and maintenance; c) to expand telephone services in rural areas; and d) to install five public telephones for every 1,000 inhabitants[322]. The company was also prohibited to offer pay-TV and broadcasting services[323].

[320] In 2015, AT&T entered the Mexican market through the purchase of Iusacell, Unefon and Nextel. As a result, concentration on the mobile phone market increased, only three large players being left to compete.

[321] In Mexico, according to the IFT directory, there are more than 90 Mobile Virtual Network Operators (MVNO) known also as Over The Top (OTT) operators.

[322] For a deeper analysis of the history of the company and its corporate evolution from a political economy approach, see: Sosa, G. (2017). América Móvil in Birkinbine, Gómez and Wasko (eds.) Global Media Giants. NY: Routledge.

[323] At the time of writing this report, this clause was still active, Telmex not being able to offer pay-TV or broadcasting services in Mexico.

The company was initially given a license to operate until 2026. In 2016, the Federal Telecommunications Institute (IFT) approved at Telmex’s request an extension of the company’s license by another 30 years, that is until 2056.

Today the corporation operates as América Móvil, offering fixed and mobile telecommunications services in 23 countries across America and Europe. It is part of the Carso Group, which owns a bevy of companies ranging from department stores and restaurants to builders of oil platforms. The company owns five satellites, 47,000 kilometers of undersea cable, and one million kilometers of optic fiber cable. Its most well-known companies in the sector include América Móvil, Claro, Claro Enterprise Solutions, Telmex, Embratel, and Telekom Austria Group. The majority shareholder in the company is Carlos Slim Helú.

Grupo Televisa

Televisa Group is a Mexican broadcasting and telecommunications company that was the most prominent Spanish-language content producer in Latin America during the second half of the 20th century. Its primary business was in broadcasting where it owned three nationwide chains (Channels 2, 5, and 9) and a regional television channel (Channel 4). From 1973 to 1993, it held a monopoly being the sole privately run company that provided free-to-air television nationwide. The company’s coziness with the governments of the Institutional Revolutionary Party (PRI) allowed it to thrive by controlling a growing amount of television advertising revenues. However, the company’s news programs served the PRI’s political interests. Thanks to its dominant position, Televisa controlled the national news agenda in Mexico and shaped the television content diet consumed by Mexican audiences for a significant portion of the 20th century, which enabled Televisa to amass significant influence and political power in the country[324].

In the early 2000s, the company began to invest significant funds in various pay-TV services. These investments helped the company seize the benefits of digital convergence and reposition itself as a telecommunications operator. Currently, the flagship telecommunications company in the group is IZZI, which offers fixed telephony and internet services, pay-TV content, mobile telephony, and internet connection services (as an MVNO). Additionally, the group also sells pay-TV services through its satellite company SKY, in which AT&T is its main partner[325].

[324] To find out more about the history and profile of Grupo Televisa see: Gómez, R. (2017). Grupo Televisa in Birkinbine, Gómez and Wasko (eds.) Global Media Giants. NY: Routledge.

[325] Grupo Televisa owns 58.1% of the shares in SKY and AT&T México holds the remaining stake.

These two companies, IZZI and SKY, together generate most of Televisa Group's revenues. In 2022, anticipating sharp competition from video streaming platforms, Televisa merged its content and broadcasting division with its main partner in the United States, the leading Spanish-language television network Univision. They formed a new joint company specialized in the production and distribution of Spanish-language content called Televisa-Univision Inc.. The main objective of their joint streaming platform, VIX+, was to capitalize on the potential access to all Spanish-speaking audiences (some 100 million people) by operating in both Mexico and the U.S.[326].

TotalPlay

TotalPlay is a fixed telecommunications services company that belongs to the Salinas Group, which also owns TV Azteca, which is the second largest free-to-air television broadcaster, Elektra Group, and Banco Azteca. Salinas Group, through its company Azteca Comunicaciones Colombia, also offers various telecommunications services in Colombia.

Operating since 2011, TotalPlay offers broadband internet, paid HD television, and interactive television through the company's fiber-to-the-home (FTTH) network. In the period 2015–2020, TotalPlay experienced the highest growth rate, an annual increase of 40%, among the companies offering fixed telecommunications services in the Mexican market.

Megacable

Megacable is a Mexican-owned cable operator and provider of phone and internet services that was founded in 1982 in the northwest part of the country (the states of Sinaloa and Sonora). The company started in the cable television business and has since expanded its network to include cities in the northwest of the country while also acquiring local and regional cable companies. By now, the company has extended its network from north to south in all 32 Mexican states. It is the fourth largest fixed telecommunications service provider nationwide. Since 2014, it has owned 80% of the shares in the Television Producer and Distributor (PCTV), a company specialized in the production and distribution of pay-TV content. Additionally, Megacable offers a streaming platform called X View and provides mobile telephony through a MVNO under the brand Megamóvil.

[326] Grupo Televisa is the majority shareholder of the new company with 45% of the shares.

Telefónica México

The Spanish company started its operations in Mexico in 2001. Now, the company operates under the brand Movistar, primarily offering mobile telephony and internet services. It is the third-largest telecommunications company in terms of mobile lines. In recent years, as part of the company's strategy in Latin America, Movistar has made significant moves to strengthen its position in the Mexican market and to continue competing with América Móvil. In 2019, in order to improve its financial situation, Movistar gave up the spectrum it had previously acquired and paid for, and opted for a new policy of sharing and leasing infrastructure from AT&T Mexico.

AT&T México

The U.S.-owned AT&T launched its mobile telecommunications operations in Mexico in early 2015 after it took over the assets of three mobile phone providers: Unefon, Iusacell, and Nextel. The corporation's entry to the Mexican market was one of its several business expansion steps including the acquisition of DirecTV in 2014, and of Warner Media two years later. AT&T Mexico is investing significantly in the deployment of 5G infrastructure on the mobile phone and internet market, with the aim of further gaining market share from América Móvil in an attempt to take advantage of the asymmetrical measures imposed on the Mexican giant by authorities.



Technology and Government

The Mexican government does not prioritize the promotion of public policies related to new information and communication technologies. In fact, two major initiatives to achieve universal internet access, the shared network and the backbone network, have not yet been completed. Similarly, both the Chamber of Deputies and the Senate have failed to approve initiatives related to the digital agenda. Mexico also lacks a comprehensive regulatory framework for the internet due to the absence of a specialized agency. The roles of the IFT and the Federal Commission of Economic Competition (Cofece) in the regulation of tech platforms and social media are therefore uncertain.

Broadband Rollout

The rollout of fixed telecommunications infrastructure in rural areas is significantly delayed. According to data from the IFT, in Q4 2022, out of a total of 1,893 municipalities, a total of 729 did not have access to fiber optic. This shows that private and public investment in expanding fiber optic coverage is still insufficient. On the other hand, there is a lack of competition in most municipalities, many of them still having only one provider. Experts estimated that the national fiber optic coverage stood at less than 30% in 2022 in spite of a yearly growth of some 25%^[327]. According to the IFT, only 40% of fixed internet connections are fiber optic, the remainder of 60% being accounted for by coaxial cable or DSL.

To tackle these digital gaps in the years ahead, steady upgrade and expansion of the fiber optic infrastructure are needed. That would spur investments from both public and private sources. The private investments in the sector reached around MXN 107.7bn in 2020, 10% higher than in the previous year. The public investment in expanding the coverage of the internet national network reached MXN 15.57bn in 2020. It was made through the state-owned company CFE Telecommunications.

[327] Jorge Bravo, "Inversión y toma de control de las telecomunicaciones" (Investment and takeover of telecommunications), *Proceso*, 9 June 2022, available online at <https://dplnews.com/inversion-y-toma-de-control-en-telecomunicaciones/>.

Tech Giants and Tax Regulation

Following the entry of the global digital platforms into the Mexican market an inequitable fiscal system was created as the country lacks an updated legal framework to address the issue of extraterritoriality of digital services, which is an obstacle to collecting taxes from those foreign players. This situation has affected local companies as they continued to pay taxes while foreign players did not, leading to a significant market distortion.

The current legislation in Mexico considers that corporate income tax should be collected where the source of production is located and where the company's headquarters are, not where the consumers live. As a result, since many digital platforms are established in other countries, although their consumers reside in Mexico, their income is not subject to taxation. However, digital platforms use personal data of consumers to generate profits, which means that a share of the production actually occurs where the users reside, even if that location does not coincide with the company's headquarters[328].

This issue was addressed at international level in an OECD report in 2015, which proposed among other things to challenge the "source rules"[329]. The report highlighted the need to design effective and transparent international standards on taxes that alter the definitions of the "permanent establishment requirement" for companies to identify their tax collection locations. The OECD also proposed tackling the challenge of "indirect taxation," which refers to the possibility for a state to tax income earned by companies that do not have a physical presence in that country and are not taxed elsewhere, thus avoiding double taxation. In 2020, the OECD proposed new rules regarding the location where tax on digital services and for multinational companies in general should be paid, including both in-person and remote activities. Those rules, according to the OECD, would be implemented through a global minimum tax as part of a Global Tax System. The G7 and G20 meetings in 2021 made progress in agreeing on technical and political issues regarding such a system, including a threshold of 20% for a tax on residual profit exceeding 10% for the largest and most profitable multinational companies, as well as the establishment of a minimum global tax of at least 15%[330].

[328] Jack M. Mintz, "Jack Mintz: Would the Liberals dare entertain a 'Netflix tax' before an election?", *Financial Post*, 22 January 2019, available online at <https://business.financialpost.com/opinion/jack-mintz-would-the-liberals-dare-entertain-a-netflix-tax-before-an-election>.

[329] OECD, Addressing the Tax Challenges of the Digital Economy, Action 1 - 2015 Final Report, 5 October 2015, available online at <https://www.oecd.org/ctp/addressing-the-tax-challenges-of-the-digital-economy-action-1-2015-final-report-9789264241046-en.htm>.

[330] Talía Díaz, "Acercándonos a la solución a los desafíos fiscales de la globalización y digitalización de la economía: el camino a un Sistema Tributario Global" (Approaching the solution to the tax challenges of globalization and digitization of the economy: the path to a Global Tax System), *Enfoque Derecho* [blog], 25 June 2021, available online at <https://www.enfoquederecho.com/2021/06/25/acercandonos-a-la-solucion-a-los-desafios-fiscales-de-la-globalizacion-y-digitalizacion-de-la-economia-el-camino-a-un-sistema-tributario-global/>; "Histórico acuerdo en G-20 sobre tasa mínima reducirá evasión fiscal: Arturo Herrera" (Historical G-20 agreement on minimum rate will reduce tax evasion: Arturo Herrera), *Aristegui Noticias*, 10 July 2021, available online at <https://aristeginoticias.com/1007/dinero-y-economia/historico-acuerdo-en-g-20-sobre-tasa-minima-reducira-evasion-fiscal-arturo-herrera-video/>.

Since 2018, Mexico has witnessed a heated debate sparked by those in favor of taxing foreign platforms: local companies that compete with them and certain lawmakers who echoed those demands[331], including the Union of Telephone Operators of the Mexican Republic (STRM), which argues that foreign platforms use the Mexican telecommunications infrastructure without investing in or compensating the country[332].

Organizations opposed to such taxing proposals include the National Chamber of the Electronics Industry (Canieti), the Association of Internet.mx, the Latin American Internet Association (ALAI), to which Google and Mercado Libre belong, among others, and the Network for the Defense of Digital Rights. Among other things, they consider that the oversight of internet platforms is not compatible with the right to “universal access” to the internet, confusing the debate about the right to universal access to internet infrastructure services with commercial services that use the internet to reach their consumers. Those organizations oppose blocking of platforms that fail to pay taxes, considering such a decision to be unconstitutional. They also made proposals to cut down on taxes or postpone the implementation of the law[333].

The first bill covering these issues was presented to Congress in 2018 by the Party of the Democratic Revolution. The bill requires foreign companies to establish a permanent presence in Mexico to be able to operate. The bill was turned down, lawmakers arguing that it would run against agreements that Mexico was committing to in the process of renegotiation of NAFTA[334].

In 2019, a couple more bills were put forward, one by the Morena parliamentary group and the other by the Ministry of Finance[335].



[331] Irene Levy, “¿En qué se parecen Uber, Netflix y Roku?” (How are Uber, Netflix and Roku alike?), *El Universal*, 22 October 2018. <https://www.eluniversal.com.mx/columna/irene-levy/cartera/en-que-se-parecen-uber-netflix-y-roku>

[332] Antonio Cahun, “Impuestos para Uber, Netflix y otras plataformas digitales en México: la demanda bajaría en 2020 por el posible aumento de precios” (Taxes for Uber, Netflix and other digital platforms in Mexico: demand would drop in 2020 due to the possible price increase), *Xataka*, 23 December 2019, available online at <https://www.xataka.com.mx/legislacion-y-derechos/impuestos-para-uber-netflix-otras-plataformas-digitales-mexico-demanda-bajaria-2020-posible-aumento-precios>.

[333] Steve Saldaña, “Inconstitucional y técnicamente inviable será el veto a servicios digitales que no paguen IVA en México, asegura la ALAI” (The veto of digital services that do not pay VAT in Mexico will be unconstitutional and technically unfeasible, says ALAI), *Xataka*, 30 October 2020. <https://www.xataka.com.mx/legislacion-y-derechos/inconstitucional-tecnicamente-inviable-sera-veto-a-servicios-digitales-que-no-paguen-iva-mexico-asegura-alai>.

[334] Salinas, J. (2017). Iniciativa que expide la ley del impuesto sobre los ingresos procedentes de servicios digitales, suscrita por integrantes del grupo parlamentario del PRD. http://sil.gobernacion.gob.mx/Archivos/Documentos/2018/09/asun_3734291_20180913_1536243462.pdf; T-MEC (2020). Textos finales del Tratado entre México, Estados Unidos y Canadá (T-MEC). Junio 3. <https://www.gob.mx/t-mec/acciones-y-programas/textos-finales-del-tratado-entre-mexico-estados-unidos-y-canada-t-mec-202730?state=published>

[335] Ramírez Cuellar, A. (2019). Que Reforma y Adiciona Diversas Disposiciones de La Ley del Impuesto Al Valor Agregado y del Código Fiscal De La Federación, a Cargo del Diputado Alfonso Ramírez Cuéllar, del Grupo Parlamentario De Morena. http://sil.gobernacion.gob.mx/Archivos/Documentos/2019/09/asun_3900324_20190905_1567715208.pdf

They proposed reform of the income tax (ISR) and value added tax (VAT) along with the introduction of special taxes on digital services. The two bills, which were part of the 2020 Income Law, were approved by Congress at the end of 2019. Subsequently, the Tax Administration System (SAT) established the Regime for Business Activities with income generated from tech platforms, which introduced a 16% VAT as of June 1, 2020[336]. On the other hand, the collection of ISR from foreign platforms became voluntary, the responsibility of registration, reporting, and delivering profits being left to the platforms themselves until the OECD and international organizations agreed on a tax collection method[337]. Furthermore, intermediaries were required to act as ISR retainers for those who used them to offer services, with tax rates increasing gradually based on income level until reaching a maximum of 5.4%. Those rates were turned into fixed rates in 2020[338].

As of March 2021, there were already 86 fiscally registered platforms in Mexico, including Nintendo, Acorn, Amazon, Apple, Facebook, HBO, Huawei, Spotify, Uber, and Zoom. The success of tax collection was remarkable. The SAT had collected only MXN 849.6m in VAT payments from the platforms in 2019. However, in 2020, after the new regulation came into effect, it collected MXN 6.3bn, an increase of more than 600%. The tax contribution of foreign platforms in 2019 hovered around MXN 595m, but it increased to more than MXN 6bn in 2020, with expectations of further increases in the following years[339]. Moreover, some MXN 1.75bn was collected from ISR payments by taxing individuals who generated income through intermediaries (tech platforms and social media)[340].

In April 2021, the Morena party presented another proposal to charge streaming platforms 7% of the existing Special Tax on Production and Services (IEPS). However, this proposal has not advanced much. On the other hand, Netflix and Amazon agreed with this proposal, seeing it as a necessary revenue collection measure for the benefit of the country[341].

[336] "Netflix incrementa 16 por ciento sus tarifas en México" (Netflix increases its rates in Mexico by 16%), *Aristegui Noticias*, 7 May 2020, available online at <https://aristeguinoticias.com/0705/mexico/netflix-incrementa-16-por-ciento-sus-tarifas-en-mexico-fotonota>.

[337] Ernesto Pérez, personal communication, 2019.

[338] a) 2.1% for ground passenger transportation and courier services such as Uber and delivery men, b) 4% for AirBnB-style lodging services, and c) 1% for the sale of goods and provision of services such as Amazon or Mercado Libre electronic commerce. Steve Saldaña, "Morena dio reversa de último momento y bajó las tasas de ISR a vendedores de Mercado Libre y Amazon y conductores de Uber" (Morena made a last-minute reversal and lowered ISR rates for Mercado Libre and Amazon sellers and Uber drivers), *Xataka*, 29 October 2020.

[339] Steve Saldaña, "Gravar con IVA e ISR a plataformas digitales en México funcionó: el SAT recabó en 2020 600% más de lo recaudado en 2019" (Taxing digital platforms in Mexico with VAT and ISR worked: the SAT collected 600% more in 2020 than what was collected in 2019), *Xataka*, 23 March 2021. <https://www.xataka.com.mx/empresas-y-economia/gravar-iva-e-isr-a-plataformas-digitales-mexico-funciono-sat-recabo-2020-600-recaudado-2019>.

[340] Belén Saldivar, "En el 2020, plataformas digitales dejaron 8,663 millones de pesos de recaudación" (In 2020, digital platforms paid MXN 8.663bn in taxes), *El Economista*, 10 May 2021, available online at <https://www.eleconomista.com.mx/economia/En-el-2020-plataformas-digitales-dejaron-8663-mdp-de-recaudacion-20210510-0114.html>.

[341] "Plataformas de streaming apoyan aumento de impuestos, usuarios absorberán costo" (Streaming platforms support tax increase, users will absorb cost), *Expansión*, 7 September 2021, available online at <https://expansion.mx/tecnologia/2021/09/07/impuesto-streaming-mexico-usuarios-absorberan-costo>.

Digital Competition and Antitrust Policy

In Mexico, like in other parts of the world, the study, regulation, and implementation of economic competition and anti-monopoly policies in digital markets have been carried out with delay. The network economy characteristics of digital platforms and the lack of regulation for decades have allowed digital platforms to achieve exponential growth and market dominance, which had economic and social effects on other companies and consumers. In Mexico, one of the factors that further delayed the adoption of regulations was a series of conflicts and rivalry between two regulatory authorities that have some competencies in the field.

The regulators with various powers in digital competition and digital antitrust policy in Mexico are the Federal Telecommunications Institute (IFT) and the Federal Competition Commission (Cofece) whose competences in those areas were brought about by the constitutional reform of the telecommunications sector carried out in 2013[342].

In October 2020, the IFT launched an investigation into whether there are any barriers to competition in the market of internet search engines, social networks, mobile operating systems, cloud computing services, and other services. However, it halted its investigation when Cofece requested the Federal Judiciary (PJF) to decide which of the two agencies was legally competent to take such action. Previously, a similar jurisdictional conflict had occurred in the case regarding the acquisition of the shopping delivery platform Cornershop by Uber, a rideshare app[343].

[342] IFT. (2021). OTT digital platforms. December, <https://www.ift.org.mx/sites/default/files/contenidogeneral/competencia-economica/plataformasdigitalesott.pdf>, p. 87.

[343] Rodrigo Riquelme, "Cofece analizará mercados digitales; IFT se queda con sistemas operativos móviles, según el Poder Judicial" (Cofece will analyze digital markets; IFT sticks with mobile operating systems, according to the Judiciary), *El Economista*, 18 June 2021, available online at <https://www.eleconomista.com.mx/empresas/Cofece-analizara-mercados-digitales-IFT-se-queda-con-sistemas-operativos-moviles-segun-el-Poder-Judicial-20210618-0051.html>.

The Federal Law of Economic Competition (LFCE) stipulates that if the Institute and the Commission cannot reach an agreement, the PJF is to be required to resolve the conflict. In both cases, the tribunal's argument was that the use of the internet as a general-purpose technology (similar to electricity) by different players in different markets does not automatically grant any of the two regulators the absolute power to regulate them. Such cases thus, the tribunal said, must be studied on a case-by-case basis. In the Uber-Cornershop case, the PJF decided that Cofece was the right regulator to decide on the matter given that the two involved parties competed in the service intermediary market, not in the telecommunications market[344]. In the second case, the PJF decided that Cofece was the regulator competent to investigate the markets of online search services, social networks, and cloud computing services whereas the IFT was competent to investigate the market of mobile operating systems[345]. On the other hand, OTT platforms, because they compete in the telecommunications and broadcasting sector, fall under the IFT's jurisdiction.

There are ongoing Investigations of digital markets by the two regulatory authorities, including one conducted by Cofece onto the purchase and sales of retail goods online, first investigation of digital markets covering "essential inputs"[346].

[344] Cofece. (2020). Jurisdictional Competition of technological platforms: the case Uber-Cornershop. July. <https://www.cofece.mx/wp-content/uploads/2020/07/art-Cornershop-24julio2020.pdf>

[345] Cofece. (2021). The Judiciary of the Federation resolves that Cofece is the competent authority to know about the markets for online search services, social networks and cloud computing. June 18. <https://www.cofece.mx/el-poder-judicial-de-la-federacion-resuelve-que-la-cofece-es-la-autoridad-competente-para-conocer-de-los-mercados-de-servicios-de-busqueda-en-linea-redes-sociales-y-de-computo-en-la-nube/>

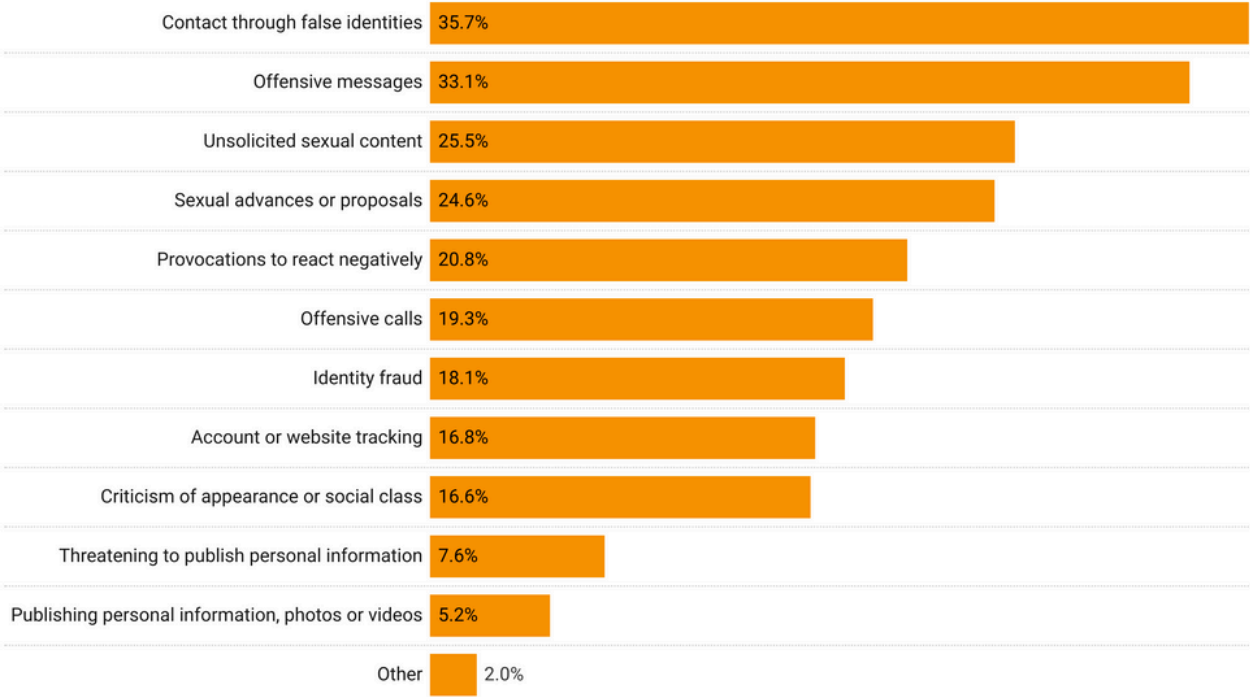
[346] Cofece. (2022). Cofece investigates possible barriers to competition and essential inputs in the retail e-commerce market. March 31. <https://www.cofece.mx/investiga-posibles-barreras-a-la-competencia-en-comercio-electronico-minorista/>

Cyberbullying

Cyberbullying is defined as “an intentional act, either by an individual or a group, aimed at harming or molesting a person through the use of information and communication technologies (ICT), specifically the internet”[347], according to the National Institute of Statistics, Geography, and Informatics (INEGI), which has been analyzing cyberbullying since 2015 as part of the Cyberbullying Module project (MOCIBA)[348]. Cyberbullying has harmful psychological, moral and economic effect, even leading to suicidal tendencies in the victims.

According to data from MOCIBA, 21.7% or 17.7 million people over the age of 12 who used the internet in 2021 were victims of cyberbullying. Eight million of them were men, with the age groups of 20 to 29 years old and 12 to 19 years old being the most vulnerable. The 50 to 59 years old group was the least vulnerable to cyberbullying. These figures show that the majority of cyberbullying victims are young women. Some 59% of the victims were attacked by strangers and 23% by acquaintances.

Types of cyberbullying, 2021



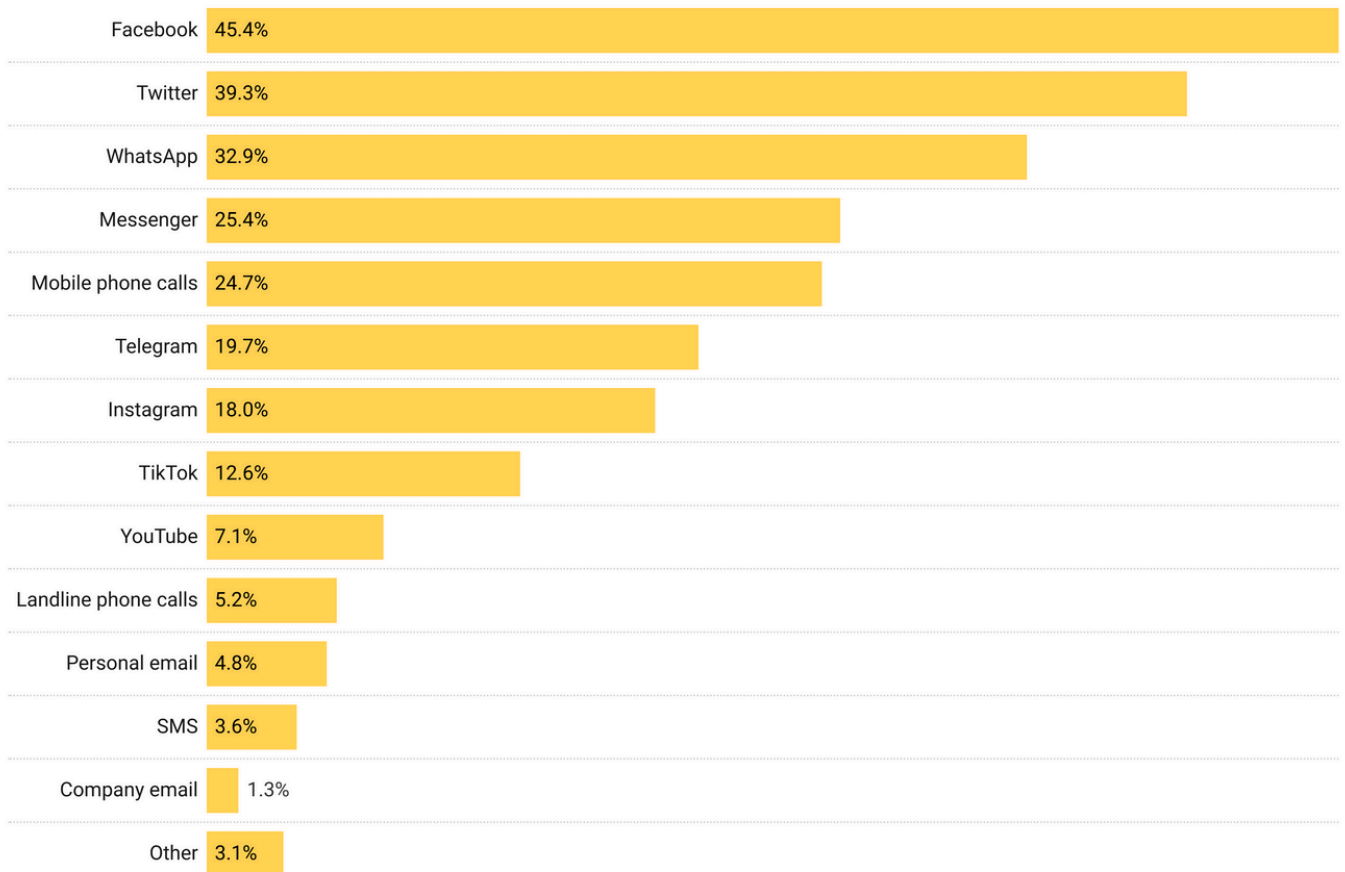
Source: MOCIBA (2021) • Created with Datawrapper

[347] MOCIBA. (2021). Module on Cyberbullying, main results 2021. <https://www.inegi.org.mx/programas/mociba/2021/>, p. 2.

[348] MOCIBA. (2021). Module on Cyberbullying, cit.

The main emotional effects caused by cyberbullying on the victims were anger, distrust, fear, insecurity, stress, frustration, and anxiety.

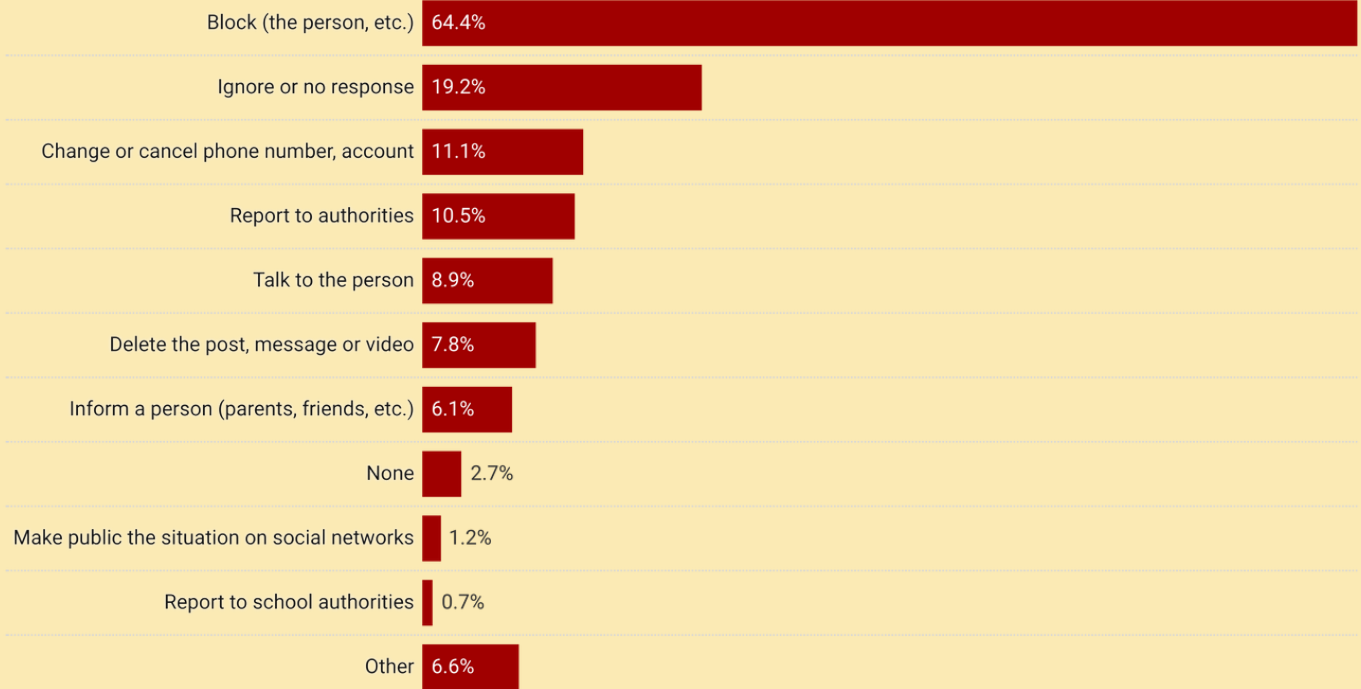
The most common platforms for cyberbullying, 2021



Source: MOCIBA (2021) • Created with Datawrapper

The majority of victims experienced cyberbullying on digital communication platforms such as Facebook and Twitter. They were followed by WhatsApp and phone calls. In response, most victims blocked the person, account, or page of the harasser or chose to ignore them or not respond. Only 10% of the victims reported the incident to the authorities, police, or service providers.

Types of responses to cyberbullying, 2021



Source: MOCIBA (2021) • Created with Datawrapper

In Mexico, the crime of cyberbullying itself is not regulated, but there are legal possibilities to prosecute such crimes. The Supreme Court of Justice of the Nation has recognized cyberbullying as a criminal offense and has instructed “state congresses to amend their legal frameworks to include these behaviors” [349]. That was partially achieved through the amendment of the General Law on Women’s Access to a Life Free of Violence and the Federal Criminal Code in June 2021. Known as the Olimpia Law, those amendments criminalize the violation of sexual intimacy through the unauthorized dissemination of intimate or sexual images of a person. The punishment for this offense is three to six years in prison and a fine calculated as 500 to 1,000 Units of Measurement and Update (UMA), an accounting unit or reference that determines the assigned value of various payment obligations as nailed down in federal and state laws. In 2023, the UMA was worth MXN 103.74 (or MXN 3,153).

[349] Luis Miguel González and Diego Badillo, “SCJN avala tipo penal para castigar ciberacoso” (SCJN endorses criminal type to punish cyberbullying), *El Economista*, 29 October 2021, available online at <https://www.eleconomista.com.mx/politica/SCJN-avala-tipo-penal-para-castigar-ciberacoso-20211028-0129.html>.

The same law, which stipulates that victims are entitled to protection orders, can be used to order owners of social media, digital media, and any individual to remove incriminated images, audios or videos[350]. Similarly, it also puts forward a series of sanctions against the use of social media to disseminate content that threatens the integrity, security, and self-esteem of women and girls.

Nevertheless, a substantial number of cyberbullying victims are male, which requires other legal provisions. One could be the set of guarantees against cyberbullying in the General Law on the Rights of Girls, Boys, and Teenagers. Crimes motivated by prejudice or that violate personal dignity are addressed in the Federal Penal Code and a few state penal codes (yet not in all of them).

Despite all these legal tools though, the adoption of a comprehensive body of legal provisions that would exhaustively cover the wide array of types of digital violence is still pending. In this context, there is a public debate in Mexico about the need to regulate social networks instead of allowing self-regulation when it comes to issues such as harmful content, misinformation and hate speech. This debate involves citizens, civil organizations, the government, companies, and international organizations[351].

[350] Maritza Pérez, "Cámara de Diputados avala la Ley Olimpia; se remite al Ejecutivo" (Chamber of Deputies endorses the Olimpia Law; forwarded to the Executive), *El Economista*, 30 April 2021, available online at <https://www.eleconomista.com.mx/politica/Camara-de-Diputados-avala-la-Ley-Olimpia-se-remite-al-Ejecutivo-20210429-0118.html>.

[351] Ver Álvarez, C.L., Brant, J. and Gómez, R. (2021). Moderación de contenidos en Internet y protección de la libertad de expresión en redes sociales. UNESCO-OBSERVACOM.

Technology and Journalism

Selective Surveillance

In Mexico, various governments, both at state and federal level, as well as private companies, have used surveillance technology against journalists, politicians, activists, and human rights defenders[352]. The most notorious case, which had a global impact, involved the use of spyware software known as Pegasus, which, installed on mobile phones and other communication devices, enables complete control over the device by a third-party. All that is required is a person's phone number to gain access to their mobile phone. Pegasus allows access to encrypted messaging applications such as WhatsApp and Signal as well as activation of microphones and cameras.

Pegasus was first detected in August 2016 by researchers from Citizen Lab at the University of Toronto. That same year, the first case of cyber espionage in Mexico, an attack targeting a group of activists and academics supporting the introduction of a soda tax, became public. In collaboration with R3D and Article 19, the activists turned to Amnesty International and Citizen Lab to verify the surveillance attempt. These efforts led to a report that presented the details of the government's spying[353].

It was later uncovered that the Pegasus software was acquired by security bodies of the Mexican State including the National Army, the Attorney General's Office and the Center for Investigation and National Security (CISEN), during the tenures of the presidents Felipe Calderón Hinojosa, Enrique Peña Nieto and Andrés Manuel López Obrador[354].

[352] "Destapa la vigilancia: promotores del impuesto al refresco, espiados con malware gubernamental" (Uncover surveillance: soda tax promoters spied on with government malware), R3D: *Red en Defensa de los Derechos Digitales* (blog), 11 February 2017, available online at <https://r3d.mx/2017/02/11/destapa-la-vigilancia-promotores-del-impuesto-al-refresco-espiados-con-malware-gubernamental/>; "Gobierno espía. Vigilancia sistemática a periodistas y defensores de derechos humanos en México" (The government spies on. Systematic surveillance of journalists and human rights defenders in Mexico), R3D: *Red en Defensa de los Derechos Digitales* (blog), 19 June 2017, available online at <https://r3d.mx/2017/06/19/gobierno-espia/>; Sonia Corona, "El Ejército mexicano compró en 2019 Pegasus para espiar a activistas y periodistas" (The Mexican Army bought Pegasus in 2019 to spy on activists and journalists), *El País*, 2 October 2022, available online at <https://elpais.com/mexico/2022-10-03/el-ejercito-mexicano-compro-en-2019-pegasus-para-espiar-a-activistas-y-periodistas.html>.

[353] R3D, "Destapa la vigilancia...", *cit.*

[354] R3D, "Gobierno espía...", *cit.*; R3D, "Destapa la vigilancia..." *cit.*; Corona, "El Ejército mexicano..." *cit.*; Mathieu Tourliere, "El caso Pegasus no avanza ni con la 4T" (The Pegasus case does not advance even with the 4T), *Proceso*, 19 June 2022, available online at <https://www.proceso.com.mx/reportajes/2022/6/23/el-caso-pegasus-no-avanza-ni-con-la-4t-288306.html>.

It was later revealed that Pegasus had been used to spy on journalists such as Carmen Aristegui who led a investigation into Enrique Peña Nieto’s White House affair; Carlos Loret de Mola, who reported on potential extrajudicial executions by the Army in Tanhuato; human rights defenders from the ProDH Center for their participation in an investigation of the Ayotzinapa case; and executives of civil initiative groups such as Mexicans Against Corruption as well as politicians like the then opposition leader and now president, Andrés Manuel López Obrador, and his family, among others[355].

The characteristics of the “anchor” messages used to break into phones are similar, the assumption being that they originated from the same source. A pattern in the Pegasus surveillance case was found: people were targeted with the software when they spoke openly and critically about governments or revealed information that could be detrimental to the interests of the ruling parties and authorities, particularly at the federation level. Citizen Lab’s forensic experts explained that the precise source of espionage could not be identified[356]. Undoubtedly though the privacy and freedom of expression of journalists and activists were grossly violated in what Amnesty International has called a case of selective surveillance[357]. A total of 88 text messages with malicious links to the Pegasus infrastructure all targeting journalists and human rights defenders were documented in 2015–2016[358].

Although #Guacamaya, a civil society group, revealed that the Mexican Army used Pegasus to hack into people’s phones, the surveillance continued at the time this report was written in March 2023[359]. President López Obrador said that his government gave no one instructions to spy on opponents or journalists, dismissing evidence of a hacking case as apocryphal[360].

[355] Elías Camhaji, “López Obrador y su familia fueron blanco del aparato de espionaje telefónico del Gobierno de Peña Nieto” (López Obrador and his family were targeted by the Peña Nieto government’s telephone spying device), *El País*, 19 July 2021, available online at <https://elpais.com/mexico/2021-07-19/lopez-obrador-y-su-familia-fueron-un-blanco-del-aparato-de-espionaje-telefonico-del-gobierno-de-pena-nieto.html>.

[356] Scott-Railton, John, Bill Marczak, Bahr Abdul Razzak, Masashi Crete-Nishihata, and Ron Deibert, “Reckless Exploit: Mexican Journalists, Lawyers, and a Child Targeted with NSO Spyware,” Citizen Lab Research Report No. 93, 19 de junio de 2017, University of Toronto.

[357] Amnesty International. How Your Phone Can Be Weaponized Against You, 2022. <https://www.youtube.com/watch?v=8r8MkMfvaPU>.

[358] R3D, “Gobierno espía...,” *cit.*

[359] Corona, “El Ejército mexicano...,” *cit.*; Zedryk Raziel, “El Ejército mexicano espía con Pegasus al activista Raymundo Ramos para interferir en una investigación sobre ejecuciones extrajudiciales” (The Mexican Army used Pegasus to spy on activist Raymundo Ramos to interfere in an investigation into extrajudicial executions), *El País México*, 7 March 2023, available online at <https://elpais.com/mexico/2023-03-07/el-ejercito-mexicano-espio-con-pegasus-al-activista-raymundo-ramos-para-interferir-en-una-investigacion-sobre-ejecuciones-extrajudiciales.html>.

[360] Presidencia de la República, “Acciones de inteligencia, orientadas a atender amenazas y riesgos a la seguridad nacional”. 23 de marzo de 2023. <https://www.gob.mx/presidencia/prensa/acciones-de-inteligencia-orientadas-a-atender-amenazas-y-riesgos-a-la-seguridad-nacional>

Given the Mexican Army's long history of human rights abuses and its increased power under the current administration, this issue merits further investigation. If the case is proven to be true, it means that, as commander of the armed forces, López Obrador "either knew about surveillance and tolerated it [...] or his own subordinates disobeyed him [...]", both scenarios being "terrible"[361]. The Office of the Attorney General of the Republic, which is supposed to be an independent body, has not made any progress on the complaints regarding the Pegasus case[362].

Surveillance and espionage practices persist in Mexico despite evidence of how they infringe on human rights, particularly those of journalists. The Pegasus case is emblematic for the much bigger scope of government surveillance on journalists and media. Moreover, there are many other cases involving state governments and other software companies that have not been documented in such detail but are equally concerning[363].

Lack of Information: The Case of Silenced Zones

There are areas in Mexico that have been designated as "silenced zones" by the Inter-American Commission on Human Rights (IACHR). They are towns, cities, municipalities, and even states where media and journalists are unable to carry out their work due to the physical and psychological violence exerted upon them by criminal groups[364]. There is no in-depth research on Mexico's silenced zones. However, the IACHR identified Tamaulipas as such an area. NGOs such as Reporters Without Borders (RSF) added Veracruz, Sinaloa, and Guerrero to the list[365].

[361] Natalie Kitroeff and Ronen Bergman, "Espionage by the Mexican Army Sparks Fears of a 'Military State'", *The New York Times*, 7 March 2023, available online at <https://www.nytimes.com/es/2023/03/07/espanol/espionaje-ejercito-pegasus-mexico.html>

[362] Tourliere, "El caso Pegasus no avanza..." cit.

[363] See, for example, Luis Herrera, "Sin rastro del uso del software Galileo para espionaje" (No trace of the use of Galileo software for espionage), *Reporte Indigo*, 27 July 2021, available online at <https://www.reporteindigo.com/reportes/sin-rastror-del-uso-del-software-galileo-para-espionaje/>.

[364] CIDH, "Zonas silenciadas: Regiones de alta peligrosidad para ejercer la libertad de expresión", Relatoría Especial para la Libertad de Expresión de la Comisión Interamericana de Derechos Humanos (México: Comisión Interamericana de Derechos Humanos (CIDH), 2017).

[365] Héctor De Mauleón, "Las zonas silenciadas de México" (The silences zones of Mexico), *El Universal*, 29 August 2017, available online at <https://www.eluniversal.com.mx/columna/hector-de-mauleon/nacion/las-zonas-silenciadas-de-mexico>.

Criminal groups use two methods to exert pressure on media and journalists. One is plain violence against media companies and journalists to prevent journalistic work from being carried out in certain areas. The second is to convince media and journalists to refrain from publishing information about criminal activities or to publish information that favors a specific gang or cartel.

Silenced regions compromise the freedom of expression of media outlets and journalists. They also violate the rights of their citizens because in these areas people face serious obstacles in freely expressing their ideas and receiving information.

Fake News and Disinformation

In Mexico, like in most countries around the world, fake news has gained greater visibility in the last decade. As a response to the proliferation of false narratives, various projects and initiatives have been designed by journalistic outlets, civil society groups and government bodies, many of which are focused on fact-checking. However, in a highly polarized political environment, combating the fake news phenomenon is extremely complicated. Three such initiatives seem to have played an effective role in fighting disinformation.

El Sabueso is a speech verification project launched in 2015 by Animal Político (Animalpolitico.mx), a native digital media outlet that aims to create content “with rigor, precision, and intended to serve citizens.” El Sabueso has a general coordinator and seven editors who are dedicated to fact-checking information circulating in the public sphere. Their methodological strategy has been inspired by similar projects such as Politifact in the U.S. and Chequeado in Argentina. El Sabueso has thus far analyzed a bevy of controversial topics concerning the federal administrations as well as electoral campaigns and health emergencies (such as the Covid-19 pandemic).

Another example is the Verificado MX project, which was founded in Mexico City following the havoc caused by the earthquakes that occurred in 2017. At that time, the project was called Verificado 19s, and its objective was to debunk and expose the misinformation that was generated after the ravage caused by the earthquakes.

The initiative was successful and hence extended to cover the 2018 electoral campaigns in which the president of Mexico was elected, the two federal chambers were renewed along with governorships of several states and hundreds of heads of municipalities. During the elections, Verificado MX turned into a collaborative project that was joined by media outlets such as Animal Político, AJ+Español, Pop Up, Newsroom, Newsweek, NGOs such as Mexicanos Contra la Corrupción y la Impunidad, and tech platforms including Facebook, X (formerly Twitter) and Google[366]. This collaborative model was inspired by two similar initiatives, Electionland and Crosscheck, developed in the U.S. and France, respectively[367]. During the 2018 electoral campaigns, Verificado MX analyzed around 400 news articles using the El Sabueso methodology. When the electoral campaign ended, Verificado MX folded.

The third project is Verificado.com.mx. Although it has a similar name to the previous project, it is a different initiative founded in 2017 by journalists Daniela Mendoza, Liliana Elósegui and Deyra Guerrero. Today it is carried out by a group of seven women journalists who have come together to work on fighting disinformation. They believe that their work is necessary to identify in the large amount of sources and data that circulate in the public sphere the news content, events and statements that are real and worth using, commenting on, and redistributing. Verificado seeks to provide citizens and journalists with reliable and trustworthy information that can be consulted on its website. Additionally, it also offers training to journalists[368]. Verificado disseminates its information on its website, but also on social media networks such as X. On its site, Verificado has fact-checked issues such as speeches and the morning conference of the President López Obrador; the Covid-19 pandemic; abortion and feminist demonstrations; and electoral processes of 2018 and 2021, among other topics[369].

Although some anti-disinformation initiatives provide useful and accurate data and facts, the info-sphere is also populated by initiatives claiming to play a role in informing the society that, however, use dubious methodologies or have a visible political bias. The federal government has been running its own fact-checking initiatives such as InfodemiaMX or the “Who is who in the lies” section of its morning press conference where news content is reviewed and data from media or messages on social media that the government considers to be false are analyzed.

[366] Belén Arce Terceros, “Verificado 2018: un ejemplo de periodismo colaborativo en las elecciones mexicanas” (Verified 2018: an example of collaborative journalism in the Mexican elections), International Journalists’ Network (IJNet), October 2018, available online at <https://ijn.net.org/es/story/verificado-2018-un-ejemplo-de-periodismo-colaborativo-en-las-elecciones-mexicanas>; Eréndira Reyes, “El futuro de VerificadoMX después de las elecciones” (The future of VerificadoMX after the elections), *Expansión*, 27 June 2018, available online at <https://expansion.mx/tecnologia/2018/06/27/el-futuro-de-verificadomx-despues-de-las-elecciones>.
 [367] Magallón Rosa, R. (2019). “Verificado México 2018. Desinformación y fact-checking en campaña electoral”, *Revista de Comunicación 18:1* (20 March 2019): 234–58, <https://doi.org/10.26441/RC18.1-2019-A12>.
 [368] “Verificado.com.mx: Saber buscar primero, para después poder verificar” (Verificado.com.mx: Know how to search first, so that you can verify later), *SembraMedia* (blog), 5 April 2020, available online at <https://www.sembramedia.org/casos-de-estudio/caso-de-estudio-verificado-com-mx/>.
 [369] “Falso y engañoso el discurso de 4º Informe de Gobierno” (False and misleading: the speech of the 4th Government Report), *Verificado* (blog), 2 September 2022, available online at <https://verificado.com.mx/falso-y-enganoso-discurso-4-informe-de-gobierno/>.

These initiatives have been criticized for spreading disinformation, and discrediting and attacking journalists and media owners[370].

A solid assessment of the information resilience in Mexico is needed to understand the problems posed by disinformation and its social impact, and to find effective strategies to fight disinformation. Such an assessment is also needed for effective regulations of the issue, but above all, to promote a healthy public sphere anchored in truthful information. To be able to achieve that, the responsibility of internet platforms, traditional media, non-governmental organizations, and politicians in the dissemination of fake news needs to be properly understood.

[370] Article 19, "(Des)Información oficial y comunicación social" (Official (dis)information and social communication), 14 March 2023, available online at <https://articulo19.org/desinformacion-oficial-y-comunicacion-social/>.

Conclusions

The technological and economic components of deploying telecommunications infrastructure are vital to build a plural public space and to ensure human rights for Mexicans. Therefore, these infrastructures and the adjacent sectors cannot be governed solely by market rules. Instead, the Mexican government should regulate and moderate the national institutions in order to ensure, among others, the universal access of the services in the field of telecoms, the diversity of the actors and the plurality of the voices of the public.

There are also alarming levels of concentration in different areas related to communications, media and the Internet (such as browsers, search engine, operating system, social networks). This concentration results in considerable and significant control, management, and use of data and information by the major global players, almost all of whom are of American origin. This gives them a privileged status to earn economic profits on a global scale, as well as political capital in a great number of countries throughout the world.

Mexican journalism, in this milieu of technological and convergent change, confronts a variety of challenges but simultaneously has many opportunities. On one hand, there are chances to access previously unthinkable sources of confidential information that reveal the power of both private and public entities, thereby aiding in the development of a robust public sphere. Conversely, certain tools and spyware pose a threat to journalistic work. Moreover, the involvement and dominance of major platforms in the advertising sector has resulted in many small journalistic firms being in jeopardy, making it harder for them to attain primary funding sources.



For more information about the project:
Media Influence Matrix
<http://journalismresearch.org>

Media and Journalism Research Center

Legal address

Tartu mnt 67/1-13b, 10115,
Tallinn, Harju Maakond, Estonia

Postal address

6 South Molton St, London,
W1K 5QF, United Kingdom

MJRC has an academic cooperation agreement
with

Universidade de Santiago de Compostela (USC)
Colexio de San Xerome, Praza do Obradoiro s/n,
CP 15782 de Santiago de Compostela.

Contact

www.journalismresearch.org
mjrc@journalismresearch.org