Miranda Intelligence – Public Affairs Chatter

More Time, Same Doubts on Mobile Registration

President Sheinbaum is expected to announce changes to the 30 June deadline for registration of mobile phone lines this week. While some sources point to a four-month extension already under discussion, others suggest that what will actually take place is a phased rather than immediate disconnection of non-compliant lines.

The official argument for the regulation is a serious one: Mexico faces an entrenched organized-crime problem in which mobile phones are routine tools for extortion, fraud, virtual kidnapping and the coordination of violence, and untraceable SIM cards genuinely complicate investigations. Few would dispute that the state has a legitimate interest in tackling this. Yet lack of trust in government institutions, combined perhaps with an expectation that implementation would be delayed or weakened, has led to a lower take-up than planned. The result is a policy whose ends most citizens share but whose means many are wary of.

That wariness is now doing some political damage. Sheinbaum has said that "more than half" of users have already registered their lines, but the last public figure with any precision pointed to just over 59 million registrations against a base of more than 140 million mobile lines — in other words, tens of millions are still missing. The concern for mobile phone users is not simply resistance to oversight: they are being asked to hand over additional personal data in a country where data leaks are common and safeguards against hacks and fraud — such as the sale of SIM cards activated using third-party information — remain weak.

Just this month, alarm was raised about the exposure of CURPs and personal data on welfare programme platforms. From the outset, civil society groups have warned that the registration model lacked clear guarantees on storage, access and accountability, leaving many wondering who will actually be protecting the data.

That question has become more pointed because the government has effectively left the telecoms companies holding much of the risk. Officials have been emphatic that responsibility for safeguarding sensitive information lies with the service providers — which in practice means the state has placed much of the compliance and reputational burden on private operators while retaining policy ownership. There is a logic to leaning on operators, who already hold customer relationships, but it also raises fair questions about where accountability ultimately sits.

The CRT added another layer of complexity by allowing companies to use existing contract data to link postpaid lines, but not prepaid ones. Critics have been quick to point out that repurposing personal data collected for one contractual purpose and applying it to another may sit uneasily with Mexican data protection law — a concern worth taking seriously even if the security rationale is sound. The fact that banks have also joined the campaign urging customers to register has widened the impression that institutional pressure is now doing the work that public communications never adequately supplied.

To be fair, Mexico is not an outlier in asking mobile users to link phone lines to an identity document: the GSMA notes that around 160 governments (ie, the large majority in the world given there are about 195 countries) have mandated prepaid SIM registration, usually on public-security grounds. Just within LatAm, Panama, for example, made identity registration mandatory for new prepaid lines from November 2023, with the regulator saying the aim was to prevent anonymous lines being used for fraud, extortion or kidnapping. Colombia ties mobile service and device use to identity controls, including IMEI registration to help block stolen or irregular phones. Brazil has long linked prepaid lines to CPF data through Anatel's Cadastro Pré-Pago, while Peru requires biometric verification against its national ID database and Chile enacted a law in early 2025 registering prepaid users and their device identifiers.

Spain requires anyone buying a prepaid SIM to prove their identity with an official document; the seller records and verifies the buyer's details and the carrier retains them, so anonymous activation is impossible. One catalyst was the 2004 Madrid train bombings, in which attackers used prepaid mobiles as detonators and an unexploded device's traceable SIM helped identify the cell. Registration came through Spain's data-retention law, Ley 25/2007, which transposed the EU's 2006 Directive partly driven by the Madrid and separate 2005 London terrorist attacks. Enforcement followed: unregistered prepaid users were disconnected from November 2009, with a window to re-register by May 2010.

Mexico itself has been here before: the RENAUT registry of 2009–2012 was scrapped after the database reportedly leaked, a precedent that explains much of today's caution. The lesson from abroad, and from home, is that registration can be made routine and administratively manageable, but only where the state, operators and regulators are genuinely clear about data security, legal purpose, consumer rights and enforcement.

In recent weeks, reports of a black market in verified SIM cards have begun to circulate, which points to a flaw in the central premise of the policy, though such workarounds afflict registration regimes everywhere and do not by themselves render the effort pointless. Experts also warn of a possible shift by unregistered users towards public and private Wi-Fi dependence, raising the risk of public WifI congestion if millions lose access to mobile data.

A four-month extension would ease the calendar, and a phased approach may give the system room to mature. But neither would, on its own, resolve the harder questions of legality, data protection, and whether the system is robust enough to deliver the government's stated objectives. The challenge for the government is not to abandon a goal that by itself makes sense, but to show that it can pursue greater security without asking citizens to trade away their privacy for unclear protection in return.

The Camps Came Down, the Argument Did Not

The dismantling of the CNTE protest encampment, nearly a month after it was established in central Mexico City, was described by the union as a "tactical withdrawal". After weeks of occupying the historic centre, escalating disruptions, and even detaining Interior and Education Ministry officials for roughly two hours, the more combative sections of the movement appear to have traded in the leverage they had accumulated for certain concessions; so what, exactly, did the union gain from all that pressure?

The figure of MXN 800 million started circulating as the price paid to clear the protesters, but the government was quick to refute this. Education Minister Mario Delgado has been explicit: the government did not hand money to the CNTE or to union leaders in exchange for ending the protest. His line is that the funding in question relates to allocations for state education budgets — teacher regularisation, permanent appointments, reclassification, additional teaching hours and retirement incentives — and that the money is managed directly by the federal and state governments, not by union intermediaries. The phrase he used was intentionally blunt: not a single peso goes through the leaders.

The deeper problem is that neither side can claim a clean win. The CNTE leaves the streets without having secured the repeal of the 2007 ISSSTE law, which remains its central demand. The government, for its part, can say it resisted pressure and avoided capitulation, but it still has no durable settlement to show for weeks of confrontation, and the threat of a return remains.

The Court Tells Google the Deadline Still Counts

Mexico's Supreme Court has refused to shield Google from a MXN 2.3 million fine imposed for failing to hand over information on time during an antitrust investigation, and in doing so has given the competition authority a procedural instrument than large platforms would like. The ruling upheld Article 73 of the Federal Economic Competition Law, which gives the National Antimonopoly Commission (formerly Cofece) a 10-day deadline, extendable once for a further 10 days, to compel information during investigations into possible monopolistic conduct.

The underlying case dates back to an investigation opened in 2022 into Google's role in the market for app-store payments and digital content transactions. Google argued that the rule was unconstitutional because it imposed a largely uniform response period without adequately accounting for the volume and complexity of the data requested. The Court disagreed. Its reasoning was direct: if the authority is to investigate anti-competitive conduct effectively, the investigative timetable cannot be hollowed out by open-ended extensions. The case now returns to a lower court to determine whether the specific fine and information request were lawful in their application, but the broader point is settled.

The judgment has implications beyond a single fine. It fits a wider pattern in which the Mexican state is seeking to tighten its procedural grip over digital actors, whether through competition law, tax oversight or data compliance. Several experts have argued that the real debate is no longer whether digital platforms should comply with Mexican law, but where the line sits between legitimate supervision and a more permanent form of state visibility into private digital systems. In that view, auditing is one thing; building a standing window into transactions, users and commercial patterns is quite another.

This case is formally about competition procedure, not tax surveillance, but it lands alongside a parallel discussion already visible in Congress. Alfonso Ramírez Cuéllar said this week that Google's separate challenge to Article 30-B of the Federal Fiscal Code underscores the need for a stronger legal framework — one that provides certainty to participants in the digital economy while also strengthening the state's capacity to prevent evasion, simulation and tax fraud.

I, Claudia

For supporters of Mexico's ruling party, *The Guardian Weekly*'s profile of Claudia Sheinbaum looked, at first glance, like exactly the kind of international validation they appreciate: a major (albeit left of centre, ''woke'') British outlet described her as the most popular left-wing leader in the world, noting her approval ratings, her handling of relations with the United States, and the fact that she reached the presidency in a country still marked by open sexism. The article also contrasted her with López Obrador — where he was theatrical, she is restrained; where he was impulsive, she is methodical — and treated her rise as both politically significant and symbolically disruptive. Read selectively, it was easy to market at home as evidence that Sheinbaum has achieved something rare: international standing without sacrificing domestic popularity.

Some of the profile's most memorable passages, however, cut in the opposite direction. Running through the piece is a question about what happens when a politician shaped by the language of human rights, social movements and historical memory ends up defending institutions that victims still experience as opaque, slow or oppressive. The most damaging section concerns disappearances: the article recalls Sheinbaum's response that the disappearances of the 1970s and 1980s were political crimes committed by the Mexican state, whereas today's disappearances are primarily linked to organised crime, with some other cases possibly being "crimes of passion". The report presents that answer as jarring — not because the contexts are identical (it explicitly recognises that they are not), but because the framing seemed to minimise the extent to which present-day disappearances may still involve state negligence, complicity or concealment.

The broader critique follows from there. Ayotzinapa appears as a case where families still see little progress; the growing role of the military in public life is treated as a continuity Sheinbaum has accepted rather than reconsidered. The article also suggests that the distance between the president and López Obrador may be more stylistic than strategic.

Overall, the profile is flattering enough, but it is also an argument that popularity and discipline do not exempt a left-wing government from the critical test: what it does when the demands of victims run into the interests of the state.

Ken Salazar's Book Lands Before It Arrives

After Reforma published excerpts from the forthcoming memoir of former US ambassador Ken Salazar, President Sheinbaum said: wait for the book. Until the full text of *Borderlands: My Fight for a More Inclusive America* is published, she argued, it would be premature to draw conclusions from selected passages and second-hand press summaries. It suggests the government does not intend to dignify a departing diplomat's recollections with a running commentary. But the restraint also betrayed an awareness that the excerpts are politically sensitive, and that almost anything she said could be turned against her predecessor's legacy or her own.

Salazar reportedly portrays AMLO's *abrazos, no balazos* security strategy as inadequate, suggests that the priority given to flagship infrastructure projects contributed to the migration crisis of late 2023, and describes repeated frustration with both Washington and Mexico City over the handling of security, border management and bilateral coordination. He also offers a series of (likely mostly self-serving) insider anecdotes — from the Air Force One landing at AIFA to his own threats to resign in moments of bureaucratic exclusion. The difficulty for Salazar is that these criticisms land awkwardly coming from him: for most of his tenure he was AMLO's most prominent foreign apologist, and a memoir that now finds fault with policies he publicly backed invites the obvious question of why he stayed so fawning for so long.

According to Reforma's early account, Salazar describes his rupture with López Obrador in 2024, following the capture of Ismael "El Mayo" Zambada and his own belated criticism of judicial reform. The report says Salazar recounts being told by a prominent Mexican intermediary that AMLO was deeply concerned about what Zambada might reveal to US authorities about Mexican politicians and officials.

In July 2022, the New York Times ran a profile by then bureau chief Maria Abi-Habib reporting growing concern inside the Biden administration that Ambassador Salazar had grown too close to López Obrador — close enough, some officials worried, to have compromised US interests. A political appointee rather than a career diplomat, Salazar was described as unusually deferential: he had echoed López Obrador's claim that the 2006 election was stolen from him and stood by publicly as the president attacked journalists and independent institutions. Former diplomats, serving officials and NGO leaders told the Times they were uncomfortable engaging an ambassador who appeared on the Mexican president's side, and openly questioned whose interests he actually represented. The piece crystallised a wider unease that Salazar's warm personal rapport with López Obrador had overstepped the line between securing top-level access (good) and not defending sufficiently robustly his country's interests (bad). The classic dilemma of a diplomat.

Yet the accommodation did not last, and when it broke it broke badly. When Salazar finally spoke out — warning in August 2024 that the judicial reform, with its direct election of judges, posed a "risk" to Mexican democracy and threatened the commercial relationship — AMLO was incensed, branding the comments imprudent interference and briefly freezing contact with the embassy.

So Salazar ended up alienating both sides at once: seemingly too deferential to AMLO for the State Department and the US business community, who felt he had done too little, too late, to protect the commercial and democratic stakes that were his core remit; and at the very end, when it barely mattered, too critical for the Mexican president he had so assiduously courted. Let us see if the memoir repeats the same mistake, satisfying no one, except for those (like us, to be fair) who are keen to read more tittle tattle on bilateral affairs of state under AMLO and Biden.

Chatter Box

USMCA Enters the Part That Matters. The 1 July meeting is now being presented less as a deadline for the trade treaty than as the moment when the formal review of the USMCA properly begins. This resets expectations. Marcelo Ebrard said after the second round of talks in Washington that the process would not conclude on that date; it is instead entering a new phase, with Mexico, the United States and Canada each expected to table their preferred route for what comes next. The treaty itself provides more than one option: it can be extended for a further 16 years, or it can move into a ten-year period of annual reviews.

According to the joint messaging from USTR and Mexico's Economy Ministry, negotiators made progress on rules of origin and economic security, began more conceptual work on agriculture, labour and the environment, and touched on steel, aluminium and automotive trade. There is also support for a committee to review implementation of Chapter 12, aimed at improving regulatory compatibility. Ebrard's own framing is more structural than diplomatic. He argues this is not just a trilateral negotiation but a systemic one, since Mexico's competitive position only makes sense relative to how Washington treats other trading partners.

Trump has publicly cast doubt on whether the US even wants to renew the agreement, saying in recent days that he would prefer not to — even as US negotiators continue to sit at the table. Ebrard's counterpoint is that the uncertainty will not clear quickly, because Washington is still redesigning its broader tariff architecture and Mexico cannot calculate its true position until that picture is more complete.

Banxico's Push for Smoother Digital Payments. The central bank has published amendments to Circular 3/2012 and Circular 14/2017, the rules governing banking operations and the SPEI system, with the stated aim of widening the use of digital payment tools and simplifying electronic transfers. The most visible effect for users will be on mobile banking: institutions will now be required to offer a more simplified and standardised experience for fund transfers through their apps — Banxico's way of saying that moving money on a phone should become easier and more consistent across providers. The changes also reinforce the use of existing infrastructure such as CoDi and DiMo, rather than attempting to reinvent the system from scratch.

The other significant change targets small businesses. Banxico is creating a new account category — Level 2 Bis — that will allow small merchants to receive larger volumes of digital payments, up to 15,000 UDIs per month, with at least 12,000 UDIs coming from digital payment methods. The policy direction is clear: push more commerce onto formal digital rails while making it easier for smaller operators to remain there. Implementation will be gradual, as banks will need to adjust their technology and operating models, but the regulatory intent is already evident.

Digital Streamlining Advances. Pepe Merino, head of the Digital Agency, said the federal government has already intervened in 3,497 procedures — roughly 60 per cent of the total universe identified for simplification — against a target of 5,594. The government now expects to close 2026 with more than 4,500 procedures simplified, with the remainder due in the first quarter of next year.

Llave MX is being positioned as the common access key for federal services and, eventually, for local ones as well. The new Civil Registry platform reduces the number of procedures from 28 to 20 and requirements from eight to five, while allowing people to correct records remotely rather than travelling to their place of birth. Passport processing has also been simplified, with the Foreign Ministry cutting the number of procedures from 21 to 5, halving processing time and pre-validating documents before the in-person appointment. For business, the more relevant development may be the Digital Investment Window, now integrated with 18 states, which reduces the number of processes required for business incorporation, construction and operation.

Merlin's Morning at the Palace. The arrival of Merlin the duck at the Palacio Nacional was, on the surface, an entertaining (but not uncriticised – including from Ricardo Salinas – who else) detour from the government's daily briefing machinery. Sheinbaum framed the invitation in exactly those terms: not simply as a social media curiosity, but as a way of making visible a Mexican family living from informal work and deserving of support. The story was widened further with details about Karla's situation as a single mother, her son's psychiatric treatment, and the household's dependence on street vending. After the morning appearance, Karla and her son went to the Mexican Institute of Industrial Property (IMPI) to register Merlin's name and image, making clear that the family does not want outside companies monetising the duck's sudden popularity without their consent. That move turns a viral mascot into a small case study in informal fame evolving into intellectual property ownership. Karla said she would not allow firms to profit from "a member of my family", though she did indicate she would make an exception for a Mexican soft drinks company whose products she said she supports. Obvio.

Morena Starts Early for 2027. Morena has formally opened the registration process for prospective candidates in the 17 states holding elections next year, giving the party an early start on what is, in practice, the first sorting round for the 2027 cycle. The process runs from 22 to 27 June, beginning with Aguascalientes, Baja California, Baja California Sur and Campeche, before moving through the rest of the map in stages. Officially, the party is presenting this as an exercise in transparency, openness and unity, with Ariadna Montiel saying the goal is to strengthen organisation and territorial work ahead of the electoral cycle.

Morena says the process will privilege the people's decision as expressed in polling, while also stressing gender parity, women's effective participation and broader criteria of political competitiveness. The party is also framing the coordinator's role in expansive terms: successful candidates are expected not just to organise locally, but to assist with political messaging, citizen engagement and the defence of the broader 4T project.

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