

IN-DEPTH

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In-Depth: Technology, Media and Telecommunications (formerly The Technology, Media and Telecommunications Review) provides a practical, business-focused survey of law and policy in the TMT sector across key jurisdictions worldwide. With a focus on recent trends and developments, it also offers useful insights into how this legal and policy landscape continues to evolve from year to year.

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Introduction

The Mexican regulatory framework governing the telecommunications and broadcasting sectors has undergone a significant reform.

In December 2024, a constitutional reform, known as the Administrative Simplification Reform, was approved. The main purpose of this constitutional reform was to dissolve several autonomous constitutional bodies, including the Federal Telecommunications Institute (IFT) and the Federal Economic Competition Commission (COFECE), among others, and to reassign their powers and responsibilities.

By dissolving autonomous regulators such as the IFT and COFECE, the reform effectively returns policy control over telecommunications, broadcasting and economic competition to the Federal Executive Branch, which marks a turning point in Mexico's regulatory landscape for telecommunications and broadcasting.

The new text of Article 28 of the Mexican Constitution provides that the Federal Executive, through the relevant government agency, shall be responsible for formulating and implementing telecommunications and broadcasting policies, overseeing regulation and supervising the use, operation and exploitation of the radio spectrum, networks and the provision of broadcasting and telecommunications services. Within this context, the Digital Transformation and Telecommunications Agency (Agency) was created and granted all the faculties referred to in Article 28.^[1]

To implement the Administrative Simplification constitutional reform, on 1 July 2025, the Mexican Congress enacted the new Telecommunications and Broadcasting Law (Telecom Law), thereby repealing the Federal Law of Telecommunications and Broadcasting, originally enacted in 2014.

One of the main outcomes of the new Telecom Law is the creation of the Telecommunications Regulatory Commission (Commission), which replaced the IFT but operates as a decentralised body within the Federal Public Administration, under the authority of the Agency. The Commission, which started operations on 17 October 2025, is integrated by five commissioners appointed by the President of the Republic and confirmed by the Senate. Its responsibilities include issuing regulatory instruments, representing the Federal Government before international organisations, granting concessions and authorisations, conducting spectrum tender processes and imposing sanctions for non-compliance, among other duties.

As can be observed, the changes in the telecommunications regulation are very recent; therefore, it remains to be seen how the newly created Commission and Agency will evolve in practice and what their impact will be on the sector.

In terms of convergence, we consider the constitutional reform and the new Telecom Law could have an impact on convergence matters. By centralising regulatory authority under the newly created Commission and the Agency, the framework that has traditionally allowed for technological and service convergence among telecommunications, broadcasting and digital platforms could be altered by secondary regulations or criterion issued by the new regulatory authorities, creating uncertainty for operators and slowing down innovation and investment in convergent services. Nevertheless, we expect for

the new authorities to maintain a flexible and technology-neutral approach that allows convergence to continue developing and even expanding under a more integrated policy model.

Year in review

Undoubtedly, this year in Mexico was marked by the dissolution of the autonomous regulators resulting from the constitutional reform and the issuance of the new Telecom Law, which additionally to the institutional redesign (the Federal Telecommunications Institute (IFT) was replaced by the Commission, under the authority of the Agency and Federal Executive, and all competition matters were transferred to the new National Antitrust Commission) introduced significant changes, such as:

1. Participation of State-owned enterprises: One of the most significant changes introduced by the new Telecom Law is that it expressly empowers the Mexican State to participate, through State-owned enterprises, in the provision of commercial telecommunications and internet services under certain conditions. While this approach seeks to expand connectivity and promote universal access, it may also pose challenges to maintaining fair competition and a level playing field in the sector, particularly if the participation of public entities is not accompanied by clear safeguards ensuring neutrality and transparency.
2. Regulation of Digital Platforms: The Telecom Law introduces for the first time regulation to 'digital platforms', which are defined as any digital services provided through the internet for offering, marketing, supplying services, applications, products or content. Operators of digital platforms must comply with specific obligations related to advertising (i.e., shall verify not transmitting on their platforms any type of advertising from foreign governments, except for cultural, tourism and sports purposes) and failure to comply with such obligations will be sanctioned with monetary penalties. Likewise, any app or content provider is obliged to comply with mandates from certain authorities to collect information and maintain a registry related to its clients' communications.
3. Infrastructure regulation: Providers of passive infrastructure will be subject to obligations related to the deployment, maintenance, reorganisation and dismantling of infrastructure, for which the Commission will issue the corresponding regulation. Failure to comply could result in economic sanctions.

On the other hand, during 2025 we have seen some interesting mergers in the sector.

In July 2025, SES, a leading global satellite operator, announced the completion of its acquisition of Intelsat, resulting in the creation of a new global operator with a combined fleet of more than 120 multi-orbit satellites and an expanded ground network enabling worldwide connectivity solutions. In Mexico, the transaction was approved by the IFT on 20 June 2025, following an in-depth review. The former regulator, despite identifying high market shares in certain segments, cleared the merger after determining that several factors would limit SES and Intelsat's ability to coordinate prices or restrict supply. These factors reflect current dynamics in the satellite market, including: (1) the growth and

consolidation of new technologies, such as the deployment of fibre-optic networks, which serve as alternatives for satellite capacity customers; and (2) the increasing distribution of audio and video content through over-the-top (OTT) platforms, which has reduced demand in the wholesale media services segment that traditionally relied on geostationary (GEO) satellite capacity.

In October 2025, the IFT authorised the Federal Electricity Commission (CFE) to indirectly acquire a 23.08 per cent minority interest in Altán Redes, SAPI de CV (Altán), the wholesale concessionaire responsible for deploying and operating the Red Compartida network. Through this investment, CFE seeks to strengthen its participation in connectivity projects aligned with its public telecommunications initiative, CFE Telecomunicaciones e Internet para Todos (CFE TIT), which provides non-profit internet and mobile services and access to CFE's passive infrastructure.

The IFT determined that the transaction does not grant CFE control over Altán, but its approval was subject to a set of behavioural and structural conditions, including: maintaining operational independence between Altán and CFE's economic group, prohibiting the exchange of sensitive information, and requiring that both entities offer wholesale services on a non-discriminatory basis. Additionally, CFE must relinquish its wholesale commercial concession to prevent any telecommunications service provider from exerting influence over the Red Compartida.

As for relevant cases, in June 2025, the IFT sanctioned Telcel (Radiomóvil Dipsa) for engaging in a relative monopolistic practice and imposed fines on Impulsora de Mercados de México, SA de CV (IMMEX) and Cadena Comercial Oxxo, SA de CV (Oxxo) for having aided and facilitated such conduct. The IFT determined that Telcel granted incentives and benefits to Oxxo and IMMEX on the condition that they refrain from selling competitors' SIM cards, thereby restricting access to the mobile telephony market and limiting consumer choice. As a result, the IFT imposed fines of 1,782.6 million Mexican pesos on Telcel and 19.5 million pesos each on Oxxo and IMMEX.

Looking ahead, 2026 will be a critical year to assess how the new institutional framework takes shape, whether the recently created Commission and Agency can ensure regulatory continuity, and to what extent these changes will foster (or hinder) investment, competition and innovation in the Mexican telecommunications market.

Regulation

Regulators

The Commission operates as an administrative unit within the Agency, and its main responsibilities are:

1. regulate the use of the radio-electric spectrum, telecommunication networks and the provision of telecommunication and broadcasting services.
2. grant, revoke or authorise concessions and authorisations.
- 3.

issue administrative regulations, technical plans, procedures, programmes and guidelines required for compliance with the law.

4. coordinate orbital resource procedures with international organisations and take the necessary actions to ensure the continuity of Mexico's assigned orbital resources.

On its side, the Agency is responsible for the development of federal telecommunications and broadcasting policies, the design and implementation of universal and social programmes, and the management and supervision of the efficient use of satellite capacity, among other responsibilities.

Another regulatory authority that is involved in the telecommunications and broadcasting sectors is the Federal Consumers Agency (Profeco). Profeco is the entity in charge of protecting, advising, defending, reconciling and representing end-users and consumers before the operators that provide telecommunications services. In fact, Profeco is the entity in charge of supervising compliance of NOM-184,^[4] a Mexican official norm that establishes the obligations of telecommunications service providers to protect consumers, requiring the registration of service contracts to prevent abusive practices and ensure clear, fair conditions for telecom services such as telephone, internet, and television.

In addition, under the new regulatory framework, the National Antitrust Commission (Antitrust Commission is the new regulatory body that will oversee all competition matters, including those in the telecommunications and broadcasting sectors). The Antitrust Commission has assumed the powers previously held by the IFT related to competition, such as preponderance, substantial power and cross-ownership.

Main sources of law

The main sources of law in the telecommunications and broadcasting sector are the Constitution, the Telecom Law, the Federal Economic Competition Law, Mexican official standards, regulations, rules, guidelines and any other administrative or technical rulings issued by the regulator.

In terms of the transitory dispositions of the new Telecom Law, all provisions previously issued that result contrary to the provisions of said legislation will not be applicable. As a result, the regulations, rules, guidelines and the administrative or technical rulings issued by the IFT may be updated during the following months.

Regulated activities

The Telecom Law establishes two types of licences for the provision of telecommunications or broadcasting services in Mexico: concessions and authorisations.

A sole concession allows the provision of all types of telecommunication services except for the use of spectrum or orbital resources (geostationary orbital positions or satellite orbits assigned to Mexico). The sole concession can be granted for commercial use, public use (governmental entities), social use (cultural, scientific or educational) or private use

(experimental, testing, diplomatic). Concessions are granted generally for a maximum period of 30 years, renewable for the same period if certain conditions are met.

The use and exploitation of frequency bands and orbital resources require a specific concession granted by the Commission for these purposes. These concessions are granted through a public bid process and are subject to the payment of a governmental fee and specific obligations, such as coverage areas.

On the other hand, an authorisation will be needed for the performance of any of the following activities:

1. commercialisation or resale of telecommunications services;
2. installation and operation of transmitting earth stations (receive-only antennas do not require any authorisation), as well as for the purposes of space radiocommunications or communications with high-altitude platforms;
3. installation of telecommunications equipment or any transmission media that cross the borders of the national territory;
4. landing rights from foreign satellites;
5. use of spectrum bands for diplomatic visits;
6. use of spectrum bands for testing or experimental purposes;
7. use spectrum bands for secondary use in specific events or in facilities intended for commercial or industrial activities; and
8. use of unassigned spectrum bands to develop and operate smart radiocommunication networks.

The process to obtain an authorisation is simpler and quicker compared to a concession. Authorisations are granted for periods of up to 10 years, renewable for equal periods.

Ownership and market access restrictions

The Telecommunications Law establishes restrictions on foreign investment participation exclusively in the provision of broadcasting services, where foreign investors may hold up to 49 per cent ownership, subject to reciprocity with the investor's country. As for other telecommunications services, there are no restrictions on foreign investment. However, concessions and authorisations are granted only to Mexican individuals or entities, which in turn may have up to 100 per cent foreign investment.

The Telecom Law provides for the concept of preponderance, which applies to economic agents holding a market share exceeding 50 per cent in either the telecommunications or broadcasting sectors. Once designated as a Preponderant Economic Agent, the entity becomes subject to asymmetric regulations and specific obligations. In 2014, the IFT designated two corporate groups as Preponderant Economic Agents: América Móvil in the telecommunications sector and Grupo Televisa in the broadcasting sector. These designations resulted in the issuance of regulatory measures aimed at preventing market abuse and imposing restrictions on the provision of their services.

In 2024, the IFT completed biennial reviews of the asymmetric measures imposed on both América Móvil and Grupo Televisa. In the case of America Movil, the review resulted on the imposition of stricter obligations, including the mandatory delivery of unlocked devices, the elimination of mandatory contract terms, and reinforced wholesale and replicability rules to ensure fair access for competitors. As for Grupo Televisa, IFT resolved to maintain and slightly adjust the obligations that prevent the broadcaster from leveraging its preponderant position in advertising, content distribution and access to infrastructure.

Transfers of control and assignments

Concessions for commercial or private use may be assigned total or partially, as long as at least three years have passed since the date the concession was granted. As for concessions for commercial use, applicant must obtain, prior to the submission of the relevant application, a favourable opinion from the Antitrust Commission regarding the effects that such act may have on the relevant market. The Commission must resolve such applications within a term of 40 calendar days and could impose conditions on the assignee.

No authorisation is required in case assignment of the concession results from a merger, a split or a corporate restructure within the same control group; however, such transaction must be notified within a 30 calendar days term following the operation closure.

If a concessionaire subscribes or sells shares or equity that represent 10 per cent or more of its capital stock, it must notify the Commission before the operation is closed. After requesting the Agency's opinion, the Commission will have a 30-day term to manifest any objection to the operation (unless an antitrust procedure is triggered).

Telecommunications and internet access

Internet and internet protocol regulation

In Mexico, internet and broadband access is a fundamental right guaranteed by the Constitution. The internet has a major role, as it is an enabler for other fundamental rights provided in the Constitution, such as the information access right, the right to privacy and the right of access to information and communication technology (ICT).

Internet access service providers require a sole concession and must comply with the following principles regarding net neutrality:

1. free decision;
2. non-discrimination;
3. privacy;
4. transparency and information; and
5. others covered by the Constitution.

The new Telecom Law modifies the principles to be followed by concessionaires and authorisation holders that provide internet access services, eliminating from text the principles of traffic management, quality and infrastructure sustained development.

IP-based services, such as voice over internet protocol, are not regulated in terms of the applicable legal framework. These services are only subject to regulation when they interconnect with a public telecommunications network in Mexico, at which point they must comply with telecom regulations, including interconnection requirements. Also, foreign operators may execute agreements with local operators for international connections that can include IP protocols.

In terms of the Telecom Law, the Commission may issue new guidelines related to net neutrality or amend existing ones to ensure consistency with the law. We expect such guidelines to be issued within the next year.

Universal service

The 2025–2030 National Development Plan recognises that one of the government's objectives is to guarantee public access to telecommunications and to broadband services.

Article 9 of the new Telecom Law provides that the Agency, in coordination with the Commission, will promote access to ICT and broadcasting and telecommunications services, and will issue a national plan for access to broadband connectivity and other programmes that guarantee broadband access in public places, identifying the number of sites to connect each year progressively until universal coverage is reached. Likewise, the Agency and the Commission will carry out the necessary actions to contribute, within the scope of its authority, to the achievement of the objectives of the universal digital inclusion and universal coverage.

On that note, the sectoral programme of the Agency reflects the objectives set by the Federal Government and establish that connectivity in rural communities and in areas known as 'Polos del Bienestar' (designated territories where targeted tax benefits and administrative facilities are granted to foster economic activity) must be a priority.

In turn, CFE TEIT (a governmental mobile virtual network operator (MVNO) which now operates as a business unit within CFE), has been carrying out various actions aimed at increasing public access to telecommunications and broadband services. At present it offers mobile telephony and internet service packages in areas with limited connectivity at low prices and has implemented free internet access points across the country.

Restrictions on the provision of service

Concessionaires and authorisation holders must comply with the following obligations related to the services provision, among others:

1. to provide services with the quality commitments assumed;
2. to use an open network design that allows interconnection with their networks if another concessionaire requests so;
3. to perform number portability as per the request of end-users; and

4. to provide services on a non-discriminatory basis.

Prices charged to end-users are determined by the concessionaire. However, these must be registered at the Public Registry of Concessions. In relation to end-users, NOM-184 establishes specific obligations and minimum requirements for the provision of telecommunications services.

The Antitrust Commission may establish restrictions for telecommunications and broadcasting providers if competition risks are verified. Moreover, economic agents classified as preponderant or with substantial power in the relevant market may be subject to specific obligations or restrictions, including the following:

1. in the telecommunications sector:

- asymmetric interconnection tariffs.
- accounting separation; and
- issuance of public offers for the provision of wholesale services; and

2. in the broadcasting sector:

- issuance of public offers for the use of their passive infrastructure;
- restrictions on acquiring exclusively relevant audiovisual content;
- a prohibition on participating in any matter with the preponderant agent in the telecommunications sector;
- publication of rates and commercial conditions for advertising spaces on open TV; and
- must-carry or must-offer obligations.

By the end of 2024, some obligations and restrictions were modified to include certain key changes. For example, requiring the preponderant agent in the telecommunications sector to provide unlocked devices and eliminating mandatory contract terms for the provision of services. These changes are derived from a constant review from the Commission of the asymmetric regulations imposed to the preponderant agent to ensure the strengthening of competition.

Privacy and data security

The Telecom Law provides that concessionaires and authorised operators must collaborate with the security and law enforcement agencies in security matters, such as the lawful interception of telecommunications equipment and data retention obligation, including keeping records and maintaining control of communications, among other duties.

Regarding cybersecurity matters, Mexico does not yet have a specific law dedicated to cybercrime, although various laws and regulations address cybersecurity matters, such as cybercrime, national security, data protection, labour, finance among others. In recent

years, several initiatives to pass a cybersecurity law have been proposed; however, none has been approved.

Mexico has executed international treaties that provide for specific actions on cybersecurity matters. The United States–Mexico–Canada Agreement (USMCA) establishes specific commitments and provisions related to cybersecurity in Chapter 19 on Digital Trade, aimed at enhancing data protection and promoting cybersecurity cooperation. Furthermore, Mexico participated in the negotiation of the United Nations Convention against Cybercrime, approved by the UN General Assembly in December 2024. This instrument seeks to strengthen international cooperation in combating cybercrime and once ratified by Mexico, will require the country to harmonise its legislation with the agreed cybersecurity objectives.

In terms of personal data protection, since 2009, Article 16 of the Mexican Constitution has recognised the right to personal data protection. This right is governed by two main laws: the Federal Law for the Protection of Personal Data Held by Private Parties and the General Law for the Protection of Personal Data in Possession of Obligated Subjects, alongside the General Law on Transparency and Access to Public Information. Following the constitutional reform, the National Institute of Transparency was dissolved, and its functions were transferred to the Anti-Corruption and Good Governance Secretariat.

Spectrum policy

Development

The year 2025 has been marked by a major regulatory shift stemming from the recent constitutional reform and the enactment of the new Telecom Law.

The Commission is the new entity responsible for the regulation, promotion and supervision of the use and exploitation of the radioelectric spectrum and orbital resources. Spectrum and orbital resources shall be managed and controlled by the Commission, who shall perform such duties in compliance with the Constitution, the Telecom Law and international treaties and agreements to which Mexico is party, following the recommendations of the International Telecommunications Union (ITU) and other international agencies.

Given the IFT remained in operation only until last October 16, there is still no clear direction regarding the spectrum management and frequency use policy to be adopted by the new regulator. However, it is evident that the current administration has placed strong emphasis on promoting universal connectivity and access. Accordingly, it is expected that the deployment of 5G networks will be prioritised, as Article 28 of the Telecom Law establishes a 180-day period for the issuance of a spectrum auction plan for the allocation of frequency bands intended for mobile wireless access services.

Regarding spectrum use planning, the Commission has the obligation to issue each year, in coordination with the Agency, the Annual Program for the Use and Exploitation of Frequency Bands (Frequency Program), which identifies the frequency bands that may be assigned directly or that will be subject to a bidding procedure, as well as services that

can be provided through the use of such frequency bands. In this regard, it is important to note that the Frequency Program for 2026 (usually published in September of the previous year) has not been issued yet.

Flexible spectrum use

The IFT was aware that the efficient use of spectrum is a key factor to guarantee spectrum availability for existing and new applications and technologies, and during the past years has focused on restructuring the spectrum by changing the authorised use for certain frequency bands, assigning spectrum for new applications and minimising or avoiding an 'atomised use' of the spectrum, including the following frequency bands: 410–430MHz, 440–450MHz, 450–470MHz, 470–512MHz, 608–698MHz, 698–806MHz, 806–824/851–869MHz, 1710–1780/2210–2180MHz and 2500–2690MHz.

In December 2024, the IFT approved the classification of the 64–71GHz frequency band as unlicensed spectrum, extending the existing 57–64GHz allocation. This decision added 7GHz of contiguous unlicensed spectrum, fostering the development of advanced technologies such as Wi-Gig, wearables and virtual and augmented reality devices. The measure aligns with international best practices and supports innovation in wireless communication, particularly benefiting accessibility solutions and smart device integration.

Likewise, on November 2024, Globalstar's subsidiary in Mexico resulted as the winning bidder in the public auction #13 of IFT regarding the complementary terrestrial service of the mobile satellite service in the frequencies 2483.5 to 2495MHz in Mexico.

Broadband and next-generation services spectrum use

Despite ceasing operations in October 2025, the IFT successfully positioned Mexico as the second-leading country in Latin America in terms of IMT spectrum allocation and set the basis for future assignments, to address the increasing demand for connectivity.

Since 2019, the IFT acknowledged that demand for broadband mobile services was increasing exponentially, and that the regulator must exercise all efforts to make more spectrum available in an efficient manner, increasing the amount of spectrum assigned to IMT. According to the document published by IFT in December 2022 called 'IMT in Mexico' by that time Mexico had allocated 660MHz to IMT, considering already the spectrum relinquished by Telefónica Movistar in the bands of 850MHz and the PCS bands, but it was estimated that such number could increase within the next years up to 1170MHz allocated to IMT.

It remains to be seen if the new Commission will continue IFT's strategy for the planning, allocation and identification of frequency bands for the IMT. In any case, actions implemented shall be grounded in international best practices, ITU-R Reports and Recommendations, and adequate management and administration of the national spectrum.

Spectrum auctions and fees

In January 2025, at the request of the newly created Agency, the IFT cancelled Spectrum Auction No. 12 for mobile services.^[6] The auction included several spectrum blocks in frequency bands such as 600MHz, 2.5GHz, 800MHz and the L band, among others suitable for the provision of 5G services. Such frequencies were included in the 2020–2024 Annual Programs for the Use and Exploitation of Frequency Bands, published by the IFT, with the purpose of being allocated for commercial use through public bidding processes.

In this regard, the new Telecom Law provides for the issuance of a 5G spectrum auction plan within 180 days, so we expect a new auction will be launched by 2026, including some or all the frequencies previously included in the IFT Auction No. 12.

It is worth noting that in previous auctions issued by IFT, some frequency bands were not awarded to any operator (i.e. 1755–1760/2155–2160MHz and 1910–1915/1990–1995MHz during Auction IFT-10); this situation is attributed by most experts to the spectrum's high cost, which has become an artificial barrier for the entry of new competitors, and also to the fact that some of the frequency bands corresponded to regions with poor commercial interest due the lag of mobile communication services (which must be said does not help to reduce the digital breach in the most disadvantaged areas).

Mexico is still ranked among the countries with the most expensive spectrum. In this regard, the IFT proposed during its life time a few amendments to the Federal Law on Governmental Fees, in particular the last one submitted in 2023 suggested to allocate revenues derived from the use of spectrum to the expansion of telecommunications services coverage in underserved areas. The proposal suggested that investments in network infrastructure could serve as a compensation mechanism to reduce spectrum usage fees. In this regard, the Commission just recently issued a press release stating that the spectrum costs in Mexico are 7% below the international average. Many experts in the field have questioned the basis of such a statement, however at this stage it remains to be seen whether the Commission will continue supporting the proposal to reduce the spectrum fees.

Media

Regulation of media distribution generally

The Telecom Law regulates broadcasting services (TV and radio) as well as terrestrial and satellite restricted audio or television services (cable TV and direct-to-home (DTH)); in both cases a sole concession is required, and in the case of broadcasting, a concession for the use of spectrum will be needed as well.

Programming and publicity for both broadcasting or restricted audio or television services is regulated under the Telecom Law. Furthermore, the Telecom Law now includes a prohibition on broadcasting and restricted television concessionaires from transmitting political, ideological, commercial or any other type of propaganda from foreign governments, except for content related to tourism, culture or sport. In addition, digital platforms, programmers and operators are prohibited from marketing or transmitting

advertising or any information from foreign governments, unless the content serves tourism, cultural or sporting purposes.

The Telecom Law establishes must-carry or must-offer obligations, which means that broadcast TV concessionaires are obliged to allow pay-tv concessionaires (cable TV or DTH) to retransmit their signals on a free and non-discriminatory basis; in turn, the concessionaires that provide restricted television services are obliged to retransmit the broadcast television signal on their network.

OTT platforms require no licence to operate and provide services in Mexico; however, in 2020, a tax scheme was approved whereby foreign companies that provide digital services in Mexico (digital platforms and applications) must collect VAT from their customers for the services provided in Mexico. Additionally, a reform to the Federal Tax Code was recently approved, establishing that digital platforms (including OTT operators) must provide the tax authorities with online and real-time access to information enabling them to verify compliance with tax obligations, in accordance with the provisions to be issued by the tax authority.

Internet-delivered video content

As noted above, under the Telecom Law OTT video-on-demand (VOD) providers do not require a concession or authorisation to provide services in Mexico; nor are they subject to any specific regulations, as they are direct beneficiaries of the net neutrality principles. Nonetheless, as noted before, owing to a tax reform, since 2020 OTT VOD service providers are obliged to register in the Mexican taxpayer registry and to collect VAT from their users.

According to a survey conducted by the IFT in 2024, 55 per cent of Mexicans consumed audiovisual content via the internet, representing a significant increase from 26 per cent in 2015. This shift in preference has led content providers to make their programming available through internet-based streaming and on-demand services, as viewers are increasingly 'cutting the cord' from satellite and cable television. Industry trends indicate that the number of pay-tv subscribers is declining, while the number of internet streaming subscribers continues to grow, driven by both changing viewer habits and evolving content distribution strategies.

Outlook and conclusions

The main challenges ahead include the steep learning curve that newly appointed officials at the recently created regulatory entities will face, as well as the procedural backlog that will inevitably result from the implementation of new laws, institutions and administrative frameworks.

In the telecommunications sector, these changes are particularly significant given the complex regulatory environment in Mexico, which has traditionally relied on specialised and autonomous bodies to oversee competition, spectrum management and public service obligations. The transition to new regulatory entities will require ensuring continuity in the enforcement of existing rules and maintaining legal certainty for market participants.

The principal concern within the industry lies in whether these new regulatory bodies will be able to preserve their independence from political or ideological influence, particularly from the President of Mexico, who will act as the ultimate administrative and political authority under the new constitutional framework.

Endnotes

- 1 As a result of the reform to the Federal Public Administration Law approved on November 2024:
https://dof.gob.mx/nota_detalle.php?codigo=5744005&fecha=28/11/2024#gs.c.tab=0. ^ [Back to section](#)
- 2 As a result of the reform to the Federal Public Administration Law approved on November 2024:
https://dof.gob.mx/nota_detalle.php?codigo=5744005&fecha=28/11/2024#gs.c.tab=0. ^ [Back to section](#)
- 3 <https://www.ift.org.mx/comunicacion-y-medios/comunicados-ift/es/el-ple-no-del-ift-cancela-el-proceso-de-la-licitacion-de-espectro-radioelectrico-para-servicios>. ^ [Back to section](#)
- 4 NOM-184-SCFI-2018 'Normative elements and specific obligations that suppliers must observe for the commercialisation and/or provision of telecommunications services when using a public telecommunications network.'. ^ [Back to section](#)
- 5 Such as NOM 184. ^ [Back to section](#)
- 6 <https://www.ift.org.mx/comunicacion-y-medios/comunicados-ift/es/el-ple-no-del-ift-cancela-el-proceso-de-la-licitacion-de-espectro-radioelectrico-para-servicios>. ^ [Back to section](#)



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