

BILATERAL X-RAY REPORT

2022



U.S. - MEXICO
FOUNDATION



Instituto Mexicano para la Competitividad A.C.



BILATERAL X-RAY

THINK TANK ANALYSIS



Executive Summary

In order to promote greater cooperation between Mexico and the United States, it is important to stay current with their joint agenda. To accomplish this, the U.S.-Mexico Foundation (USMF) and the Instituto Mexicano para la Competitividad (IMCO) have partnered to monitor the publications of Think Tanks in both countries. They have produced a monthly report that highlights the most important topics and recurring events within the bilateral relationship. This annual report summarizes the monthly reports and provides a comprehensive overview of the discussions and events that occurred in 2022.

The report includes a detailed analysis of the publications, topics covered, and distribution formats, as well as an examination of the three most frequently mentioned topics. Furthermore, the report identifies topics that were not addressed but could be opportunities for future publications. Overall, the report is a valuable resource for anyone who wants to better understand the current state of the U.S.-Mexico bilateral relationship.

INDEX

I. INTRODUCTION.....	4
II. DESCRIPTIVE ANALYSIS.....	5
Types of Publications.....	6
Topics Covered.....	7
Think-Thank Coverage.....	8
Topics and Current Affairs.....	10
III. CONTENT ANALYSIS.....	11
Institutional Relationship.....	11
Migration.....	14
International Trade.....	16
IV. OPPORTUNITIES.....	19
V. CONCLUSION.....	21
VI. ANNEX.....	22

I. INTRODUCTION

Since July 2020, the U.S. Mexico Foundation (USMF) and the Instituto Mexicano para la Competitividad (IMCO) joined forces and created the Bilateral X-Ray to monitor the publications by Think Tanks from Mexico and the United States on a monthly basis. Currently, there are 37 Think Tanks being monitored, of which 24 are based in the U.S. and 13 are based in Mexico (see Annex A). Throughout 2022, twelve reports were compiled that collected and categorized all publications related to the bilateral relationship according to their respective topics.

This document gathers the information collected throughout the year in order to obtain a bigger picture of the topics discussed and the most relevant events. The first section describes the type of publications, the topics covered, as well as the distribution format. The second section analyzes the texts and distinguishes the most relevant topics. Finally, the third section identifies the opportunities derived from the publications, as well as some final remarks.

Objectives:

- Identify the main topics addressed by Think Tanks regarding the bilateral relationship.
- Determine which Think Tanks are the most active and what subjects they specialize in.
- Identify keywords and phrases being used by Think Tanks in their publications.
- Analyze the relevant issues that are not being addressed in publications and what research opportunities Think Tanks have regarding the bilateral relationship.

II. DESCRIPTIVE ANALYSIS

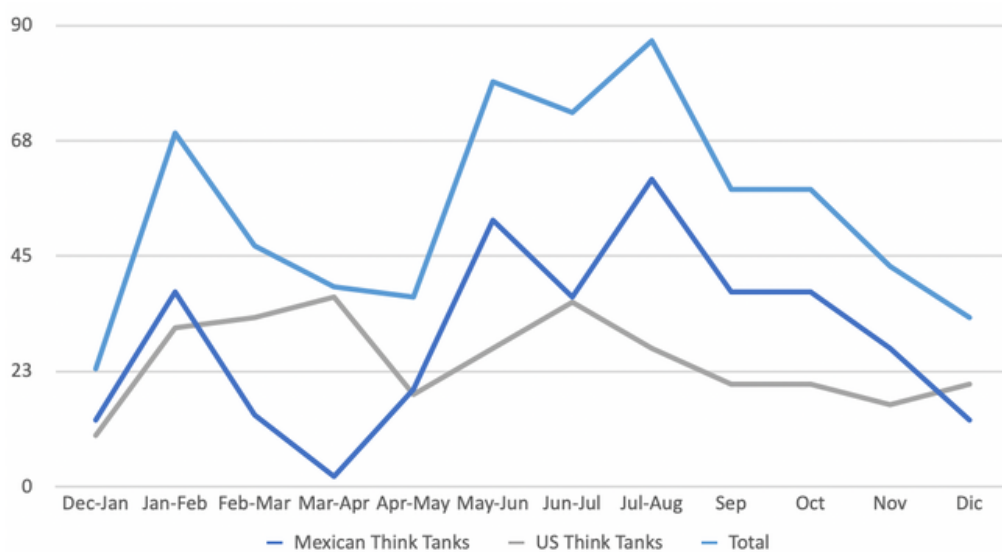
The analysis covers the publications between December 16th, 2021, to December 31st, 2022. Within this period, there were a total of 543 publications related to the bilateral relationship between Mexico and the United States. 47% of the notes were published by Think Tanks in the United States, while 53% were published by Think Tanks in Mexico. The three U.S. Think Tanks with more publications were the Mexico Institute, the Brookings Institution, and the Center for Strategic and International Studies (CSIS). On the other hand, the three Mexican Think Tanks with more publications were Consejo Mexicano de Asuntos Internacionales (COMEXI), Instituto Mexicano para la Competitividad (IMCO), and Mexico Evalúa.

Table 1. Number of publications by country

Country	No. of Publications
United States	255
Mexico	288

Source: USMF-IMCO with data collected from Think Tank's websites.

Figure 1. Number of publications per report



Source: USMF-IMCO with data collected from Think Tank's websites.

TYPE OF PUBLICATIONS

Publications are categorized based on the format used by Think Tanks. The three primary formats employed in the publications were articles (67%), event snapshots (4.8%), and comments and reports (2.9%). Following these formats, videos, podcasts, and infographics are among the most common types of publications.

Table 2. Type of publication

Type of publication	No. of Publications
Digital article	405
Event snapshot	26
Commentary	16
Reports	16
Blog post	12
Videos	11
Podcasts	10
Infographics	8
Webinar	8
Interview	7

Source: USMF-IMCO with data collected from Think Tank's websites.

TOPICS COVERED

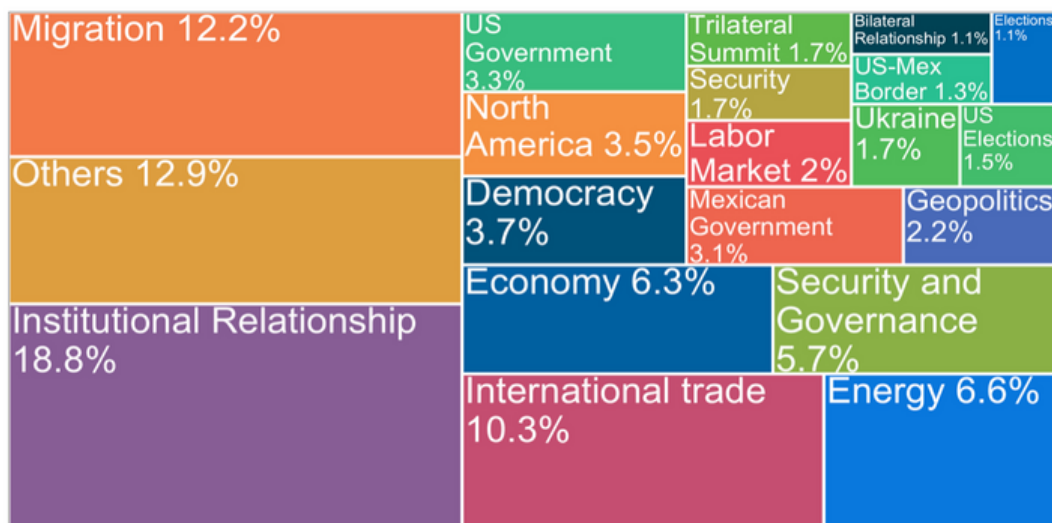
In order to better understand and cover the agenda regarding the bilateral relationship, the publications were classified into more than 25 major topics.

The ten most mentioned topics throughout the year in order of recurrence were:

1. Institutional Relationship
2. Migration
3. International Trade
4. Energy
5. Economy
6. Security and Governance
7. Democracy
8. North America
9. U.S. government
10. Mexican government

The publications regarding these topics represent 73.5% of the total publications during 2022 (Figure 2). Other topics such as geopolitics, labor market, the Trilateral Summit, U.S. elections, security, and the border represent 12.9% of the mentions in the publications.

Figure 2. Publication distribution by topic

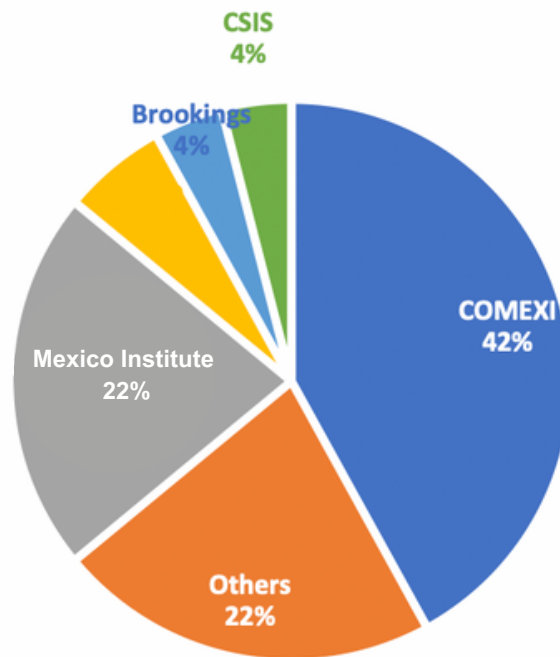


Source: USMF-IMCO with data collected from Think Tank's websites.

THINK-TANK COVERAGE

The monthly reports have shown that certain Think Tanks have greater expertise and specialization in the bilateral relationship, resulting in more extensive coverage. The Consejo Mexicano de Asuntos Internacionales (COMEXI)¹, Mexico Institute, Instituto Mexicano para la Competitividad (IMCO), Brookings Institution, Center for Strategic & International Studies (CSIS) were found to have the highest number of publications on the Mexico-U.S. relationship. These five centers accounted for 78.2% of the overall publications collected during 2022 (see Figure 3).

Figure 3. Publication distribution by Think Tank



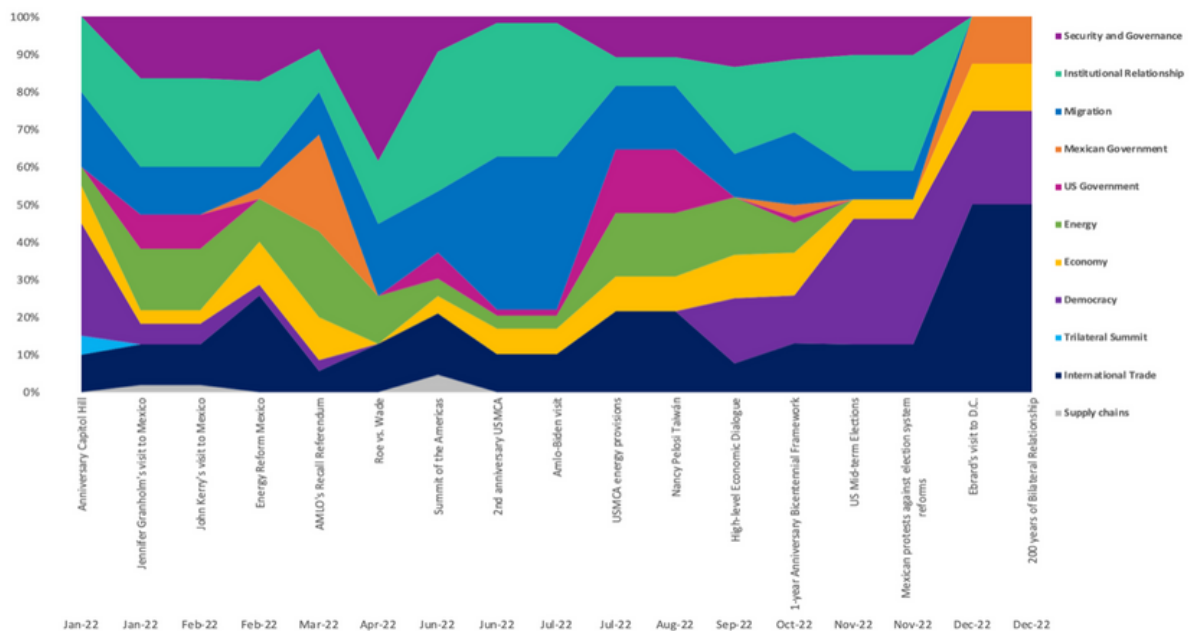
Source: USMF-IMCO with data collected from Think Tank's websites.

1. COMEXI'S publishing methodology is different from other Think Tanks. Its staff is composed by a network of contacts called press associates, who publish in various media, such as newspapers, websites, among others, and COMEXI publishes them on its website. Therefore, it achieves a higher number of publications than other centers.

TOPICS AND CURRENT AFFAIRS

Most of the Think Tanks' publications are related to current events within the bilateral agenda. Figure 5 presents the most significant events of 2022 regarding the bilateral agenda on the x-axis and the topics addressed in the publications related to each event on the y-axis. This graph provides insights into the topics addressed by the Think Tanks in response to each event. For instance, the graph shows that international trade was the main topic discussed during the events commemorating the 200 years of the Bilateral Relationship in December 2022. Additionally, it highlights that the Mexican protests against the electoral system reforms in November 2022 resulted in publications regarding democracy and institutional relationships. This graph helps us understand the specific issues that Think Tanks analyzed in connection with each event.

Figure 5. Relevant short-term events for the bilateral relationship vs. percentage of publications of selected topics



Source: USMF-IMCO with data collected from Think Tank's websites.

III. CONTENT ANALYSIS

Extensive text analysis was conducted using programming in R to examine the three most frequently discussed topics of 2022. The analysis reviewed over 300,000 words from the published texts to better understand the discourse surrounding these topics. The topics that were mentioned the most were Institutional Relationship, Migration, and International Trade, adding 223 publications of the 543 published in 2022.

Table 3. Number of publications for the top 3 topics

Topic	No. of Publications
Institutional Relationship	102
Migration	66
International Trade	56

Source: USMF-IMCO with data collected from Think Tank’s websites.

A) INSTITUTIONAL RELATIONSHIP

This topic refers to policies, encounters, and events with the focus on strengthening the bilateral relationship. Although it appears to include a variety of topics, the institutional relationship focuses specifically on steps taken by governments, in some cases accompanied by private and public sectors, the academic sector, and NGOs, to promote the bilateral agenda.

Institutional Relationship and relevant events

The topic’s appearance throughout the year was constant; however, there were months with more publications than others due to particular events on the agenda.

- **January 21st:** U.S. Secretary of Energy, Jennifer Granholm’s visited Mexico to address the proposed energy reforms in Mexico.
- **May and June:** Publications mainly analyzed America’s Summit which happened from June 6th to June 10th and President AMLO’s decision not to assist.

Figure 9 shows word combinations found in the publications regarding Migration. The combinations include different topics due to migration's intersectional character. Topics such as human rights, security, legal documents, public health care, and poverty are relevant to the day-to-day life of immigrants. Although Title 42 does not appear as a word combination, it was and continues to be a central issue within the migration topic and is involved in the border crisis, in the border protection protocols, the migrant protection, among other phrases stated in the next figure.

Title 42 was established in March 2020 by the Trump administration to reduce the crossings during the sanitary crisis. Title 42 allows border officers to expel migrants seeking for asylum.⁴ At the beginning of 2020, the Biden administration announced they were going to remove it; however, in May 2022, a Judge in Alabama stopped its abolishment.⁵ Today, Title 42 is still in place, and the number of border encounters are at its highest with 206,239 recorded in November 2022.⁶

Additionally, measures such as the “Remain in Mexico” program and the Temporary Protected Status (TPS) program were key to understand the evolution of migration during 2022. Additionally, in the context of the U.S. mid-term elections held on November 8th, migration remained an electoral subject, especially with Republican candidates, who consider migration among their top issues.⁷ Due to the number of crossings, its political relevance, and the recent programs, migration is expected to continue in the most mentioned topics of the bilateral relationship.

4. Pew Research Center, KEY FACTS ABOUT TITLE 42, THE PANDEMIC POLICY THAT HAS RESHAPED IMMIGRATION ENFORCEMENT AT U.S.-MEXICO BORDER, John Gramlich

5. COMEXI, TÍTULO 42: OBSTÁCULO O FACILITADOR, Rafael Fernández de Castro

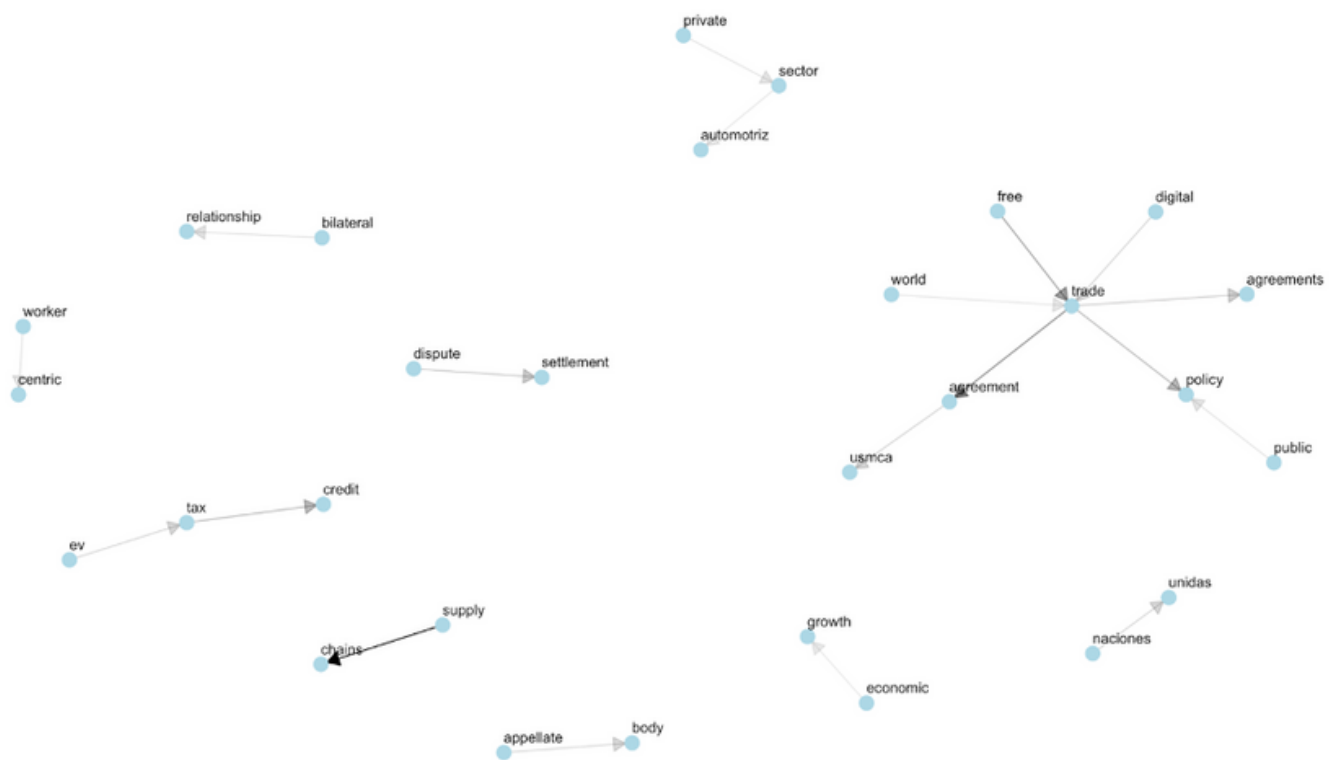
6. Pew Research Center, MONTHLY ENCOUNTERS WITH MIGRANTS AT U.S.-MEXICO BORDER REMAIN NEAR RECORD HIGHS, John Gramlich

7. AS/COA, EXPLAINER: U.S. IMMIGRATION POLICIES AND THEIR IMPACT ON LATIN AMERICANS, Chase Harrison, Jennifer Vilcarino, Carin Zissis

Bilateral X-Ray

Furthermore, several USMCA disputes took place during 2022, regarding to the rules of origin in the automotive sector,⁹ which was solved in January 2023 in favor of Mexico and Canada. The Mexican government's decision regarding the energy sector which have affected U.S. energy companies in favor of the public enterprise CFE (Comisión Federal de Electricidad) and State oil enterprise PEMEX (Petróleos Mexicanos)¹⁰ was also disputed; as was the prohibition of importation of genetically modified corn in Mexico.¹¹ Two of them are ongoing disputes which will continue to be emphasized in the category of international trade.

Figure 11. Most common word combinations in the publications regarding the topic of International Trade



Source: USMF-IMCO with data collected from Think Tank's websites.

9. IMCO, EL FALLO A FAVOR DE MÉXICO Y CANADÁ SOBRE LAS REGLAS DE ORIGEN DEL SECTOR AUTOMOTRIZ PROTEGE LA COMPETITIVIDAD DE LA REGIÓN, IMCO Staff
 10. IMCO, ESTADOS UNIDOS SOLICITA CONSULTAS CON MÉXICO PARA DIALOGAR SOBRE SU POLÍTICA ENERGÉTICA EN EL MARCO DEL T-MEC, IMCO Staff
 11. IMCO, COMIENZAN CONSULTAS POR RESTRICCIÓN A LA IMPORTACIÓN DE MAÍZ AMARILLO, IMCO Staff

IV. OPPORTUNITIES

Based on our research, we found that Think Tanks tend to publish notes that are focused on current events. However, not all of these publications provide a thorough analysis. Additionally, while some Think Tanks consistently address certain issues in the bilateral relationship, there is a noticeable gap in publications that address long-term agendas. These topics may be only superficially addressed or not even appear in publications at all. Therefore, we see an opportunity for improvement by accompanying published topics with recommendations and analyses that propose possible solutions to the issues at hand. This would help to address the lack of comprehensive analysis in current event publications and bridge the gap in addressing long-term agendas.

These five issues are among those that could be addressed more in-depth in the publications:

1. Specific Possibilities of Ally-Shoring

Nearshoring is mainly addressed in relation to the supply chains. However, it is important to address it alone. This emphasis could result in a mapping of the specific opportunities in which ally-shoring could benefit both countries. Ally-shoring represents a huge step towards economic development for North America as a region. The global geopolitical context is currently providing a great opportunity for a bilateral relationship; however, if it is not addressed as a strategy for nearshoring, the possibilities can be limited.

2. Border Development

Migration always appears in the most mentioned topics, and it involves issues such as migratory laws, asylum seekers, migratory status, patrol controls; however, the topic of border development is not frequently addressed. Because the border between Mexico and the United States has the highest number of crossings in the world, Think Tanks could be proposing strategies to promote its efficiency. A recent publication by the Atlantic Council and the Hunt Institute reveals a 10-minute reduction in waiting times could translate into a \$2.2 billion increase in GDP in Mexico's six border states.¹² Documents like these could foster a better understanding of the importance of investment in the U.S.-Mexico border.

¹². Atlantic Council, Hunt Institute, and El Colegio de la Frontera (2023), THE TRANSFORMATIVE POWER OF REDUCED WAIT TIMES AT THE US-MEXICO BORDER.

3. USMCA Opportunities

The USMCA is one of the most frequently discussed topics within the broader field of International Trade. However, most publications tend to focus on missed opportunities, disputes, or incorrect implementation. Unfortunately, these analyses often lack a more positive and assertive approach that highlights the potential benefits that could be gained by both the U.S. and Mexico through collaboration. By emphasizing the many opportunities for mutual gain, including enhanced regional competitiveness and economic development, these publications could help foster a more constructive and productive dialogue between the two countries.

4. Emphasis on the Agricultural Sector

The United States is Mexico's number one agricultural partner regarding its imports, representing 70% of Mexico's market share; also, Mexico represents the third agricultural partner for the United States.¹³ The focus on agriculture should not be missed, especially with President Lopez Obrador's latest proposals to diversify its agricultural exports. Although agriculture might seem like a secure sector, policies might alter this certainty which has been maintained for a long time. In 2022, none of the analyzed publications addressed this topic on its own. Thus, we encourage Think Tanks to consider it and address it.

5. Comprehensive Approach to the Bilateral Relationship

The bilateral relationship encompasses an assemblage of issues, which are commonly divided by the analyzed topics above. However, publications that intend to accomplish a more comprehensive analysis of the events could be helpful. This could show the complexity of the bilateral relationship and the need to approach it as an overall phenomenon in order to see how its multiple agents and actions have constant effects on each other.

¹³. International Trade Administration (2022), AGRICULTURE

V. CONCLUSION

The document has provided a comprehensive analysis of the main topics addressed by Think Tanks with regards to the bilateral relationship between Mexico and the United States. In 2022, the most frequently discussed topics were Institutional Relationship, Migration, and International Trade, accounting for 223 out of 543 publications. The document also identifies the most active organizations and their areas of expertise, as well as the keywords and phrases commonly used by Think Tanks in relation to the most relevant topics. Finally, it identifies the key issues that have not been addressed in publications and suggests potential research opportunities for Think Tanks to pursue in order to provide recommendations for the bilateral relationship.

However, it is important to recognize that other factors beyond the topics covered by Think Tanks will continue to shape the bilateral relationship between Mexico and the United States. For instance, the political landscape in both countries may have an impact on the relationship. In Mexico, the 2024 presidential election will be a critical event that could potentially shift the country's foreign policy priorities. Meanwhile, the outcome of the United States presidential election in the same year could also bring significant changes in its political landscape.

Furthermore, the COVID-19 pandemic and its aftermath have played a significant role in shaping the relationship. The pandemic has highlighted the importance of international cooperation, and both countries need to work together to address public health and economic issues. In addition, climate change and environmental concerns will remain pressing issues that require both countries to collaborate.

In conclusion, while Think Tanks have provided valuable insights, a gap still exists in long-term strategic analysis that needs to be addressed. Going forward, analysts must consider not only the short-term events but also the broader political, economic, and social forces that will shape the future of the bilateral relationship between Mexico and the United States. It is crucial to recognize that the relationship remains essential, and the events of 2022 have shown that there is a continued need for in-depth analysis of this relationship.

VI. ANNEX

Annex A: Think Tanks

Think Tanks consulted for the monthly reports:

The Think Tanks included were chosen by the USMF and IMCO at the beginning of the project. A list was compiled and based on their importance, focus and affinity in terms of the bilateral relationship, it was decided which of these would be monitored. Some Think Tanks have been added throughout the year because the team considered it pertinent and optimal to the project.

United States:

American Enterprise Institute (AEI), Americas Society/Council of the Americas (AS/COA), Atlantic Council AALAC, Baker Institute, Brookings, Bush Center, Center for American Progress (CAP), Center for International Development (CID), Center for U.S.-Mexican Studies at UCSD (USMEX), Council on Foreign Relations (CFR), Center for Strategic and International Studies (CSIS), Federal Reserve Bank of Dallas, Harvard Growth Lab, Heritage Foundation, Hudson Institute, Mexico Institute, Peterson Institute for International Economics (PIIE), Pew Research Center, The Dialogue.

Mexico:

Aspen Institute México, Centro de Estudios Espinosa Yglesias (CEEY), Centro de Investigación y Docencia Económicas (CIDE), Colegio de México (COLMEX), Consejo Mexicano de Asuntos Internacionales (COMEXI), Fundación Idea, Fundar, Instituto Mexicano para la Competitividad (IMCO), México Evalúa, México, ¿cómo vamos?, The Coppel-Intuit Center for Binational Institutions.

Annex B: Methodology

- The compilation of publications was carried out from the Think Tanks main websites as well as Think Tanks blog sites.
- The notes were classified into general topics based on their content.
- On each publication URLs, a web scraping was done of the HTML code, from where all the texts included in the portal were obtained.
- Graphics and text analysis were performed in Excel and R software.