



CORRIDOR

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DATA THROUGH AUG 2026

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GOVERNABILITY POCKETS

Where governability actually lives.

Mexico's security story is usually told by its worst places. This issue measures the opposite: the cities whose numbers are anomalously good for their surroundings — and whether those numbers can be trusted. We built a published, reproducible rule with three layers: crime rates against a 45-metro cohort, disappearances in both trend and level, and perception. Two metros pass. One border city with a quiet registry is rejected by the rule itself. And the author's home metro — the case that inspired the concept — fails the screen on 2026 data, which is printed here exactly as it fell.

2 of 45

Metros above 400,000 inhabitants that pass the full Governability Pocket rule on Jan–Aug 2026 data: Mérida and La Laguna

27.7

Disappeared persons per 100k in Nuevo Laredo, 2022–25 average — the cohort median is 9.9. A quiet crime registry is not certified when this series is loud

+13.5%

National extortion, Jan–Aug year-on-year on the comparable basis. The narrow reading says –2.5%. Both are printed inside

Built entirely from public official sources. Every figure carries its source and its date. Where two official series contradict each other, the contradiction is published rather than resolved by picking the convenient one.

01

The concept — and the rule that disciplines it

The Framework describes Mexico as an archipelago economy: functional enclaves in a sea of criminal taxation. If that is right, the enclaves should be measurable. A Governability Pocket is a city or functional conurbation whose security outcomes are anomalously good for its surroundings, where the explanation can be traced to working institutions rather than to a registry that stopped counting or a criminal monopoly that no longer needs to fight.

The distinction matters because low numbers have three very different causes. Institutions can work. Victims can stop reporting. Or one criminal organization can win. A publication that celebrates low counts without separating the three is marketing, not analysis — and our own charts (No. 13, No. 15) have argued that a registry that stops counting looks exactly like peace. So the rule has three layers, and all three are published.

THE CERTIFICATION RULE – V1.2, LOCKED BEFORE THIS RUN

Cohort. The 45 metropolitan areas above 400,000 inhabitants in the official *Metrópolis de México 2020* catalog (CONAPO–SEDATU–INEGI), census-2020 denominators. One declared sub-zone: the southern-Tamaulipas conurbation (Tampico–Madero–Altamira) excludes Pánuco and Pueblo Viejo, two Veracruz municipalities the official delimitation attaches to it — declared before this run, and the official-boundary result is disclosed below.

Layer 1 — crime screen. Six SESNSP series, January–August 2026, annualized rates per 100k. A metro passes with 4 of 6: homicide, extortion, vehicle theft and business robbery at or below the cohort's 25th percentile; kidnapping and cargo robbery below an absolute 0.2 per 100k, because half the cohort sits at exactly zero and a percentile there is a knife's edge. The metro's homicide count in 2025 must also not exceed its 2015 count.

Layer 2 — disappearances, twice. The series almost nobody publishes is where silence hides. Trend: the 2022–25 average of disappeared-not-located persons must not exceed 1.15× the 2015–18 average. Level: that same average, per 100k, must sit at or below the cohort median — 9.9 per 100k on current data. A city cannot be certified from the top half of its own cohort's disappearance distribution, however clean its crime registry looks.

Layer 3 — perception. ENSU (INEGI, quarterly): the share of adults who feel their city is unsafe must be consistent with the registry, not contradict it. Used as an affirmative check on the certified, and printed for every case.

GOVERNABILITY POCKETS – THE JAN-AUG 2026 RUN



Cohort: 45 metros above 400k. The remaining 37 pass no layer of the rule and are not shown. Metro positions schematic.

The Jan-Aug 2026 run of the certification rule, cohort of 45 metros above 400,000 (Metrópolis de México 2020). The remaining 37 metros pass no layer of the rule and are not shown. Metro positions schematic; state boundaries simplified, for orientation.

The rule was locked before the definitive run. What follows is what came out — including the result we did not want.

Disclosure. The author founded and has directed since 2014 the citizen public-security observatory of the Tampico–Madero–Altamira metropolitan area (OCTMA), one of the candidate metros examined below. OCTMA is a non-commercial civic body; CORRIDOR uses only public official sources, reproduces no observatory material and receives no data from it. That relationship is precisely why the rule is mechanical: exclusion and certification happen by printed criteria, never by editorial preference. Section 05 shows the discipline in action.

02

The certified: Mérida and La Laguna

Two metros pass all three layers on January–August 2026 data.

Mérida — the clean pocket

The only 6-of-6 in the cohort, and it is not close. Annualized rates per 100k: homicide 0.45 against a cohort 25th percentile of 2.83; extortion 0.34 against 1.43; vehicle theft 5.8 against 37.3; business robbery 10.0 against 28.3; zero kidnapping files and zero cargo-robbery files in eight months. Disappearances: 0.9 per 100k on the 2022–25 average — one-eleventh of the cohort median — and flat against 2015–18 (11 to 12 per year). Perception is the one imperfection: 38.2% of adults felt the city unsafe in June 2026, up from 33.7% in March, against a national urban figure of 59.8%. Still among the country’s lowest, but moving the wrong way — worth one line in every future cut.

La Laguna — the rebuilt pocket

Torreón, Gómez Palacio and Lerdo tell the harder story: this was one of Mexico’s most violent regions in the early 2010s. On 2026 data the conurbation passes 5 of 6 — homicide 2.29, vehicle theft 10.1, business robbery 27.8, zero kidnapping, cargo robbery 0.11 — failing only extortion (2.07 against the 1.43 percentile). The decade line: 173 homicide files in 2015, 25 in 2025. Disappearances 2.0 per 100k, flat (26 to 28). Perception: 22.5% in Torreón proper in June 2026 — among the three or four lowest ENSU readings in Mexico — and 28.1% for the wider urban area. Where Mérida never fell, La Laguna fell and climbed back; the institutional chapter of that climb — a business community that funded and audited its own security institutions — is the mechanism this series will document in a dedicated piece.

The two certified pockets share one feature no excluded city has: every layer agrees. Low registry, low disappearances in trend and level, low perception. When the three point the same way, the silence is signal.

03

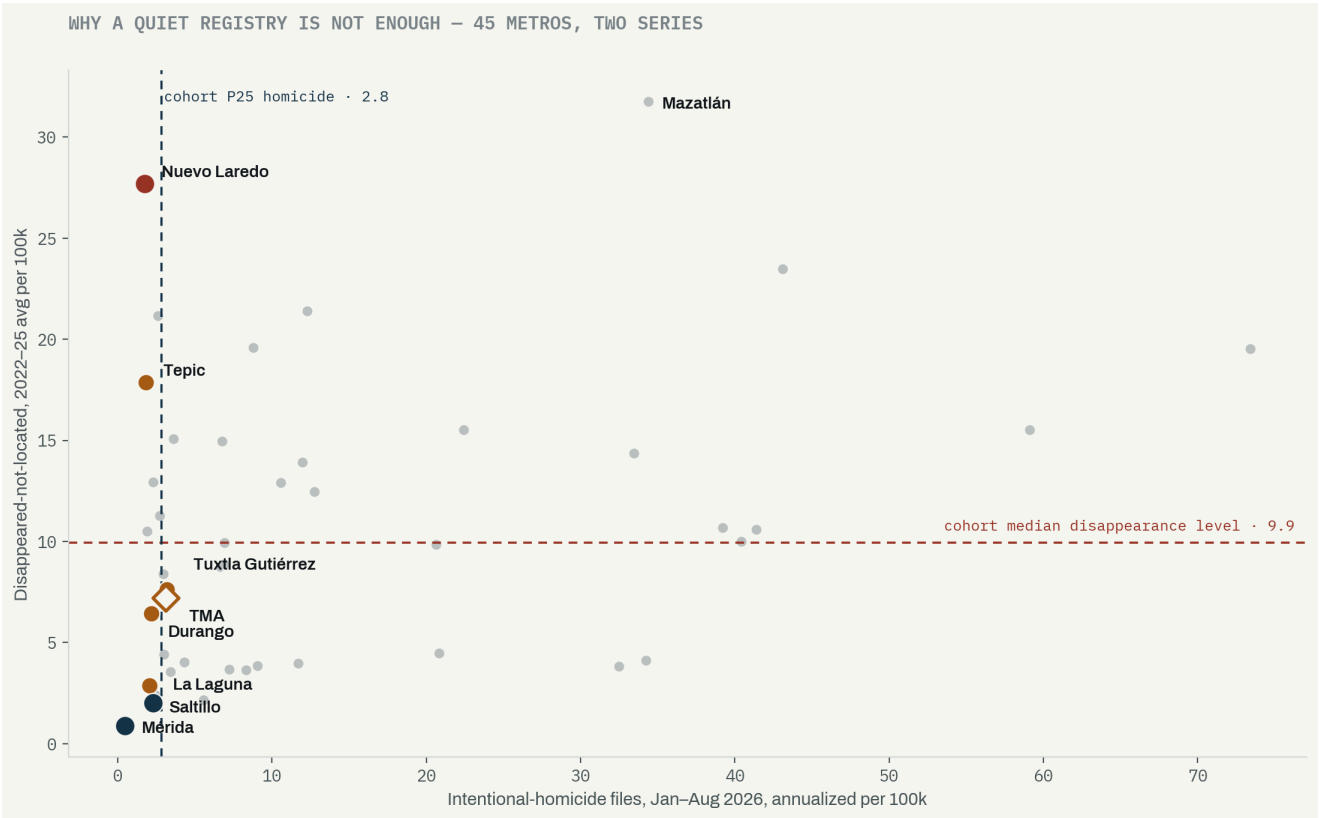
The negative control: Nuevo Laredo

Nuevo Laredo is why the rule has a level criterion — and why this issue prints a case that passes the crime screen and is rejected anyway.

On the registry, the numbers look like a pocket: 5 of 6 on the crime screen, homicide at 1.76 per 100k, extortion at 0.35, zero kidnapping files. On perception, remarkably, it also looks calm: 26.5% felt the city unsafe in June 2026 — lower than Tampico. A two-layer rule would certify it.

The third series refuses. Nuevo Laredo’s disappeared-not-located average for 2022–25 runs at 27.7 per 100k — the second-highest level in the 45-metro cohort, nearly three times the median, in a border city of 425,000. The trend criterion alone would pass it (the registry counts fewer entries than in 2015–18); the level criterion excludes it by rule.

That is the analytical point of this issue, stated once and plainly: neither the crime registry nor perception captures disappearance risk. A city can post low files, feel calm to its residents, and still be a place where people vanish at three times the cohort median. The quiet of the registry is not governability. The series almost nobody publishes is the one that tells them apart — which is exactly why CORRIDOR added it to the standing basket in Issue No. 2.



Each dot is one of the 45 cohort metros. Horizontal axis: SESNSP intentional-homicide files Jan-Aug 2026, annualized per 100k. Vertical axis: disappeared-not-located persons, 2022–25 average per 100k (RNPDO via Escobar et al. 2026). Nuevo Laredo sits left of the homicide percentile and far above the disappearance median — the quadrant the rule exists to reject.

04

Excluded by divergence: four quiet registries

Four metros pass the crime screen but fail the disappearance trend test — their 2022–25 average diverges more than 15% above their 2015–18 base.

Metro	Crime screen	Disap. 2015–18 → 2022–25 (avg/yr)	Level/100k	ENSU Jun-26
Saltillo	5 of 6	4 → 30	2.9	16.9%
Tuxtla Gutiérrez	5 of 6	6 → 65	7.6	70.6%
Durango	4 of 6	20 → 44	6.4	44.0%
Tepic	4 of 6	diverging	17.9	—

Crime screen on SESNSP Jan-Aug 2026, annualized, cohort of 45 metros $\geq 400k$. Disappearances: RNPDO municipal series by year of occurrence, via Escobar, Reyes-Guzmán & Sánchez Ruiz 2026, Data in Brief. ENSU: INEGI, June 2026; Tepic is reported at state grain in the bulletin used here and is left blank rather than approximated.

Two readings. Saltillo is the nearest miss: an elite crime registry, a low disappearance level, the best perception figure in the country — and a disappearance count that moved from 4 to 30 a year. It is the first candidate to re-enter if that series stabilizes. Tuxtla Gutiérrez is the opposite pole and the best argument for layered rules: it passes the crime screen while 70.6% of its residents call the city unsafe and its disappearance count went from 6 to 65. There, the registry is the outlier — everything else says pressure.

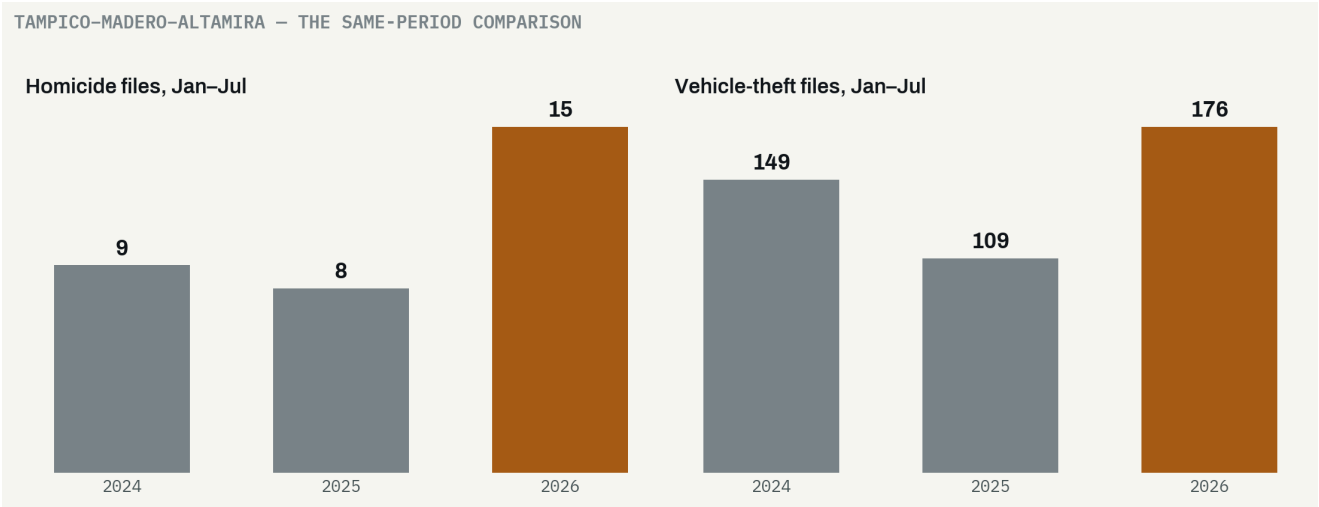
05

A pocket under strain: Tampico–Madero–Altamira

This is the chapter this publication did not want to write, and the one that proves the method. The southern-Tamaulipas conurbation is the case that inspired the Governability Pockets concept: a metro that went from one of Mexico’s most dangerous to years without a registered kidnapping. On the preliminary run — 2025 annual data — it passed the screen at 4 of 6. On the definitive January–August 2026 run it drops to 2 of 6 and is not certified.

What broke, in order of honesty:

Its own registry deteriorated — and the deterioration predates this cut. Homicide files, same-period comparison: 8 in January–July 2025, 15 in January–July 2026; 16 through August, against 14 in all of 2025. Vehicle theft: 109 to 176 same-period, +61%; the eight-month 2026 count already equals the full-year 2025 count. Business robbery: 166 to 176 same-period, with 43 files in August alone. This was visible at the July cut; August confirmed it.



SESNP municipal database, August 2026 cut; Tampico + Ciudad Madero + Altamira, files opened January–July of each year — the same-period comparison that isolates the 2026 shift from the incomplete year.

The cohort improved while TMA slipped. National homicide on the comparable basis is down 17.6% year-on-year; the cohort’s homicide 25th percentile fell from 4.7 to 2.8. Two of TMA’s four failures are razor-thin — vehicle theft by 0.29 per 100k, extortion by 0.12, and its extortion count actually fell (12 completed files to 6); that one fails only because the bar moved. But homicide and business robbery fail with room to spare, and a rule that bends for a near-miss is not a rule.

What holds. Zero kidnapping files and zero cargo-robbery files in eight months — the decade lines (homicide 72→14 annual to 2025, kidnapping 40→0) remain real. Disappearance level 7.2 per 100k, below the cohort median; trend non-diverging. Perception 28.4%, unchanged, far below the national 59.8%. This is not a collapse. It is a strained pocket: the institutional floor is intact while the 2026 crime lines move the wrong way.

The watchlist for the next cuts, printed in advance: TMA’s homicide and vehicle-theft lines against the cohort percentile, monthly. If they return under the bar, certification returns by the same mechanical rule that withheld it. Nothing about this case will be resolved editorially.

For the record: the author’s civic work is in this metro. The rule was locked on 21 September; the definitive run was executed once; the result is printed as computed. A certification rule that cannot fail its author’s home city would not be worth reading.

06

The Risk Outlook — the August print

The standing section: national dual readings, the Conflict-Axis Monitor recalculated on the August cut, the revisions the source made to already- published months, and the labor line with its denominator.

National, January–August, both readings

Series	2015	2025	2026 (c / c+t)	yoy (c)	yoy (c+t)
Extortion	4,081	7,370	7,188 / 8,362	−2.5%	+13.5%
Intentional homicide	10,593	14,247	10,115 / 11,734	−29.0%	−17.6%
Business robbery	55,941	45,057	42,539	−5.6%	—
Cargo robbery	4,458	4,066	3,233	−20.5%	—
Vehicle theft	105,730	78,134	64,779	−17.1%	—
Kidnapping	705	307	262	−14.7%	—

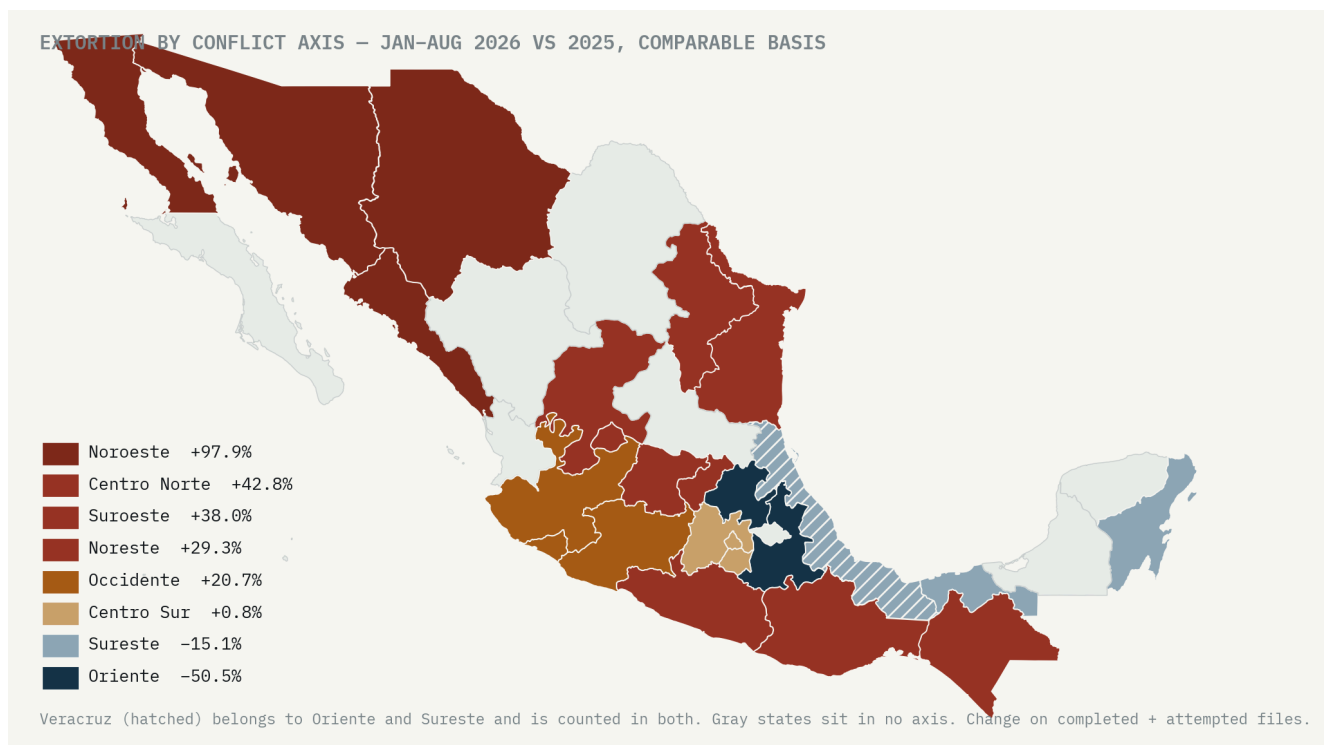
SESNAP municipal database, August 2026 cut (published 18-Sep-2026). Investigation files opened Jan-Aug; a floor on true incidence, not a measurement. c = completed; c+t = completed plus attempted.

With August inside, the extortion headline changes sign with the definition: -2.5% on completed files alone, +13.5% on the basis comparable with the historical series. This issue ratifies the comparable basis for both series that the 2026 registry split: the 2015-2025 methodology separated attempts in neither extortion nor homicide, so completed-plus-attempted is the like-for-like reading for both, and it is now the house headline — with the narrow reading always printed beside it. August alone: 1,113 completed homicide files, the lowest August in the 2015-2026 series under both readings; extortion in August +6.3% completed, +25.7% comparable.

The Conflict-Axis Monitor, August cut

Extortion by axis	2015	2025	2026 (c / c+t)	vs 2025 (c+t)	vs 2015 (c)
Centro Norte · Gto, Qro, Zac, Agu	90	1,157	1,371 / 1,652	+42.8%	+1,423%
Noreste · Tamps, NL	451	728	918 / 941	+29.3%	+103.5%
Noroeste · BC, Sin, Son, Chih	247	189	354 / 374	+97.9%	+43.3%
Centro Sur · CDMX, Méx, Mor	1,649	3,090	2,767 / 3,115	+0.8%	+67.8%
Occidente · Jal, Mich, Col	624	556	538 / 671	+20.7%	-13.8%
Suroeste · Gro, Oax, Chis	258	205	196 / 283	+38.0%	-24.0%
Sureste · Ver, Tab, Q Roo	281	836	541 / 710	-15.1%	+92.5%
Oriente · Pue, Hgo, Ver	297	895	422 / 443	-50.5%	+42.1%

Files opened Jan-Aug; axis composition as assessed in Vázquez Rossainz, *Agenda Nacional de Peligros y Riesgos – México 2026*; Veracruz belongs to Oriente and Sureste and is counted in both, disclosed. Change now read on the comparable basis (c+t) for extortion and homicide alike – methodological note above.



Extortion files opened Jan-Aug, 2026 vs 2025 on the comparable basis (completed + attempted), by conflict axis. Axis composition as assessed in Vázquez Rossainz, *Agenda Nacional de Peligros y Riesgos – México 2026*; Veracruz (hatched) belongs to Oriente and Sureste. Gray states sit in no axis. State boundaries simplified, for orientation.

What moved since July: the Noreste accelerates to +29.3% and is now the third- fastest rising axis; the Centro Norte grinds on (+42.8% comparable, fifteen times its 2015 level); the Noroeste's jump holds a second month (+97.9%) and is no longer a one-month artifact. Homicide falls on the comparable basis in all eight axes — from -6.1% (Centro Sur) to -42.2% (Noreste) — an average that still describes nobody. Cargo robbery keeps its inverted geography: 76% of it in two central axes while the exporting Noreste sits at -93% versus 2015; the two rises are Sureste +54.7% and Noroeste +42.3%, both from low bases.

The source revised its own past — mostly by reclassification

Cell-by-cell comparison of the August cut against the July cut, for our six series: the national Jan–Jul totals moved by +8 homicide files, +7 completed extortion, +9 attempted extortion, +2 business robbery, +2 kidnapping. The revision that matters is not the level. Michoacán moved 25 extortion files from completed to attempted; Mexico City moved 24 the other way. Combined totals barely moved — which side of the dual reading each file lands on did. Had CORRIDOR published completed-only headlines, Michoacán would have “improved” 10% in one cut without anything happening in Michoacán. Two already-published figures shifted: Chart No. 8’s Centro Norte Jan–Jul aggregate is now 1,239 (was 1,237) — a revision note now sits on the chart’s page rather than a silent re-edit — and Chart No. 19’s attempted count moved from 24 to 28.

The labor line, with its denominator

The IMSS registry set an August record: 22,798,473 formal posts, +343,556 in twelve months. Per house rule, the denominator prints with it: Mexico has 60.8 million employed persons (ENOE, July), so the record registry covers 37% of employment; 34.1 million people — 56.2% — work in labor informality. The same twelve months: total employment +45,352, labor participation from 60.2% to 59.2%, 1.7 million more people outside the labor force, critical occupation conditions from 37.3% to 38.9% — roughly 23.6 million people, more than the entire IMSS registry. The formal count is the audited fraction, not the economy.

PROMISES FROM ISSUE NO. 2 — STATUS

Delivered in this issue: the August print (first monthly recalculation of the full basket); the Monitor’s first re-run — the new cut reproduced every previously published table at zero discrepancies before updating it; and the revisions audit above. Carried to Issue No. 4: the investment-tracker IMSS employment test (municipality-resolved entries need one more IMSS monthly cut to cover the cohort window) and the 2026 disappearance series from the reopened RNPDO portal, which requires a manual consultation the schedule did not allow this month. Both remain on the record.