

Mexico Tech *Talent Ecosystem*

Engineering intelligence for leaders building distributed teams

Why Mexico, in four numbers this report defends. Seven to eight business hours of overlap with the US working day across the year. A measurable senior talent tier, supported by 10,246 verified salary responses across 36 roles and 32 states. Engineers who stay eighteen to twenty-four months, against a two-year average at large US tech employers. And eleven years of placement experience in Mexico, supported by six published engagement case studies.

What this report does not argue. Mexico is not the lowest hourly rate available, and nothing here carries a market-wide savings percentage. What follows is the market as the data describes it: ecosystem composition, compensation by role and seniority, scale economics, and the engagement terms procurement will ask about.

Compensation data · Mexico Tech Salaries Report 2026 · 10,246 verified responses · 36 roles · 32 states

1.56M

People trained in computer science and IT — INEGI, ENOE Q2 2022

7–8 h

Business hours of US-timezone overlap, year-round

45,000 · 300

Professionals in the CodersLink pool, and those meeting the Top 1% Standard

Mexico Engineering Market — Structure, Pipeline, Cost.

Mexico's engineering market has differentiated into distinct city-level ecosystems with separate specialisation profiles. This chapter establishes the baselines the rest of the report builds on: how large the talent base actually is, the STEM pipeline feeding it, and the labour market it sits inside.

Compensation data source. All salary benchmarks and skill premiums in this report come from the Mexico Tech Salaries Report 2026 — the largest engineering compensation dataset in Mexico, built from 10,246 verified responses across 36 roles and 32 states.

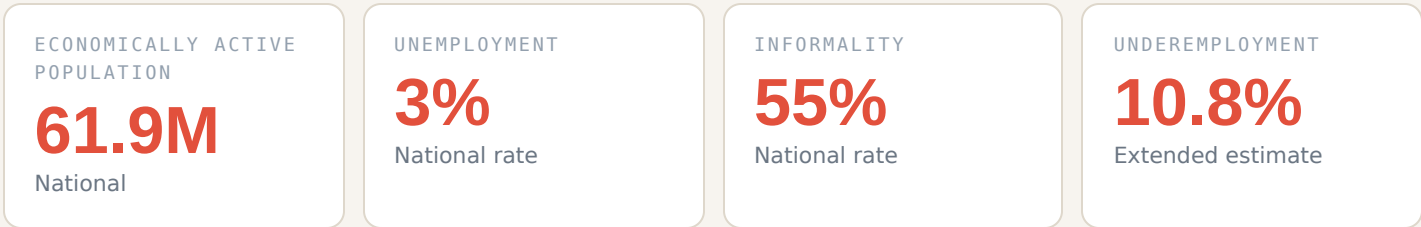
The talent base, counted three ways

One number cannot answer every question about the size of this market. These three come from the same INEGI release and each answers a different one.



INEGI, comunicado 509/22 (ENOE Q2 2022). The headline figure counts training, not employment.

Real labour market context



ENOE / INEGI 2025–2026. National context; not engineering-specific.

Senior Engineering Reality at Scale.

The most consistent enterprise objection to distributed Mexico engineering is not cost — it is whether Staff, Principal and engineering leadership talent exists in enough depth to support multi-year, multi-team operations. Two things answer it: what the market pays for those roles, and at what sample.

The senior end of the market is populated, and it is priced

ROLE	MEDIAN NET USD/MO	25TH-75TH PCT	N	CONFIDENCE
Engineering Manager	4,956	4,437 – 5,925	142	High
Solution Architect	4,904	3,881 – 6,092	291	High
Security Architect	4,143	3,866 – 4,371	45	Directional
Site Reliability Engineer	4,029	3,453 – 4,961	255	High
DevOps Engineer	3,772	3,083 – 4,726	370	High

Mexico Tech Salaries Report 2026, Appendix A. A market that pays these bands, at this sample, is one where the career ladder above senior already exists.

Retention, Read as a Cost Question.

The useful question is not who retains best. It is what you are replacing, what this market delivers against it, and what moves the number once you are here.

WHAT YOU ARE REPLACING

2 years

Average tenure for software engineers at large US tech companies. The US tech sector overall runs two to three years, against 4.1 for US workers of any kind.

WHAT PLACEMENTS HERE RUN

18–24 mo

Average tenure of engineers placed by CodersLink, at 15% voluntary turnover, measured from placement rather than from a steady-state workforce.

WHERE THE CEILING SITS

88%

Twelve-month retention of the engineering function, the highest of any function in tech for a second year. Ravio, October 2025, European tech.

Three different denominators, and the difference matters. The first figure counts everyone in a job. The second counts only engineers from their first day on a new team, where attrition is always highest. The third counts a whole function at steady state, in another continent. They are not a ranking, and reading them as one produces the wrong decision.

The comparison that actually decides it. Not our turnover against a European function benchmark — your current attrition, on your current team, against the same roles built here. At parity on tenure the case rests on cost and on time zone. Above parity it rests on retention infrastructure, which is a property of the hub you pick: the ecosystems in this report range from 6.1 to 9.1 on retention potential, and that spread is wider than any difference between the benchmarks above.

Bureau of Labor Statistics Employee Tenure Survey 2024; Centum Search Tech Tenure Report 2024; Ravio Compensation Trends Report, October 2025. Tech industry averages of 82–87% retention appear in Bucketlist 2025 and the Mercer Tech Talent Retention Report.

City-by-City Deep Dive.

Seven ecosystems, each read on its own terms: what the employer base looks like, what it is good at, and what it costs you to build there.

Guadalajara

JALISCO

1,787 startups (Crunchbase) · home of Talent Land, the largest tech conference in Latin America · fastest-growing engineering ecosystem in Mexico

STRENGTHS

- Strong startup ecosystem
- Excellent scalability
- Strong cloud and product engineering
- Balanced compensation pressure
- Best QA engineering concentration
- Fastest-growing ecosystem (+89.9%, 2021-25)
- Cost efficiency leader
- Strong retention potential

CONSTRAINTS

- Increasing competition pressure
- Growing salary inflation
- Smaller AI talent pool than CDMX

Positioning. Strongest overall balance: engineering quality, retention, scalability and cost efficiency.

Monterrey

NUEVO LEÓN

50,000 tech specialists · 2,236 startups (Crunchbase) · 112% workforce growth, the fastest in Latin America (CBRE, Scoring Tech Talent 2025) · 70% of Mexico's nearshoring FDI flows here

STRENGTHS

- Highest English proficiency in Mexico (EF 532)
- Enterprise engineering maturity
- Industrial and manufacturing tech leadership
- Strongest US operational alignment
- Cloud and data engineering ecosystem
- Strongest distributed-readiness score

CONSTRAINTS

- Smaller talent pool
- Higher operational costs
- Strong corporate hiring competition
- Lower retention potential

Positioning. Distributed-readiness leader — strongest fit for enterprise-oriented distributed engineering organisations.

CODERSLINK RESEARCH · 2026

CHAPTER 02 · ECOSYSTEM ANALYSIS

Mexico City

CDMX

300,000+ tech specialists · 34,034 startups (Crunchbase) · largest engineering supply in Mexico (Revelo 2026)

STRENGTHS

- Largest engineering supply
- Strongest AI and startup density
- Fintech leadership nationwide
- Product engineering maturity
- Highest international exposure
- 25% of national STEM enrolment, with Estado de México

CONSTRAINTS

- Highest recruiter saturation (9.4)
- Highest compensation inflation
- Strongest hiring competition
- Lowest cost efficiency (5.9)
- Lowest retention potential (6.1)

Positioning. Deepest and most sophisticated ecosystem — highest competition, highest specialisation.

Querétaro

BAJÍO

863 startups (Crunchbase) · Bajío aerospace and hyperscaler corridor · home to Google Cloud and AWS regional infrastructure

STRENGTHS

- Hyperscaler infrastructure hub (Google Cloud, AWS)
- Strong retention potential
- Good cost efficiency
- Cloud and DevOps specialisation
- Low hiring pressure relative to market
- Growing AI infrastructure investment

CONSTRAINTS

- Smaller talent pool overall
- Less enterprise software maturity
- Developing distributed-work ecosystem

Positioning. Mexico's emerging infrastructure hub — watch for acceleration driven by cloud and AI investment.

Mérida

YUCATÁN

STRENGTHS

- Highest retention potential (9.1)
- Best cost efficiency (9.3)
- Lowest hiring pressure (4.8)
- Excellent for distributed team building
- Emerging remote-work ecosystem
- Lower recruiter competition

CONSTRAINTS

- Smallest engineering supply (4.9)
- Less enterprise maturity
- Limited AI talent concentration
- Smaller senior engineering pool

Positioning. Retention-oriented distributed teams — ideal for companies optimising for stability over depth.

Puebla

PUEBLA

STRENGTHS

- Good cost efficiency
- Strong retention potential
- Low hiring pressure
- Emerging engineering ecosystem
- Close proximity to the CDMX talent pipeline

CONSTRAINTS

- Moderate talent supply
- Average English proficiency
- Limited AI and startup density
- Less mature distributed-work infrastructure

Positioning. Cost-efficient emerging hub — suitable for teams prioritising cost and retention over supply depth.

Tijuana

BAJA CALIFORNIA

STRENGTHS

- US border proximity — straightforward in-person collaboration
- Good English proficiency
- Manufacturing and hardware engineering
- Growing tech ecosystem

CONSTRAINTS

- Smaller tech talent pool
- Higher operational costs relative to supply
- Less mature distributed-work culture

Positioning. Border-proximity advantage — strong for manufacturing tech and companies needing frequent in-person collaboration.

How to read these seven. No ecosystem wins on everything. Guadalajara and Monterrey lead for opposite reasons — balance against operational maturity — while Mérida and Puebla trade supply depth for lower competition and lower cost. The selection question is not which city reads best on paper; it is which constraint your engineering organisation can least afford to carry.

Industry-Specific Engineering Demand.

Mexico has evolved distinct engineering ecosystems aligned to specific industry verticals. Each has its own hub concentration, employer base and in-demand technical skills.

VERTICAL	DEMAND	PRIMARY HUBS	TOP SKILLS
Fintech & financial services	Extremely high	CDMX · Guadalajara	Java, Kotlin, Go, Node.js, Kafka, fraud-detection AI
Enterprise SaaS & product	Very high	Guadalajara · CDMX · Monterrey	React, Next.js, Node.js, Python, AWS, Kubernetes, Terraform
Manufacturing & Industry 4.0	High	Monterrey · Querétaro · Tijuana · León	Embedded C++, firmware, IoT, SCADA, edge computing, OT security
Cloud infrastructure & datacenters	Extremely high	Querétaro · CDMX · Monterrey	AWS, Azure, GCP, Kubernetes, Terraform, cloud security
Healthcare, pharma & healthtech	High	Tijuana · CDMX · Guadalajara · Monterrey	HIPAA-compliant systems, React, Python, AI diagnostics, .NET
Logistics, supply chain & freighttech	Medium-high	Monterrey · Querétaro · Guadalajara · Tijuana	Java, Go, Python, route-optimisation AI, ERP/EDI, TMS/WMS
AI, data & machine learning	Extremely high	CDMX · Guadalajara · Querétaro	GenAI, LLM integration, TensorFlow, PyTorch, Databricks, MLOps

Vertical concentration compiled from Finnovista LATAM Fintech Radar 2025, AMIA and FEMIA member directories, INEGI 2025 manufacturing census, Tijuana EDC Medical Device Cluster reports and Mexico Business News 2025–26. Industry-vertical engineering headcount is not officially measured by Mexican government sources, so no absolute pool size is published here.

CDMX is the fintech engineering capital of LATAM. Strongest demand in digital banking, payments, fraud infrastructure and AI-enabled financial operations. Guadalajara is the country's strongest scalable SaaS ecosystem, with the best balance of engineering maturity, scalability, retention and operational efficiency.

Querétaro is the hyperscaler hub. Cloud and AI infrastructure investment is expected to accelerate over the next decade, potentially making it one of Mexico's most important long-term engineering hubs — and it is currently underused by distributed engineering organisations.

The cross-cutting trend. Mexico is moving from traditional outsourcing toward AI-enabled distributed engineering. It is the fastest-growing hiring category in the country, and it intersects every vertical above.

Highest Premium Skills in Mexico.

Controlled salary premiums represent the compensation uplift for professionals holding each skill, holding other variables constant. Premiums are computed within comparable strata of role family and employer origin.

Mexico Tech Salaries Report 2026, Chapter 13 and Appendix E. Robust confidence means ten or more valid strata and 500 or more holders. Premiums are double-stratified median comparisons within role family and company origin, weighted across valid strata, not raw differences. Company origin alone produces a +68% gap between US-origin and Mexico-origin employers, which is why the uncontrolled figures run high.

Skill clusters

CLUSTER	COMPONENT SKILLS	PREMIUM	N	STRATA	CONFIDENCE
Modern front end	React, TypeScript, Next.js, TailwindCSS, Vite	+19.8%	1,923	13	Robust
Back end stack	Spring Boot, FastAPI, Node.js, Express	+9.9%	276	4	Directional
Cloud / DevOps	AWS, Docker, Terraform, Kubernetes, GitHub Actions	+4.1%	4,352	14	Robust
Data platform	Apache Spark, Apache Airflow, dbt, Snowflake	+3.1%	290	5	Directional
AI / ML	TensorFlow, PyTorch, OpenAI API, Anthropic API, Pandas	-5.3%	1,501	12	Robust

The AI cluster premium is negative, and the report reads it as composition rather than causation. Holding role family and employer origin constant, AI/ML tooling does not command a premium in this dataset: current holders are concentrated in lower-paying segments, especially data-science-heavy roles at Mexico-origin employers. Screen for AI fluency as a baseline capability, not as a pay band. Three clusters clear the Robust bar of ten or more strata — Modern front end, Cloud / DevOps and AI/ML. Back end stack and Data platform rest on four and five strata and are directional.

Full Role Benchmark Table.

All 36 normalised roles the Mexico Tech Salaries Report publishes, sorted by median. Figures are **net monthly USD** — what the engineer takes home after Mexican income tax and IMSS. They are not gross salaries and they are not employer cost.

ROLE	MEDIAN NET USD/MO	25TH-75TH PCT	N	CONFIDENCE
Engineering Manager	4,956	4,437 – 5,925	142	High
Solution Architect	4,904	3,881 – 6,092	291	High
Security Architect	4,143	3,866 – 4,371	45	Directional
Site Reliability Engineer	4,029	3,453 – 4,961	255	High
DevOps Engineer	3,772	3,083 – 4,726	370	High
Project Manager	3,663	2,534 – 4,805	160	High
SDET	3,546	3,234 – 4,453	153	High
Salesforce Developer	3,520	3,050 – 4,162	122	High
Data Engineer	3,376	2,932 – 4,534	376	High
Database Administrator	3,323	2,172 – 4,378	108	Moderate
Mobile Engineer	3,323	2,549 – 4,708	193	High
Scrum Master	3,320	2,211 – 5,192	86	Directional
Data Scientist	3,287	2,729 – 4,911	292	High
QA Automation Engineer	3,223	2,769 – 4,074	172	High
IT Manager	3,191	2,215 – 4,431	440	High
Back End Engineer	3,100	2,333 – 4,431	815	High
Product Owner	3,078	2,597 – 4,094	186	High
Full Stack Engineer	3,060	2,215 – 4,154	843	High

ROLE	MEDIAN NET USD/MO	25TH-75TH PCT	N	CONFIDENCE
Software Engineer	3,046	1,938 – 4,431	927	High
Cybersecurity Engineer	2,997	2,479 – 3,600	217	High
AI Engineer	2,989	1,772 – 4,174	785	High
Other	2,917	2,344 – 3,254	27	Directional
Network Engineer	2,769	1,938 – 3,915	169	Directional
Front End Engineer	2,769	1,994 – 4,015	525	High
Business Analyst	2,769	2,126 – 3,877	157	Directional
Blockchain Developer	2,740	2,441 – 3,086	30	Directional
QA Manual Tester	2,717	1,662 – 3,932	180	Moderate
IT Project Manager	2,634	2,510 – 2,749	35	Directional
Cloud Engineer	2,571	1,385 – 3,790	796	High
System Admin	2,492	1,617 – 3,877	162	Directional
Game Engineer	2,334	2,049 – 4,073	72	Directional
IT Auditor	2,297	1,941 – 5,711	71	Directional
UX/UI Designer	2,215	1,670 – 3,654	260	Moderate
Data Analyst	2,200	1,717 – 3,865	392	High
Tech Support Engineer	2,105	1,218 – 3,051	370	High
Tech Support Specialist	819	759 – 905	30	Directional

English moves a band further than seniority. Engineers with C2 English earn 2.08x those at B1, and the gap holds within every seniority band tested — which is why the English requirement belongs in the requisition rather than in a late screening step.

Confidence is the report's own label. High means reliable for benchmarking and budgeting ($n \geq 100$, confidence interval within 15% of the median). Moderate is usable with caution for directional budgeting ($n \geq 50$, interval within 25%). Directional indicates a pattern to be read alongside other market signals ($n \geq 15$). Every role is published regardless of its label.

From benchmark to offer. Identify the role and seniority, apply the English and employer-origin adjustments, consider work model and location, then check the confidence label. An offer at or above the median for a High-confidence role is market-competitive. The interquartile range is the useful ceiling for premium offers.

Mexico Tech Salaries Report 2026, Appendix A. $n = 10,246$ verified respondents, July 2025 – March 2026, 36 roles, 32 states. Medians are the primary central-tendency measure; bootstrap confidence intervals use 2,000 resamples at the 90% level.

Multinational Engineering Footprint.

Distributed engineering in Mexico is not an emerging strategy — it is a 98-year-old operating reality. IBM began Mexican operations in 1927; HP established Guadalajara manufacturing in the 1960s; Microsoft opened its first Latin American subsidiary in Mexico City on 17 January 1986. The reference architecture below summarises publicly disclosed multinational engineering and R&D presence by ecosystem.

HUB	INDUSTRY FOOTPRINT	PUBLICLY KNOWN ENTERPRISE PRESENCE	TENURE
Guadalajara	Semiconductors, networking, cloud SaaS, consumer hardware	IBM (Campus Tecnológico El Salto), HP (1960s mfg), Intel, Oracle, Continental, Flex, Wizeline, Amazon, Cognizant	60+ yrs
Monterrey	Enterprise software, industrial systems, financial services, automotive software	IBM (San Pedro Garza García), Microsoft (Valle Oriente, since 2007), Whirlpool, Caterpillar, GE, Honeywell	25 yrs
Mexico City	Fintech, AI/ML R&D, enterprise cloud, payments infrastructure	IBM (since 1927 — HQ), Microsoft (since 1986 — first LATAM subsidiary), Oracle, Google, Amazon, HSBC, Citi, BBVA	98 yrs
Querétaro	Automotive software, hyperscaler infrastructure, aerospace systems	Bombardier (since 2006), Bosch, Google Cloud, AWS, KIO Networks	20 yrs
Mérida · Tijuana · Puebla	Embedded systems, hardware engineering, distributed SaaS, cross-border tech	Honeywell, Foxconn, Plantronics	15 yrs

SECTOR GDP CONTRIBUTION

6.3%

The Mexican technology sector's share of national GDP in 2025. Secretaría de Economía / INEGI.

Why this matters for enterprise adoption. Multinationals have run engineering and manufacturing operations in Mexico for decades, which means hiring, payroll, compliance and operational infrastructure are mature. Companies entering the market today operate inside an established institutional environment, not as pioneers.

Microsoft de México opened 17 January 1986 (Microsoft Official History; learn.microsoft.com). IBM began Mexican operations in 1927 (IBM México company filings; MARQ corporate history archives). HP established Guadalajara manufacturing in the 1960s. Bombardier formally established Querétaro manufacturing in 2006. Other entries from publicly disclosed company press releases and AmCham Mexico business directories.

Distributed Engineering at Scale — Verified.

Abstract market analysis is the wrong evidence standard for enterprise capital allocation. The outcomes below come from the CodersLink case study portfolio — eleven years in Mexico, 1,050+ engineers placed across 150+ client companies — and each one is published, with the client's agreement, at coderslink.com.

LEAD CASE STUDY · SAAS · CYBERSECURITY · CALIFORNIA HQ

NetProtect: Asia-to-Mexico engineering migration

NetProtect closed its Asia-based engineering office and stood up a complete replacement nearshore operation in Guadalajara. CodersLink delivered the MESHubs engagement covering the full migration: hiring, infrastructure, payroll, compliance and operational handoff. The team grew from 6 to 40 people and was then transferred to the client's own payroll.

6 → 40

Team growth before transfer

MESHubs

Service model

GDL

Hub selected

Own payroll

Where the team ended up

Role mix included iOS and Android engineering, QA, DevOps, network engineering, tiered technical support and Python full-stack. The case validates two enterprise concerns at once: that Mexico can absorb a complete Asia-replacement workload, and that a partner can hand the team over rather than hold it.

Five More, Across Models and Industries.

The portfolio is not one engagement shape repeated. These five span Staff Augmentation, RPO and dedicated hubs, from a two-engineer product team to publicly traded platforms.

FINANCIAL SERVICES · TEXAS HQ

Q2

57 technology professionals integrated in under nine months, across project management, business analysis, Salesforce, solution architecture, QA, front end, product, UX and implementation support.

The client reports compensation 40–50% below equivalent US salaries — roughly \$600K over the initial nine months — alongside a 35% increase in product roadmap velocity.

Validates regulated-industry deployment at scale, and its cost case.

TECH · CALIFORNIA HQ

Pinterest

A 22-engineer Mexico team built in twelve months through RPO: iOS and Android, front end, full stack and QA, in a multi-quarter pipeline supporting mobile platform expansion.

Validates RPO velocity at a recognised brand.

FINTECH · LENDING

Oportun

A data engineering team built in Mexico through Staff Augmentation.

Validates specialised data capability.

One Inc

A specialised technology team stood up in eight weeks.

Irys Technologies

A Mexico product team grown from two engineers to five, without giving up product control.

“ I feel like they would be our partner forever. The entire experience has just been wonderful, to be honest.

Aliyah Nance · VP of People, Paystand

CodersLink case study portfolio, published at coderslink.com/employers/case-study. Each named client is cited under a published case study. The Q2 saving is that client's own reported outcome for its own engagement, not a market-wide figure; this report does not publish one.

Regulatory, IP and Operational Risk.

Procurement and security organisations evaluating distributed engineering investments need a clear view of the regulatory, intellectual property and operational risk surface. The matrix below covers the dimensions that appear in enterprise risk reviews and master service agreement negotiations.

DIMENSION	STATUS	DETAIL
Intellectual property	Per engagement	Settled in the engagement contract and scoped with your counsel before signature. No blanket term is published here.
Data residency	Supported	Cross-border transfers rely on standard contractual clauses, with the mechanism agreed per engagement.
Replacement cover	Strong	On Staff Augmentation, replacements are unlimited and free for the life of the engagement — no cap, no minimum tenure, no fee — and sourcing restarts within one business day.
Export controls (EAR/ITAR)	Conditional	Mexico is not a restricted destination for EAR-controlled commercial technology. ITAR-classified work generally requires US persons and is not suitable for this model.
Concentration risk	Manageable	Mitigated through multi-hub deployment, for example Guadalajara plus Monterrey, and dual-region strategies pairing Mexico with another market.
Confidentiality	Documented	Every engineer signs an NDA before starting. Custom client NDAs and IP addenda are routed into the engineer's contract.
Candidate verification	Documented	Background verification and structured reference checks are completed and archived before contract signing , and the findings are shared with the client.
Device and equipment control	Supported	Equipment is either client-provisioned or procured and inventoried by CodersLink, checked before shipping.

Risk register addendum. Border-region operations in Tijuana, Ciudad Juárez and Nuevo Laredo carry elevated security considerations that affect on-site work, in-person collaboration travel and retention. Interior hubs — Guadalajara, Mexico City, the Monterrey metropolitan core and Querétaro — operate at security profiles comparable to US metropolitan markets.

On certifications. This report makes no SOC 2, ISO 27001 or DPA claim, and neither should any deck or RFP response you receive without a document behind it. Attestations vary by provider and by engagement scope, so ask for the current letters of whichever partner you are evaluating, CodersLink included, and read the rows above as what is documented rather than what is certified.

Unit Economics by Team Size.

Annual cost per engineer to the client under a CodersLink engagement, for a blended-seniority team — 60% mid-level, 25% senior, 10% staff, 5% leadership. Rates start at a published floor of \$6,500 per engineer per month and rise by role; larger and longer engagements earn better terms, which is what the decline across the tiers below shows. Published floors are \$6,500 mid-level, \$7,500 senior and \$10,500 staff and above; on the blend they reproduce the 26-100 tier to within 0.2%.

TEAM SIZE	COST PER ENGINEER (MEDIAN)	RANGE BY ROLE	OPERATING MODEL AT THIS SCALE
1-25 engineers	\$96,000	\$78k – \$118k	Employment model carried by the partner; no in-country entity required
26-100 engineers	\$88,000	\$72k – \$108k	Dedicated operations and in-country leadership layer emerge
101-250 engineers	\$82,000	\$68k – \$98k	Build-operate economics; entity transfer becomes viable
251-500 engineers	\$78,000	\$66k – \$92k	Direct employment at scale
500+ engineers	\$74,000	\$64k – \$88k	Mature in-country operation

Two things the rate is not. CodersLink never takes a cut of the engineer’s pay: the fee is negotiated with the employer and is never deducted from what the engineer earns. And the employer-of-record function sits inside Staff Augmentation and MESHubs rather than alongside them, so it does not compound on top of the rate.

What sits inside the rate. Net compensation benchmarked to the Mexico Tech Salaries Report, the statutory employer burden of 25-40%, benefits at 5-20%, equipment, and the operating overhead of the employment model. These are floors rather than a rate card: the figure for a given engagement depends on role, seniority and term.

Cost is not the binding constraint. The steepest drop in rate happens between the 25-100 and 100-250 engineer tiers, where in-country leadership and direct-employment economics replace partner-carried overhead. But at every tier the binding constraint is operational maturity, retention infrastructure and senior pipeline depth — which is why ecosystem selection matters more than headline rate.

A note on savings percentages. This report does not publish a market-wide savings figure against US hiring. The comparison depends on the seniority blend, the US market being compared against, and the employment model — and a single percentage hides all three. The rates above, read against your own fully-loaded US cost for the same blend, give you a defensible number for your case rather than ours.

Engineering Time-to-Fill — Market Reference.

Time-to-fill is the operational metric that determines whether the cost position of a nearshore investment translates into shipped product. The benchmarks below establish a US-equivalent baseline for capacity planning.

HIRING PATH	TIME TO FILL	SOURCE
US — organisations with 5,000+ employees	61 days	SHRM Benchmarking 2025, non-executive positions
US — all non-executive positions	44 days	SHRM Benchmarking 2025, overall median
US — senior roles taking longest	90+ days	HR.com, Future of Recruitment Technologies 2025–26: nearly 40% of senior-level roles exceed 90 days
CodersLink — first shortlist	3-5 days	Three vetted profiles for a standard role

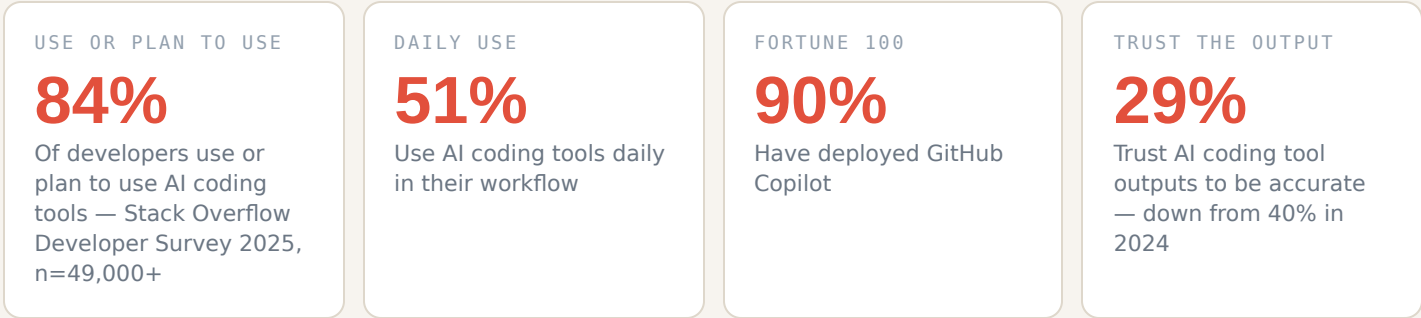
SHRM defines time-to-fill as the days from the requisition opening to the offer being accepted — the same basis CodersLink measures on, which is what makes the comparison legitimate. SHRM publishes no engineering-specific figure; the rows above are the closest published equivalents, not a like-for-like engineering benchmark.

The shortlist commitment, in full. Three vetted profiles in three to five business days for a standard role, five to ten for a specialised one, ten to fifteen for a scarce or niche profile. These are estimates; the service level for your roles is settled on the consultation and intake calls, once role definitions and expectations are handed off to the talent acquisition team.

The strategic read. A US enterprise hiring internally operates on a 61-day median, and nearly four in ten senior roles run past 90 days. Mexico's structural advantage is not the talent pool alone; it is access to that pool through partners operating at a cadence internal teams do not replicate.

AI Tooling and the Delivery Productivity Paradox.

AI coding assistant adoption is now the operational variable with the largest variance in distributed engineering output. There are no Mexico-specific developer surveys at statistical scale, so the global baselines below are the correct reference point.



The DORA productivity paradox. The 2024 DORA State of DevOps Report found that despite measurable individual-developer task speedups of 21-55% with AI coding assistants, team-level adoption correlated with a 1.5% decrease in delivery throughput and a 7.2% decrease in delivery stability. Individual gains do not automatically convert into organisational gains. Distributed engineering organisations must measure both layers independently.

Highest growth engineering categories

CATEGORY	DEMAND TREND	CATEGORY	DEMAND TREND
AI / GenAI engineering	Extremely high	Cybersecurity	Very high
Cloud engineering	Extremely high	DevOps	Very high
Platform engineering	Very high	AI product engineering	High growth
Data engineering	Very high	ML infrastructure	High growth

AI fluency is a screening dimension, not a pay band. Distributed engineering hires should be evaluated on AI tooling fluency alongside core technical depth — and as the skill cluster data shows, that fluency does not on its own command a premium.

Standardisation beats tool choice. Distributed teams that standardise on one AI tool show better delivery convergence than teams where each engineer chooses individually. At enterprise scale the binding constraint is security review discipline, not the tool.

Stack Overflow Developer Survey 2025 (n=49,000+); DORA State of DevOps Report 2024; Pragmatic Engineer AI Tooling Survey, February 2026 (n=900 senior engineers); JetBrains AI Pulse Survey 2026 (n=10,000+).

A Decision Framework for Engineering Leaders.

The matrix below maps common enterprise engineering objectives to ecosystem selection, recommended initial team profile and adoption sequencing. It replaces single-axis recommendations with a multi-variable framework appropriate for VP-of-Engineering-level capital allocation decisions.

IF YOUR PRIMARY OBJECTIVE IS...	LEAD WITH	INITIAL SCALE	TEAM COMPOSITION	ADOPTION SEQUENCING
Distributed scale & retention	Guadalajara	25-50 eng	Full-stack core, QA, DevOps, in-country lead	Partner-carried phase 1 → build-operate phase 2 → own entity past 100 eng
Enterprise integration & regulated industry	Monterrey	15-40 eng	Back end, integration engineering, enterprise systems	Partner-carried, with a dedicated in-country lead from day one
AI / ML, fintech, advanced R&D	Mexico City	10-25 eng	ML engineering, data platform, research-adjacent	Direct employment through the partner; expect premium compensation
Cloud infrastructure & platform	Querétaro + GDL	15-30 eng	DevOps, SRE, platform, network engineering	Dual-hub: Querétaro for infrastructure, Guadalajara for application platform
Retention-optimised delivery	Mérida / Puebla	10-25 eng	Back end, QA automation, support engineering	Partner-carried; smaller batches with deliberate retention investment
Multi-hub risk diversification	GDL + MTY + CDMX	40-100 eng	Distributed by function across three ecosystems	Sequential 60-day hub launches, operations centralised in Guadalajara

Adoption pitfall. The most common failure pattern in enterprise distributed engineering deployments is under-sizing the initial cohort — typically five to ten engineers. Sub-scale teams cannot establish in-country culture, cannot absorb local leadership and become operationally fragile. The minimum effective scale is fifteen engineers with at least one in-country technical lead.

Sequencing principle. Begin with the function highest in operational-maturity demand — platform, infrastructure, QA — not the function with the highest US cost. Operational functions establish the cadence, tooling and integration patterns that downstream specialised functions depend on.

One partner across every stage. Start with one engineer through Staff Augmentation, grow into a dedicated hub with MESHub, hire at volume through RPO — the same partner and the same standard, with no re-sourcing between stages. The NetProtect case is that arc run to its end: a team built here and then handed to the client's own payroll.

Role-by-Role and City-by-City Supply.

Strategic assessment of each engineering role across Mexico's ecosystems, and of skill concentration by city. These are CodersLink Research assessments based on placement history, not measured market counts.

ROLE	SUPPLY	COST EFFICIENCY	HIRING DIFFICULTY	ENGLISH READINESS	REMOTE READINESS	SCALABILITY
Back End Engineers	High	High	Medium	Medium	High	Very high
Front End Engineers	High	High	Medium	Medium	High	High
Full Stack Engineers	Medium-high	Medium-high	High	Medium	High	High
DevOps Engineers	Medium-low	Medium	Very high	High	Very high	Medium
AI / ML Engineers	Low	Medium-low	Extremely high	Medium	High	Very high
Data Engineers	Medium	Medium	High	Medium	High	High
QA Automation	High	Very high	Medium-low	Medium	High	High
Engineering Managers	Low	Medium-low	Very high	Very high	Very high	Medium
Staff Engineers	Very low	Low	Extremely high	High	Very high	Low

Skill Concentration by City.

The same assessment read the other way round: for each discipline, where the depth sits. This is what decides which hub carries which function in a multi-hub deployment.

GEOGRAPHY	BACK END	FRONT END	AI / ML	DEVOPS	DATA ENG.	QA	LEADERSHIP	INTL EXPOSURE
Mexico City	Very high	Very high	Very high	High	Very high	High	Very high	Very high
Guadalajara	High	Very high	High	High	High	Very high	High	High
Monterrey	High	Medium-high	Medium	Very high	High	Medium	High	Very high
Querétaro	Medium	Medium	Medium	High	Medium-high	Medium	Medium-low	High
Mérida	Medium	Medium	Low-medium	Medium	Medium	High	Low-medium	Medium
Puebla	Medium	Medium	Low	Medium	Medium	Medium	Low-medium	Medium

Key insight. Mexico City dominates in AI/ML density and leadership concentration. Guadalajara leads in QA and front end availability. Monterrey stands out in DevOps and international exposure. For most roles, CDMX and Guadalajara offer the highest supply — but Monterrey offers the strongest profile for cross-border operational roles.

What Each Figure Rests On.

Every figure sits in one of four groups. The first two are the strongest: claims carrying a CodersLink reference, and figures reproduced directly from the Mexico Tech Salaries Report.

Claims carrying a CodersLink reference

FIGURE	BASIS
1,556,105 trained	INEGI, comunicado 509/22, ENOE Q2 2022, population 20 and over
Salary benchmarks	Mexico Tech Salaries Report 2026 · 10,246 verified responses · 36 roles · 32 states
7-8 hours of overlap	Mexico has observed no daylight saving since 2022 while the US still moves; the range is that variation
45,000 and 300	CodersLink community; published as an estimate, never as a measured count, always as a pair
First shortlist in 3-5 days	Tiered by role complexity, with the estimate caveat attached
Unlimited replacements	Staff Augmentation only
1,050+ placed · 150+ companies	CodersLink portfolio; published as estimates, without a measurement window
Named client outcomes	Each cited under a case study published at coderslink.com
Engagement rates	Published floors of \$6,500 per engineer per month, rising by role; longer engagements earn better terms
Client quotation	Attributed to the named person and company

Reproduced from the Mexico Tech Salaries Report

FIGURE	WHERE IT COMES FROM	STANDING
Five skill clusters	Chapter 13, Appendix E and page 61. Double-stratified median comparison within role family and company origin, weighted across valid strata	Three Robust, two directional
Employer burden of 35-65%	Chapter 16: statutory employer cost of 25-40% plus benefits of 5-20% over net salary	Published in the report
Confidence labels	Chapter 3. High: $n \geq 100$, interval within 15% of the median. Moderate: $n \geq 50$, within 25%. Directional: $n \geq 15$	The report's own framework
Median, quartiles and n by role	Appendix A. Bootstrap intervals, 2,000 resamples at the 90% level	36 of 36 reproduce at zero difference

External Sources and Declared Assessments.

The remaining two groups: figures carrying a published third-party source but no internal claim reference, and analysis this report declares as its own and labels as such wherever it appears.

Published external sources

FIGURE	SOURCE	REGISTRY STATUS
Labour market context	ENOE / INEGI 2025–2026. National figures, not engineering-specific	No claim reference
Sector share of GDP	Secretaría de Economía / INEGI, 2025	No claim reference
Retention benchmarks	Ravio, Oct 2025 (European tech); Bucketlist 2025; Mercer Tech Talent Retention	No claim reference
US tenure baseline	Bureau of Labor Statistics Employee Tenure Survey 2024; Centum Search 2024	No claim reference
Time-to-fill benchmarks	SHRM Benchmarking 2025; HR.com Future of Recruitment Technologies 2025–26	No claim reference
AI tooling adoption	Stack Overflow Developer Survey 2025 (n=49,000+); DORA State of DevOps Report 2024	No claim reference
Ecosystem and startup counts	Crunchbase; CBRE Scoring Tech Talent 2025; Revelo 2026	No claim reference
Multinational presence	Company filings, official histories, AmCham directories	No claim reference

Declared assessments and model outputs

FIGURE	WHAT IT IS	HOW IT IS LABELLED
Vertical demand	Compiled from sector directories and market reporting	No official headcount exists
Role and geography matrices	Analyst assessments based on placement history	Not measured counts
Unit economics by team size	Published floors on the disclosed seniority blend	Model outputs, not measurements

Why the fourth group is published at all. No official source measures engineering headcount by city, discipline or vertical in Mexico. Rather than publish nothing, this report publishes its own assessment and says plainly that it is one.

NEXT STEPS

Let's stress-test the fit on a call.

Tell us which roles you need to fill, what those people will own, and when you want to hire.

WHAT YOU GET

A read on whether Mexico fits the roles you are trying to fill, and which engagement model matches the scope.

WHAT YOU WON'T GET

A pitch for a model that does not fit. If the answer is a marketplace or an in-house recruiter, we say so.

WHO RUNS IT

Someone who has staffed teams in these cities, not an SDR working from a script.

TIME

Thirty minutes. A person replies — no sequence, no drip.

Book a fit call at coderslink.com/employers →