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A Practical Framework for Strategic Planning of Knowledge Agendas

An IDB Approach Illustrated
by the Mexico Experience

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INTRODUCTION

01

Introduction

For multilateral institutions like the Inter-American Development Bank, knowledge is crucial to shaping effective policies and programs, as it directly influences how development interventions are designed, implemented, and adapted.

Because Latin American and the Caribbean countries rely on the IDB's advice to address their most pressing social and economic challenges, the knowledge it provides must be cutting-edge, timely, rigorous, and relevant. By using knowledge strategically, the Bank can improve the effectiveness of its lending programs and policy dialogues, close knowledge gaps, identify emerging development challenges, and foster sustainable growth across the region. This technical note explores how the IDB and other such organizations can more deliberately plan knowledge generation to improve development results.

To fulfill this complex mandate, organizations need solid knowledge agendas—that is, purposeful action plans that align knowledge priorities with institutional goals to inform decisions and actions, improve the design of future projects, and strengthen the feedback loop between analysis and operations. As part of its broader commitment to knowledge management, the IDB has developed a systematic and comprehensive methodological approach that gives organizations a shared reference for setting priorities by supporting the strategic planning of knowledge agendas. Built on five core components—*Align, Assess, Consult, Prioritize, and Plan*—this framework provides greater clarity to knowledge producers, operational teams, and managers where evidence is still lacking and moves them beyond fragmented efforts toward designing more consistent knowledge agendas. In short, by emphasizing what truly matters for decision making, the process ensures that knowledge contributes to meaningful outcomes.

In practice, a knowledge agenda helps organizations identify the most relevant topics on which new knowledge needs to be generated, applied, or better shared to improve development impact. It includes both analytical knowledge, such as sectoral studies, macroeconomic diagnostics, and cross-cutting thematic research,

and operational knowledge, which reflects insights from impact evaluations and project design and implementation, including how teams solve problems and work with executing agencies. It may also include activities that help enable this ecosystem, such as the formation of academic partnerships, the building of thematic databases, or investment in capacity building on strategic issues. By connecting these different elements, a knowledge agenda helps ensure that what we learn informs what we do, and what we do generates new learning.

This publication presents the IDB's methodological framework for planning knowledge agendas and uses the case of Mexico to illustrate its application. Although developed to support the IDB teams, the framework addresses challenges common to many multilateral and knowledge-based organizations. It can be adapted to different types of institutions and applied at the country level, at the sectoral or departmental level, or across regional programs. Mexico's experience aligned analytical priorities with the IDB's Country Strategy and the Government's Development Plan, serving as a concrete example of how the methodology can be adapted to a specific national context.

The next section of this note introduces the five core components of the methodology and highlights practical considerations for implementation, including examples of how artificial intelligence (AI) can facilitate the process. The third section presents the case of Mexico, and the conclusion offers lessons and final reflections.

FROM ALIGNMENT TO ACTION

**THE FIVE
COMPONENTS OF
THE FRAMEWORK**

02

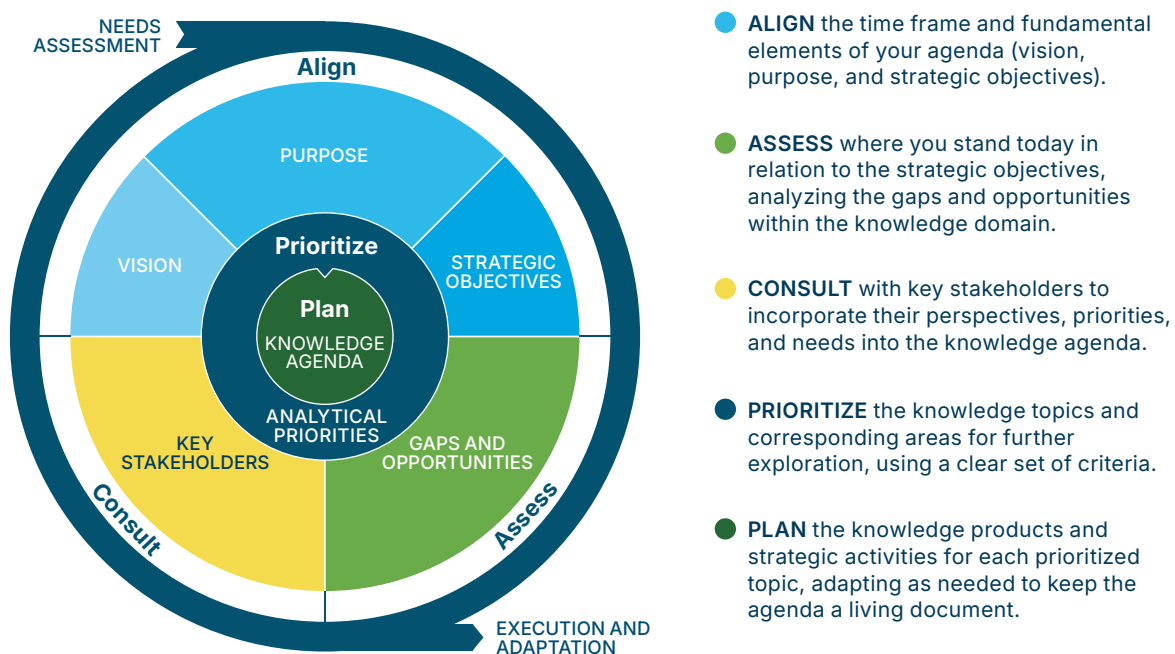
From Alignment to Action: The Five Components of the Framework

To turn knowledge into impact, institutions need more than isolated studies or disconnected efforts. They need a structured yet flexible way to define their priorities, coordinate knowledge work across teams, and ensure that decision making is informed by evidence.

The methodology presented in this note builds on broader strategic planning approaches and reflects an adaptation that the IDB has progressively refined over time to support the prioritization and strategic management of knowledge generation.¹

FIGURE 1

The Five Components of the IDB Knowledge Agenda Framework



Source: Knowledge and Learning Division, IDB.

¹ Strategic planning is commonly understood as a systematic process of reflection and decision making aimed at achieving defined objectives. For an earlier discussion of the IDB's approach to knowledge agendas, see Kyle Stanford Strand, Lorena Rodríguez Bu, and Fernanda Camera, "Siete pasos para crear una estrategia de conocimiento," Inter-American Development Bank Blog, 2021, <https://www.iadb.org/es/blog/conocimiento-abierto/siete-pasos-para-crear-una-estrategia-de-conocimiento>.

As illustrated by Figure 1, the IDB's methodology for planning knowledge agendas is built upon five key components: *Align*, *Assess*, *Consult*, *Prioritize*, and *Plan*. Together, they provide a practical roadmap for developing agendas that are relevant, coherent, and actionable.

The framework for the knowledge agenda is intentionally flexible and dynamic. The five components are not meant to be followed in a strict sequence. In practice, some may unfold in parallel, and the emphasis placed on each will vary depending on the context, available resources, and level of maturity of the agenda. The knowledge agenda is also designed to evolve over time as institutional and country needs shift, new knowledge gaps emerge, and opportunities for learning and collaboration arise. This adaptive nature reinforces the value of continuous learning and periodic recalibration, rather than one-off planning exercises.

In practice, the framework can be applied across different levels or scopes of work, depending on their thematic or geographical focus. The following are the most common applications:

- **Sector or thematic knowledge agendas** address specific areas of expertise or themes and can be developed at the level of an entire sector or a single technical division. They identify research priorities, knowledge gaps, and opportunities for learning relevant to both policy and operational work. These agendas often complement broader diagnostic tools, such as thematic framework documents, and are aligned with institutional goals and evolving development challenges. They help connect cutting-edge global knowledge with regional needs, while contributing to the generation of new evidence when solutions are not readily available.
- **Country knowledge agendas** set out relevant analytical and applied work aligned with the priority areas identified to shape and strengthen the Country Strategy. Tailored to client needs and their evolving nature and aligned with Country Strategy cycles and the continuous dialogue with national authorities, their purpose is to dedicate knowledge efforts to a limited set of priorities that matter for strategic engagement. To ensure alignment with both country-specific objectives and institutional goals, they balance demand-driven inputs with evidence-based considerations.

- **Subregional or multi-country knowledge agendas** are based on priorities shared by a group of countries that face common development challenges within a specific geographical region. Based on these agendas, organizations can identify opportunities for cross-country collaboration, strengthen the analytical foundations for regional dialogue, and align their efforts with institutional priorities and regional programs. Findings and priorities from country-level agendas are also integrated into multi-country agendas to promote coordination and coherence across the subregion.
- **Program or initiative knowledge agendas** are developed to support cross-cutting or multi-country initiatives that are not limited by geographical or sectoral boundaries. Typically organized around a specific theme or development challenge, these agendas provide an analytical foundation for strategic programs by coordinating knowledge generation and learning efforts across countries, sectors, and/or teams. They define shared knowledge priorities, consolidate relevant evidence, and promote collaboration among diverse actors working toward a common development objective.

Before proceeding to the five components of the framework, the process to create a knowledge agenda begins with a needs assessment to help clarify the scope of the agenda, identify the internal client or team leading the effort, and provide an understanding of where the team currently stands. The assessment typically involves a conversation to determine whether the agenda will focus on a sector, country, subregion, or initiative. It also helps determine how much groundwork has already been done and what existing information can be useful to the current process. This diagnostic procedure is essential for tailoring the approach to the specific context for and needs addressed by each agenda.

The following describes in turn the five components that are engaged once the needs assessment is completed.

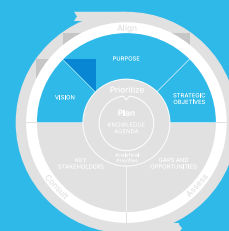
2.1

ALIGN Vision, Purpose, and Strategic Objectives

Aligning a knowledge agenda starts by defining its fundamental elements—that is, its vision, purpose, and strategic objectives. These elements help establish the agenda's direction, clarify the ambition behind it, and ensure its alignment with institutional goals and the needs of clients, regions, or sectors. Together, they form a cascading structure that begins with an aspirational long-term vision; continues with a concrete purpose that defines what the organization wishes to achieve, for whom, and why; and culminates in clear objectives to guide implementation. The result is a strategic foundation for making decisions about what knowledge to prioritize and why.

Different types of knowledge agendas may require different anchoring elements. A country-level agenda, for example, may draw directly from the Country Strategy, while a sectoral agenda may be guided by thematic framework documents or evolving global debates. The aim is to clarify the agenda's scope, time frame, and intent while linking it to institutional strategies and regional priorities.

COMPONENT 1: ALIGN



What it is

A definition of the fundamental elements of the knowledge agenda—vision, purpose, and strategic objectives—that establish a shared direction.

Why it matters

Without explicit alignment, knowledge agendas risk becoming broad inventories of interests rather than strategic instruments. Alignment ensures that later decisions about what knowledge to generate, apply, or share are anchored in a shared understanding of intent and relevance. The elements of the knowledge agenda help teams stay focused and accountable, even as priorities evolve.

Key questions

1. **Vision:** What is your long-term aspiration for change in this area?
2. **Purpose:** What are you seeking to do with this knowledge, for whom, and why does it matter?
3. **Strategic objectives:** What specific results do you want to achieve in the next years? How will you track progress?

Examples

- **Vision:** A country where all children have equitable access to high-quality education.
- **Purpose:** To generate actionable knowledge to support governments in designing and scaling up effective policies that improve learning outcomes in basic education.
- **Strategic objectives**
 - To strengthen the use of evidence in the design of national education policies.
Indicator 1: Number of education policies or reforms informed by your knowledge products
 - To expand regional collaboration to address shared education challenges.
Indicator 2: Number of multi-country knowledge initiatives

How artificial intelligence can help

The align component relies primarily on leadership judgment and strategic intent. AI does not define alignment. It can, however, support the process by drafting first versions of vision or purpose statements based on initial inputs, synthesizing stakeholder inputs to identify common goals, or suggesting illustrative indicators teams can assess and refine. Final decisions on vision, purpose, and objectives remain a human responsibility.

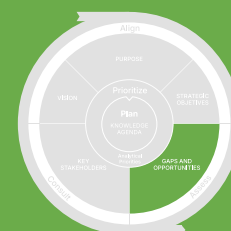
2.2

ASSESS Current Situation

After clarifying the vision, purpose, and strategic objectives of the knowledge agenda, the next step is to understand where the organization stands today in relation to those objectives. This means identifying what is already known, where insights are missing, and what opportunities lie ahead. In short, it involves taking a snapshot of the current situation to uncover the most relevant knowledge gaps and niches for action.

This assessment can draw on a variety of analytical tools and data sources. It can be carried out at the beginning of the process, to guide prioritization, or iteratively as new information becomes available.

COMPONENT 2: ASSESS



What it is

An analysis of the current knowledge landscape that identifies gaps and opportunities, serving as a clear baseline for prioritization and decision making.

Why it matters

Grounding the knowledge agenda in evidence ensures decisions are based on a clear understanding of what is already known and what remains to be explored. The creation of a knowledge agenda without a clear assessment risks duplicating existing work or investing in areas with limited strategic value.

Key questions

- Where are the knowledge gaps and emerging needs in this area?
- What knowledge is already available, and what is underused or outdated?
- What opportunities exist to create synergies across actors, countries, or sectors?

Examples of inputs

- **Bibliometric reports:** Analysis of published research outputs, including volume, authorship, themes, and trends, to identify where literature is concentrated and where gaps exist.
- **Mapping of ongoing studies and research:** Identification of work in progress (not yet published) to find synergies, avoid duplication, and coordinate efforts across teams.
- **Stakeholder landscape mapping:** Identification of actors and institutions that influence or are affected by the knowledge agenda, setting the stage for future consultations.
- **Evidence gap maps:** Use of visual tools to show where robust evidence exists and where more impact evaluations and literature reviews are needed.
- **Project-level data and lessons learned:** Use of operational evidence from past projects to highlight implementation challenges, good practices, and areas where further knowledge is needed.
- **Digital landscape analysis:** Review of digital platforms and resources to identify emerging trends, topics of interest, and how similar institutions are positioning themselves.
- **Citation analysis:** Assessment of the visibility and influence of specific knowledge products by tracking how often they are cited in relevant documents.
- **Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis:** Facilitation of reflection on strengths, weaknesses, opportunities, and threats related to the scope of the knowledge agenda.

How artificial intelligence can help

AI can act as a scout, organizing large volumes of data, identifying patterns, and clustering insights at scale. With the right prompts, it can reduce analysis time dramatically. It can, for instance, synthesize key themes from project reports, detect underresearched areas, or cluster overlapping knowledge products across countries.

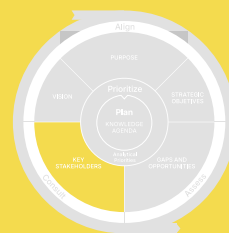
2.3

CONSULT Key Stakeholders

Engaging the right stakeholders is essential to ensure the knowledge agenda reflects real needs and is grounded in diverse perspectives. The consult component emphasizes structured consultations with internal and external actors to bring knowledge priorities to the surface, validate findings, and build ownership. While formats may vary, from interviews and surveys to policy dialogues and co-creation workshops, the objective is the same: to listen actively and integrate stakeholder voices into the agenda from the start. In many cases, these actors also become important partners in its implementation.

These stakeholders may include government officials from relevant ministries, policymakers, economic advisors, sector specialists, knowledge coordinators, multilateral organizations, private-sector actors, civil society organizations, academia, and think tanks, among others. Not all stakeholders play the same role in every agenda. Depending on its scope and objectives, it may also be important to engage regional networks, foundations, or the media. In many cases, these stakeholders are not only sources of insight but potential partners in the implementation, and/or they are essential to the credibility and uptake of the agenda.

COMPONENT 3: CONSULT



What it is

A structured consultation process to capture stakeholder needs, perspectives, and priorities, ensuring the knowledge agenda is relevant, legitimate, and grounded in real-world challenges.

Why it matters

Effective knowledge agendas are co-created, not imposed. Engaging key actors early helps validate assumptions, uncover blind spots, and strengthen ownership. It also lays the groundwork for collaboration during implementation and increases the likelihood that the agenda will be taken up and used.

Key questions

- Whose perspectives are essential to shape and implement this knowledge agenda?
- What is the most effective way to engage them in a meaningful and timely manner?

Examples

Stakeholders

- Government officials and policymakers
- Sector specialists and subject matter experts
- Academia and think tanks
- Internal operational teams and knowledge coordinators
- Private-sector actors
- Multilateral institutions and international organizations
- Civil society organizations
- Executing agencies
- Foundations, regional networks, or media (depending on scope)

Consultation methods

- Semi-structured interviews with key stakeholders
- Surveys to capture broader institutional or external input
- Workshops to validate or co-create knowledge priorities
- Multi-stakeholder roundtables or regional dialogues
- Ongoing engagement through technical networks or communities of practice

How artificial intelligence can help

AI tools can be used to help synthesize stakeholder inputs, extract common themes across interviews or surveys, and organize raw data into summary tables or thematic clusters. They can help reduce processing time and surface patterns across consultations. While AI can accelerate the processing of large volumes of qualitative data, it does not assess legitimacy, relevance, or feasibility. Interpreting inputs, weighing tradeoffs, and deciding how feedback shapes the agenda remain a human responsibility.

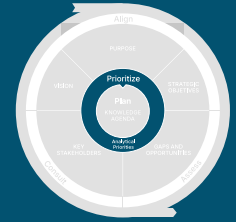
2.4

PRIORITIZE Knowledge Topics

Through prioritization, a long list of knowledge topics can be transformed into a focused set of strategic priorities. This step is where tradeoffs become explicit. Prioritization ensures the knowledge agenda directs time, attention, and resources to the areas with the highest value—those that are most aligned with the agenda's objectives and most likely to drive results.

The prioritization process requires three basic ingredients: (1) a list of possible knowledge topics, which emerges from the analyses, consultations, and reflections conducted in previous stages; (2) a clear set of prioritization criteria, such as urgency, potential impact, or feasibility; and (3) a structured method to apply those criteria and select the most relevant topics. Methods can range from the use of simple models to the application of more advanced tools.

COMPONENT 4: PRIORITIZE



What it is

A structured process to rank and select the most relevant knowledge topics, based on clear criteria that reflect strategic value.

Why it matters

In any strategic effort, resources are limited. A clear set of priorities ensures time, funding, and analytical capacity are directed toward the topics with the greatest potential to inform decisions rather than being spread thinly across competing demands. Prioritization brings focus and discipline to the knowledge agenda, helping avoid dispersion and reinforcing its strategic value.

Key questions

- What are the knowledge topics to be included in this agenda, based on the analyses and reflections conducted so far?
- What prioritization criteria are most relevant given your strategic objectives?
- Considering the number of topics, the criteria to be applied, the participants involved, and the time and resources available, what prioritization method is best suited to your process?

Examples

Criteria

- Strategic alignment
- Government priority
- Knowledge gap magnitude
- Urgency
- Potential impact
- Innovation potential
- Feasibility
- Resource availability
- Internal capacity
- Opportunity for collaboration
- Positioning/niche leadership
- Complementarity with partners

Prioritization methods

- **Binary method** (yes/no filter)
- **Scoring matrix** (weighted or unweighted criteria applied across topics)
- **2 x 2 matrix** (e.g., urgency vs. impact)
- **Voting method** (participants allocate a fixed number of votes or stickers to preferred topics)
- **Pairwise comparison** (e.g., analytic hierarchy process)
- **Deliberative ranking** (consensus-based prioritization through facilitated discussion)

How artificial intelligence can help

AI can support prioritization by revealing thematic clusters or patterns across proposed topics, generating visualizations, or organizing human-provided inputs into structured rankings. While it can help reveal patterns and inconsistencies across criteria, AI does not replace final human judgment.

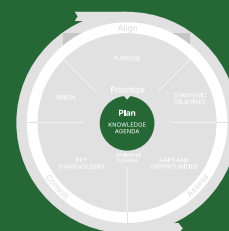
2.5

PLAN the Knowledge Agenda

Once strategic objectives have been defined and knowledge topics prioritized, the next step is to plan how the agenda will be implemented in practice. This means translating priorities into concrete actions. Planning is not about producing a rigid blueprint but about drawing a shared roadmap that connects strategy to execution, clarifies responsibilities, and allows for adaptation as circumstances evolve.

The result is typically an action plan matrix that links each strategic objective and knowledge priority to a set of activities, along with designations of responsible teams, metrics for tracking progress, and estimates of costs. In addition to research and the production of new knowledge products, the action plan can include such strategic activities as the forging of new academic partnerships, the strengthening of internal and external capacities, or the creation and expansion of expert networks. These elements are often essential to ensure the effectiveness and long-term sustainability of the knowledge agenda.

COMPONENT 5: PLAN



What it is

A planning matrix that translates strategic objectives and priorities into a set of activities, responsibilities, metrics, and estimated costs, providing a clear basis for execution and accountability.

Why it matters

Without a clear implementation plan, even the best-designed knowledge agenda may fail to generate impact. Planning helps ensure strategic priorities are operationalized through concrete actions and adequate resources. It also creates clarity and accountability among teams and facilitates ongoing monitoring and adaptation.

Key questions

- What strategic activities are needed to deliver on each priority and objective?
- Who will be responsible for each activity, and what metrics or indicators will be used?
- What resources and enablers are needed to implement this plan?

Example

Strategic objectives	Progress indicators	Knowledge priorities			Key activities	Responsible team	Metrics	Estimated cost
		1	2	3				
	Indicator 1.1							
Objective	Indicator 1.2							
	Indicator 1.3							
Example								
Strengthen public-sector service delivery	Increased uptake of digital government services	Behavioral barriers to adoption of digital public services	Identify barriers and test a simpler registration flow	Public-sector modernization team	Percentage increase in completed registration	Amount in dollars		

How artificial intelligence can help

AI can support planning by suggesting activities linked to each priority, grouping similar tasks, and helping teams identify dependencies or inconsistencies in the plan. With high-quality inputs, AI tools can accelerate planning. While it can help stress-test the internal coherence of the plan, AI does not make decisions about feasibility, sequencing, or resource allocation, which remain a human responsibility.

As discussed earlier, the knowledge agenda should be treated as a living instrument, capable of evolving as priorities shift, new needs emerge, and the institutional or country context changes. Sustained implementation requires ongoing dialogue with government counterparts and regular follow-up with the actors involved, ideally every six months, to track progress, resolve challenges, and adapt the plan as needed. Beyond guiding execution, the action plan serves as a coordination mechanism across teams. It gives a clearer picture of what's ahead in the knowledge pipeline and enables earlier communications planning, ensuring that knowledge products are timely, well targeted, and positioned for greater use and impact.

APPLYING THE METHODOLOGY

**THE CASE
OF MEXICO**

OSB

Applying the Methodology: The Case of Mexico

Over a recent six-month period, the IDB Country Office in Mexico collaborated closely with national counterparts on developing a comprehensive agenda to guide the Bank's knowledge work in the country over a three-year strategic horizon. The process systematically followed the five recommended components of the IDB's methodological framework, resulting in the alignment of analytical priorities with the country's National Development Plan, as reflected in the new IDB Country Strategy for Mexico. Figure 2 summarizes the activities carried out across each component of the methodology.

FIGURE 2

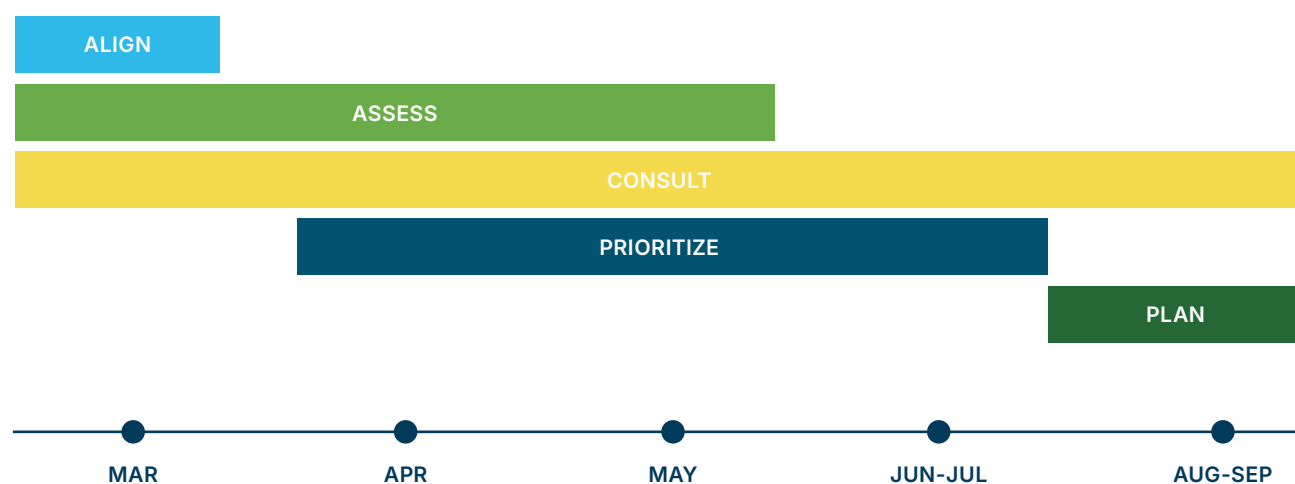
Mexico Knowledge Agenda: Activities across the Five Components



While the five components (Align, Assess, Consult, Prioritize, and Plan) are presented sequentially, in practice the process was not strictly linear. Rather, it was highly iterative and adaptive, with work on several components advancing concurrently and insights from one often informing or reshaping others. This flexibility was essential in a context such as Mexico, where strong domestic analytical capacity and multiple development partners already shape the knowledge ecosystem. Figure 3 presents the implementation timeline, illustrating how the methodology unfolded over the six-month period.

FIGURE 3

Timeline of the Knowledge Agenda Creation Process



3.1 Align

As noted in Section 2.1 above, the alignment process for a knowledge agenda is built on the fundamental elements of vision, purpose, and strategic objectives. Often, in country-level agendas, the vision and purpose are embedded in the overarching Country Strategy. In the alignment process for Mexico, they were anchored in the new IDB Country Strategy for Mexico (2026–31),² as well as the

² Inter-American Development Bank Group, *Strategic Agreement between Mexico and the IDB Group: Country Strategy 2026–2031* (CII/GN-622) (Washington, DC, 2025), <https://www.iadb.org/document.cfm?id=EZIDB0001471-218120113-28>

country's National Development Plan.³ These documents provided a common vision and strategic direction for identifying areas in which knowledge and evidence could generate tangible impact. The knowledge agenda ultimately created for Mexico rests on the three pillars of its Country Strategy and their respective strategic objectives:⁴

- **Pillar 1: Economic growth fostered in synergy with the private sector**

Strategic objectives:

- Improve the conditions for productive integration within the private sector.
- Support a pro-growth and sustainable fiscal policy.
- Strengthen the institutional framework of the labor market.

- **Pillar 2: Provision of social services**

Strategic objectives:

- Enhance access to, and the quality of, care services.
- Expand the provision of basic services and consolidate the circular economy.
- Support urban development.

- **Pillar 3: Resilience**

Strategic objectives:

- Mitigate the socioeconomic impact of emergencies.
- Transform infrastructure for resilience and sustainability.

Progress toward the objectives associated with all three pillars will be monitored using the indicators established in the results matrix included in the Country Strategy.

³ México, Presidencia de la República, *Plan Nacional de Desarrollo 2025—2030*, Diario Oficial de la Federación, 15 de abril de 2025, <https://www.dof.gob.mx/2025/PRESREP/PND%202025-2030.pdf>.

⁴ Inter-American Development Bank Group, *Mexico Country Strategy 2026–2031*, 14.

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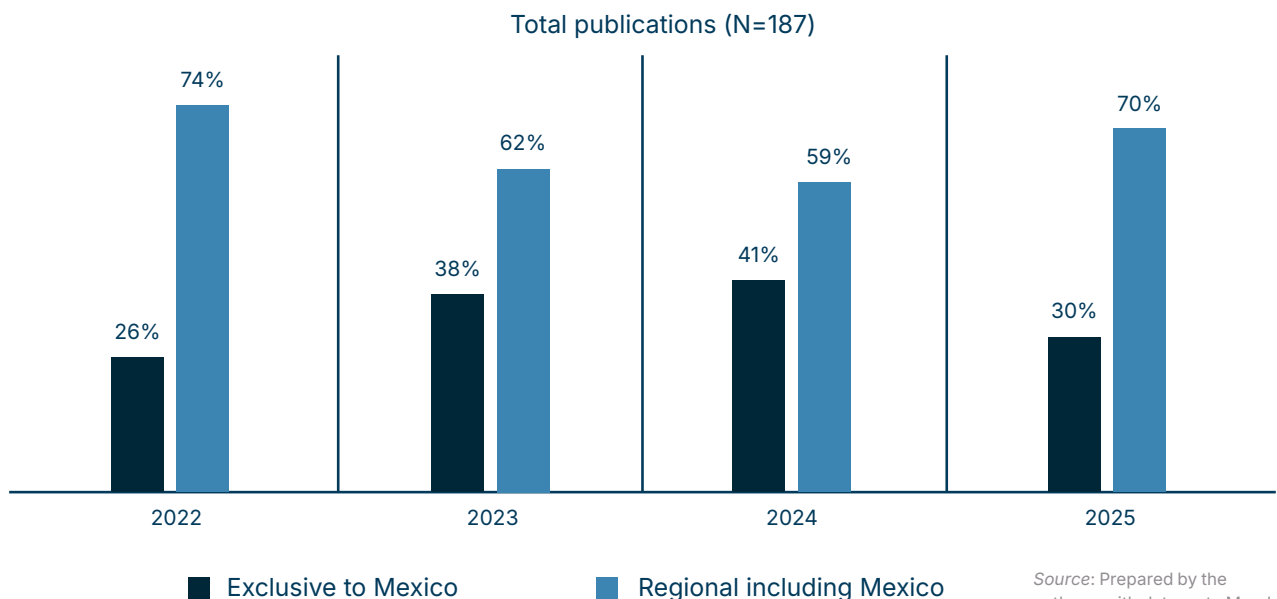
Assess

Assessment conducted for the Mexico knowledge agenda sought to gain an understanding of the current knowledge landscape, both within the IDB and across the broader national and international ecosystem, by identifying gaps, overlaps, and strategic opportunities. The objective was not to replicate existing diagnostics but, rather, to situate the IDB Group's knowledge efforts within a dense and diverse knowledge environment.

Internally, the team reviewed 187 IDB knowledge products published over the previous three years (Figure 4) and identified 102 additional products that were in the process of being executed or in the pipeline, including research, evaluations, and sector studies containing data from Mexico. All products, both published and ongoing, were classified in two ways: first, according to the three strategic pillars defined in the Country Strategy; and, second, by geographical scope, distinguishing between Mexico-specific publications and multi-country or regional products that included content relevant to Mexico. This analysis helped uncover ongoing efforts, reduce duplication, and enhance coordination across teams.

FIGURE 4

IDB Publications with Data from Mexico (2022–25)



Source: Prepared by the authors, with data up to March 14, 2025, extracted from the IDB Publications Catalog.

To complement the internal stocktaking, the team conducted a bibliometric analysis to view the broader knowledge panorama by retrieving and analyzing published research to identify themes, trends, and contributing institutions. The analysis covered more than 37,000 academic publications related to Mexico, drawing on metadata from OpenAlex,⁵ an open-source database. Among the findings, for example, the National Autonomous University of Mexico (UNAM) stood out as a leading institution in terms of author affiliation, alongside other national and international universities. These results provided insight into the most active knowledge producers, offering useful leads for potential partnerships and helping to inform the stakeholder consultation phase.

In addition, the team conducted a citation analysis of public policy documents using the Overton⁶ database, which helped identify how existing IDB knowledge was referenced in national policy debates, as well as the types of documents and institutions most frequently cited. This analysis was complemented by an examination of 139 impact evaluations and systematic reviews relevant to Mexico, extracted from the 3ie Development Evidence Portal.⁷ The review included a sectoral concentration scan to highlight areas with limited existing evidence. Together, these efforts provided a broader perspective on the use and influence of knowledge in Mexico and helped identify areas in which evidence that could inform future work was lacking.

3.3

Consult

Stakeholder engagement played a vital role in creating the Mexico knowledge agenda. Consultations occurred throughout the process, contributing iteratively to the identification, refinement, and validation of knowledge priorities. The objective was not broad-based consultation but, rather, targeted engagement with actors who shape, use, or influence knowledge in Mexico.

⁵ OpenAlex is a free, open-source index of scholarly publications, authors, institutions, and research metadata, available at <https://openalex.org>. It is designed to support large-scale bibliometric analyses and academic mapping.

⁶ Overton, available at <https://www.overton.io>, is a database of policy documents, guidelines, and government reports that tracks how research is cited in public policy.

⁷ The International Initiative for Impact Evaluation (3ie, available at <https://www.3ieimpact.org/evidence-hub>) maintains a global repository of impact evaluations and systematic reviews across development sectors.

The team engaged with a wide range of internal and external stakeholders. Internally, workshops brought together sector specialists working on Mexico; sector economic advisors; the Research Department; and other relevant teams across the IDB Group, including IDB Invest and IDB Lab. Participants in these discussions considered how existing and planned knowledge could be used to support the Country Strategy, rather than seeking to generate a standalone research agenda. The sessions helped identify more than 100 preliminary knowledge gaps, which were later clustered among the three strategic pillars of the Country Strategy, as illustrated in Figure 5.

FIGURE 5

Knowledge Gaps Identified, by Strategic Pillar (Internal Workshops)

	Country Strategy pillars	Gaps
1	Economic growth fostered in synergy with the private sector	50
2	Provision of social services	13
3	Resilience	33
	N/A	8
		Total 104

Note: Eight gaps that were not clearly associated with any of the three strategic pillars were classified as N/A.

Externally, a series of discussion panels was held with government officials to gain a better understanding of policy needs and priorities. In addition, a perception survey was conducted to obtain views from a broader range of stakeholders on the usefulness and relevance of IDB knowledge. Respondents included representatives from government agencies, academic institutions, civil society organizations, nongovernmental organizations, and the private sector. In addition to the survey, early exchanges with local academic stakeholders aided the exploration of emerging research interests and signaled a strong appetite for closer collaboration with the IDB. The results of these consultations helped the team refine the agenda’s thematic focus and identify opportunities for co-production and future dissemination.

3.4

Prioritize

To prioritize knowledge topics, the team began by clustering and systematizing the gaps identified through the internal and external consultations. The prioritization process was primarily consensus based, with teams considering the magnitude of each knowledge gap, the urgency of addressing it, and its potential impact, as reflected by the results matrix of the Country Strategy.

To deepen the prioritization process, the team engaged in structured dialogues with local academic institutions in Mexico. These deep-dive workshops brought together more than 20 researchers and experts from national leading institutions, including UNAM, the Tecnológico de Monterrey, and other universities and think tanks. The sessions explored specific research questions, helped validate analytical priorities, and revealed opportunities to add value by complementing existing expertise rather than duplicating it. Beyond refining research questions, these engagements strengthened relationships within Mexico's academic community, laying the groundwork for sustained collaboration, joint analytical initiatives, and ongoing research coordination aligned with the Country Strategy.

This iterative process culminated in the selection of 14 analytical priorities across the three strategic pillars, as presented in Figure 6. Each topic was mapped to an expected impact from the Country Strategy's results matrix, establishing a clear connection between knowledge efforts and the country's intended development outcomes. These priorities now form the backbone of the knowledge agenda and will guide research efforts over the three-year horizon.

FIGURE 6

Prioritized Knowledge Topics by Strategic Pillar

1 Economic growth fostered in synergy with the private sector	2 Provision of social services	3 Resilience
Expected impact: Increase financing flows to corporations and small and medium-sized enterprises. 1. Assess the causes for the lack of financing and the consequences for business demography and growth.	Expected impact: Expand the coverage of care services. 6. Propose financing alternatives for care systems. 7. Estimate capacity gaps in social services provision. 8. Assess support for cash transfers as an alternative to health or education programs.	Expected impact: Reduce the impact of climate shocks. 11. Create models to measure climate change impact considering fiscal and regulatory characteristics. 12. Quantify and propose project impact assessment and long-term monitoring strategies.
Expected impact: Strengthen productive capacity and innovation. 2. Measure the impact of tariffs. 3. Quantify capital per worker and its connection to weak growths.	Expected impact: Optimize access to quality housing. 9. Show determinants for the lack of accessible housing in urban expansion processes. 10. Determine efficiency gains from introducing digital tools to link different urban and housing factors.	Expected impact: Expand access to resilient transportation and mobility. 13. Propose a framework for evaluating nature-based solutions in traditional infrastructure projects.
Expected impact: Boost tax revenue collection. 4. Identify the effects of the existing tax arrangements on investment by states and municipalities.		Expected impact: Boost energy efficiency and electric power generation. 14. Identify models that enable infrastructure financing based on social security (AFORES) resources.
Expected impact: Strengthen compliance with the legal framework for workers' labor rights. 5. Investigate the size and type of distortions caused by the various taxes on labor.		

Source: Adapted from Inter-American Development Bank Group, *Mexico Country Strategy 2026–2031*, 39.

3.5

Plan

Building on the 14 prioritized knowledge topics, the planning process sought to translate these priorities into an actionable work plan outlining activities, lead teams, and resource needs for implementation between 2025 and 2027. Strategic activities included not only the production of new studies but efforts to strengthen partnerships, build technical capacities, and take advantage of cross-sectoral synergies.

While confidentiality considerations prohibit its inclusion in this publication, the action plan is being used as a coordination mechanism within the IDB Group and a platform for ongoing dialogue with counterparts as the knowledge agenda evolves. As with many strategic plans, ensuring effective implementation over time is an ongoing challenge. Strengthening coordination across knowledge instruments and aligning agendas with existing programming processes within the organization is important to ensure prioritized topics can be effectively addressed.

LESSONS AND FINAL REFLECTIONS

04

Lessons and Final Reflections

The experience of developing the Mexico knowledge agenda demonstrated the value of applying a structured yet adaptable methodology to this undertaking. The five-component framework (*Align, Assess, Consult, Prioritize, and Plan*) proved instrumental in guiding a highly participatory process that brought together internal teams and external stakeholders around shared objectives. The agenda's design benefited from early engagement, strong leadership alignment, and the strategic use of diverse analytical tools, which together created momentum and ownership across the IDB Group.

Among the most important insights from this experience is that effective knowledge agendas require more than technical rigor. They also demand institutional coordination, intentional follow-up mechanisms, and space for iteration. Mexico's process demonstrated how a country knowledge agenda could operate as both a planning instrument and a coordination mechanism, providing strategic focus, lending visibility to the knowledge pipeline, and helping ensure that knowledge generation remained aligned with evolving priorities. The flexibility built into the framework allowed teams to work through each component at the appropriate intensity, according to context, while maintaining a coherent process.

This case also reaffirmed that not all knowledge has the same impact. Prioritization is essential to allocate institutional resources to the most valuable knowledge—that is, topics that are timely, feasible, and aligned with the countries' needs. By grounding decisions in evidence and revealing gaps through the use of tools such as bibliometric analysis, citation tracking, and stakeholder consultations, the process moves beyond intuition or legacy practices toward more transparent and accountable planning. In Mexico, this process was further strengthened by greater collaboration across the IDB Group, including the Vice Presidency for Sectors and Knowledge, the Vice Presidency for Countries and Regional Integration, IDB Invest, IDB Lab, the Knowledge and Learning Division, and the Department of Research and Chief Economist. This inclusive effort helped ensure the agenda was not only technically sound but broadly owned and aligned across institutional windows.

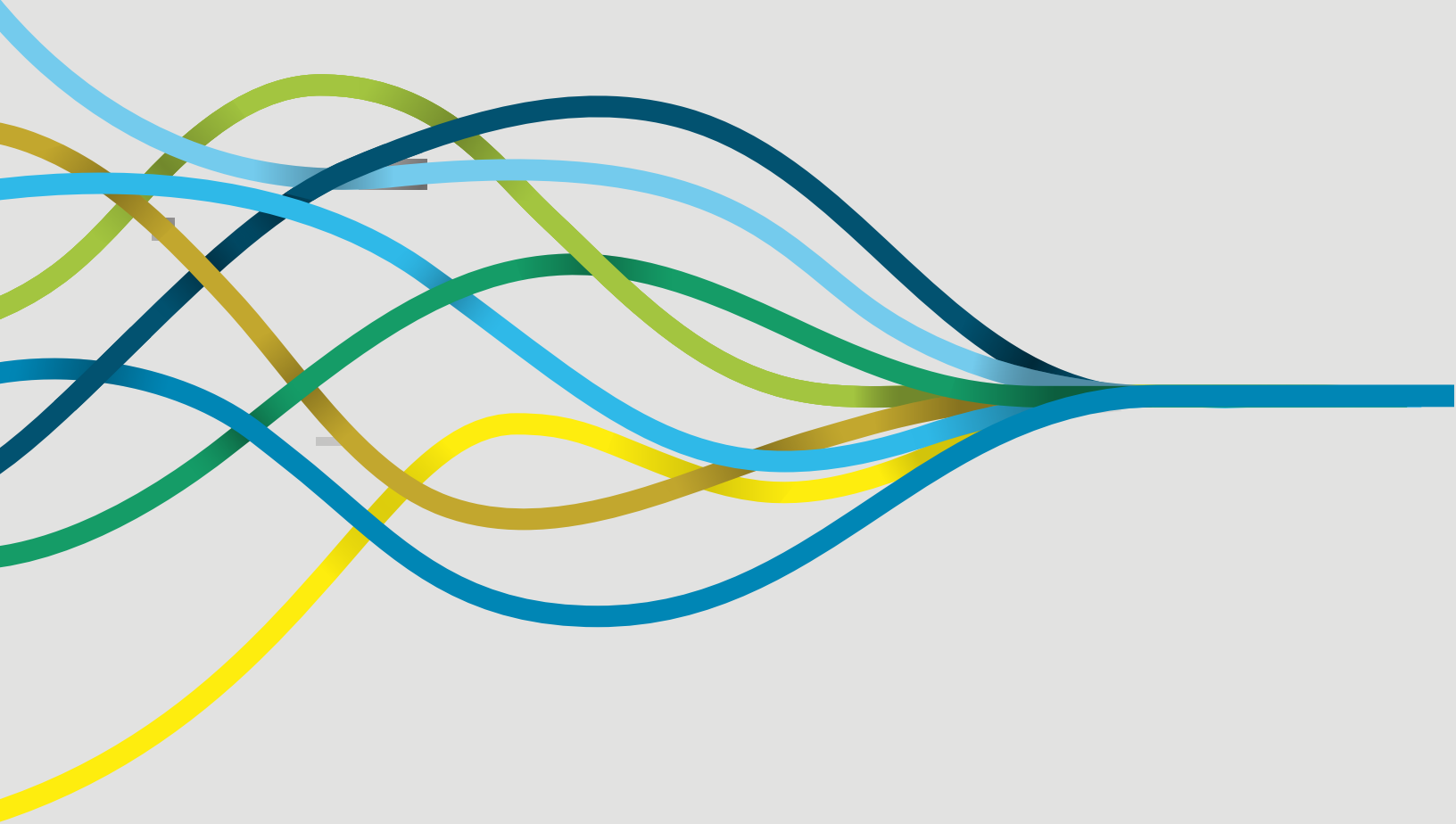
Finally, the application of this framework by Mexico marked a significant step forward in systematizing knowledge planning across the Bank. It enabled

stronger integration of evidence, operations, and partnerships and helped reduce fragmentation by clarifying where the Bank can add value within broader knowledge ecosystems. While the exercise conducted in Mexico was comprehensive, replicating the same level of depth everywhere may not always be feasible. Future agendas may, therefore, adapt the scope and intensity of the process to country context, data availability, and institutional capacity.

When applied thoughtfully, the methodology can be scaled and adapted to a range of agendas, whether country specific, sectoral, or programmatic. As experience accumulates, the approach will continue to evolve to ensure its implementation remains feasible across different contexts. With continued leadership support and iterative learning, the IDB and other development organizations can use this approach to ensure knowledge efforts lead not only to better insights but to better decisions. It also reinforces the value of managing knowledge systematically to advance institutional priorities, close evidence gaps, and ensure a stronger connection between knowledge and operational effectiveness for lasting impact.

Takeaways from this technical note

1. **A knowledge agenda should be structured, not rigid.** Its creation requires clear methodology, with room for adaptation and iteration.
2. **Leadership matters.** High-level support and coordination enable alignment and follow-through.
3. **Evidence comes first.** Analytical tools help identify real gaps in knowledge and prevent duplication.
4. **Stakeholders enrich the process.** Consultations build ownership, relevance, and collective insight.
5. **An action plan brings strategy to life.** A concrete roadmap ensures focus, alignment, and accountability.



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