



Tools and methods

Deepening Understanding: Lessons learnt by the European
Centre on investigating societal issues

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EUROPEAN CENTRE FOR SOCIAL WELFARE POLICY AND RESEARCH

GENERAL
ASSEMBLY



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Outline

- ✓ Tools and methods overview
- ✓ Microsimulation of tax-benefit policies with EUROMOD & SORESI
- ✓ National survey research
- ✓ Qualitative data collection methods
- ✓ Peer learning
- ✓ Monitoring and evaluation

Tools and Methods overview

A wide range of qualitative and quantitative methods to study social welfare policy

- statistics, interviews, focus groups, policy document analysis, surveys, evaluation, and interactive multistakeholder co-development

The importance of the diversity of methods

- Matching aims, puzzles, research questions with the appropriate method
- Triangulation in terms of perspectives and empirical data

Microsimulation of tax-benefit policies with EUROMOD & SORESI

- EUROMOD, the microsimulation model for estimating budgetary and distributional effects of taxes and benefits for all 27 EU Member States
- Coordinated and maintained by JRC (EC), jointly with national teams
- Policies and data update annually
 - policies: IT, SIC, monetary benefits (direct), VAT, excise taxes (indirect)
 - input data: EU-SILC, HBS, HFCS, register data
- Policy model and software freely accessible; Input data on request
- European Centre maintains Austrian tax-benefit policies, input data and implements Austrian and comparative projects

SORESI (Sozialreform-Mikrosimulation) for Austria

- **Online tool** to simulate the fiscal, income and distributive effects of tax-benefit reforms in Austria
- **Updated** annually & publicly accessible
- Based on EUROMOD and EU-SILC
- **Maintained** by European Centre staff in cooperation with the Federal Ministry of Labour, Social Affairs, Health, Care and Consumer Protection & BRZ

Grenzsteuersätze

[Hilfstext](#)

Stufen		Jährliche Einkommensbestandteile		Grenzsteuersatz			
Stufe 1	>	0 €	<	13539 €	0 %	+	-
Stufe 2	≥	13539 €	<	21992 €	20 %	+	-
Stufe 3	≥	21992 €	<	36458 €	30 %	+	-
Stufe 4	≥	36458 €	<	70365 €	40 %	+	-
Stufe 5	≥	70365 €	<	104859 €	48 %	+	-
Stufe 6	≥	104859 €	<	1000000 €	50 %	+	-
Stufe 7	≥	1000000 €			55 %	+	-

Das jährliche steuerpflichtige Einkommen entspricht dem jährlichen Bruttoeinkommen ohne Sonderzahlungen minus (Sozialversicherungs-) Beiträgen, ggf. Werbungskostenpauschale. Die Grenzsteuersätze beziehen sich auf die jeweiligen Bestandteile (Stufen) des steuerpflichtigen Einkommens und nicht auf das gesamte steuerpflichtige Einkommen.

Sie haben folgende Möglichkeiten, die Grenzsteuersätze zu verändern:

- Sie können die Zahl und Bandbreite der Einkommensstufen durch Hinzufügen (Schaltfläche +) oder Entfernen (Schaltfläche -) von Zeilen und durch Veränderung der Zahlenwerte simulieren.
- Sie können die bestehenden Grenzsteuersätze für die Einkommensstufen verändern.

European Centre: Tasks & Analyses

EUROMOD & SORESI: National country team for Austria

- Creation of input data from EU-SILC
- Updating tax/benefit policies (parametric/structural changes; new policies)
- Validation and Country Report
- Providing national expertise to JRC, etc.

Simulating fiscal and distributional effect of tax/benefit reforms

- Tailor-made analyses for clients (e.g., EC, Ministries, AK, ÖNB-fund; NGOs)
- Modelling hypothetical and actual policy reforms
- Transferring policies from another country
- Interaction of reforms with other policies

Research Examples & Outreach (European Centre 2020-2026)

- Modelling a higher Employment Rate among Older Workers
- Effects of COVID-19 Crisis on Child Poverty
- Simulation of an Increase of the Minimum Pension Top-Up
- Simulation of an Introduction of a Basic Security for Children
- Study on Intergenerational Fairness
- Non-take-up of Social Assistance and Minimum Income Benefit

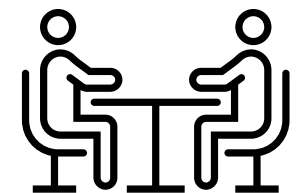
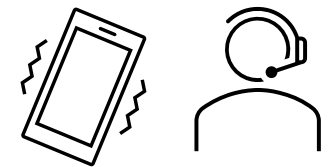
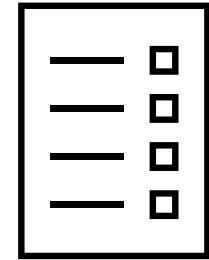
Current project: higher employment rate among older workers:

- LMA add-on in EM: increase employment rates 55-64 based on assumptions (from unemployed, inactive, or retired)
- EM calculates (additional) gross incomes, direct taxes and contributions, indirect taxes
- Finally, additional pension expenditure resulting from increased contributions is roughly estimated outside EM

National survey research

Feasibility studies for new surveys

Review	How is the topic approached in other countries, in international studies, in subnational studies? • Definition of the concepts • Comparison of study design	Which research already exists about the topic in the respective country?	Recommendations for a national survey
Design	Which recommendations do national and international experts have for setting up a national survey?	Development and testing of the survey instrument	



Project example: Older Persons Affected by Violence and Abuse

Huge variation in survey design, types of violence measured, data collection methods applied, sample size etc.

Issues to be considered when designing a survey for estimating the prevalence of violence against older people

- Types of violence to be included (e.g. structural, technology-related, financial)
- Methods to recruit participants and to collect data: What are the advantages and caveats of different data collection methods (e.g. self-administered questionnaire on paper or online, face 2 face data collection)?
- Those who are most at risk of victimisation are the most difficult to reach: How can older persons living in residential care or those without the ability to independently answer a survey be included?
- Language is key: How to introduce sensitive issues and how to formulate questions?
- Help-lines as key support mechanism: How can participants who are identified as victims be supported and how can re-traumatisation be avoided?

 Bundesministerium
Arbeit, Soziales, Gesundheit,
Pflege und Konsumentenschutz

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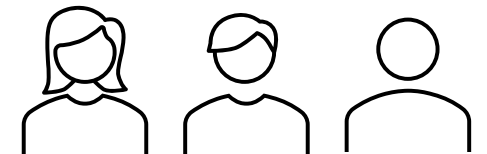
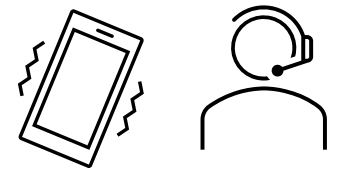
Consortium led by the European
Centre, including
Austrian Interdisciplinary
Platform on Ageing (ÖPIA) &
Institut für Konfliktforschung IKF

Qualitative data collection methods

Document analysis, interviews, ethnographic research, focus groups, case studies (relying on mix of data collection methods), participatory research and co-design...

Key methods we use frequently:

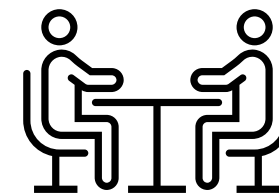
- Semi-structured interviews to gather **factual information**, online or in person
- Semi-structured interviews to gather data on **personal experiences**, online or in person
- Focus groups to **observe dynamics and exchange of perspectives** within a group discussing a specific topic, online or in person



Project examples of qualitative data collection methods

Current projects using semi-structured interviews and focus groups:

- **InfoCare** – **Good practices in supporting informal carers Lessons from well-developed formal LTC systems** interviews with policy makers, self-advocacy organisations of informal carers and researchers;
- **EGRUiEN** – **Encouraging a Digital and Green Transition through Revitalised and Inclusive Union-Employer Negotiations** interviews with social dialogue partners, employers, workers' representatives;
- **FELM** – **Fair Labour Mobility EU: Counselling Network and Research for Mobile Migrant Labour** interviews with experts working in counselling centres;
- **DIA** – **Study on the use of Distributional Impact Assessment and social checks in EU Member States** interviews with employees of Ministries;
- **ELA Lot 2** – **Analytical and Methodological Support in Qualitative Analysis, Mapping and Mixed Methods** focus groups with stakeholders, social partners, enforcement agencies.



Peer Learning

Method for:

- *Facilitation of **learning across countries***
- *Identification of **challenges** in relation to a social policy topic*
- *Presentation & discussion of **policy approaches in different countries***
- *Participants from the relevant **Ministries in several countries***
- *Building of networks of experts across countries*

Steps:

1. Definition of peer learning event topic
2. Development of event concept
3. Thematic input
4. Host country and peer country reports
5. Development of questions for working groups
6. Event facilitation and documentation

Implementation on the EU level:

- **Peer reviews** (host country and peer countries)
- **Mutual learning events** (bringing together participants from all EU Member States)

Adaptation for Bridge Building activities online:

- European Centre Bridge Building activities: BB Policy/Peer Reviews

Project example: Framework contract Peer Reviews and Mutual Learning Activities in Employment, Social Affairs and Inclusion

Recent peer learning events:

- Mutual learning workshop on 'evidence and monitoring in long-term care' (Brussels, Belgium, 17-18 March 2026)
- Mutual learning workshop on 'access to social protection: coverage and contributions for the self-employed' (Brussels, Belgium, 28-29 April 2026)
- Learning exchange on 'regulation of new forms of work in the digital economy – platform work' (Vilnius, Lithuania, 2-3 July 2026)



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Monitoring and Evaluation

- **Monitoring** — continuously tracking what is happening: who is reached, with what activities, with what resources
- **Evaluation** — making sense of that: is it working, for whom, why, and what should change?
- M&E asks: Is the policy/program/ project reaching the right people? Is it doing what it promised? What are the impacts?
- Provides:
 - a reliable factual basis for decision making
 - early warning when something is not working
 - stronger data and reporting routines for the organisations delivering the work
 - comparability over time, so each funding round learns from the last



Example: Accompanying evaluation "Roma Empowerment for the Labour Market"

- **Project Overview**

- Austrian Federal Ministry of Labour and Economy; special directive Roma Empowerment for the Labour Market 2022–2030
- Interventions funded: career counselling, job-application support, training programs, legal guidance, etc.

- **European Centre's contribution**

- Continuous review of project monitoring data; qualitative assessment of implementation; cross-project comparison and synthesis

- **Project outcomes**

- 8 of 9 projects achieved or exceeded their targets, reaching 1,416 participants (54% women)
- Counseling/advising was the strongest element of most projects, with most projects exceeding their targets
- Training measures were most successful when they had a low barrier to entrance

- **Evaluation Takeaways**

- Importance of data harmonization (comparability)
- Limits of harmonized data (comparison of heterogeneous projects)
- Long time horizon and periodic feedback are beneficial for project teams and directive success

Conclusions

Our presentation shows that there is a need for us as researchers to use a diverse set of methods and tools to contribute at different stages of policy formation and intervention, including

Identifying and raising awareness to existing and/or emerging social issues that need policy attention

Monitoring and assessing current policies

Comparing contexts and environments to enable policy learning

Advise on potential policy pathways and solutions

Questions for discussion

- What methods and tools have you been using in your policy work? How have they been used?
- Which methods and tools have been the most useful and in what way? Can you give us examples of policy work (design, enforcement, reform etc.), where the value of the used methods and tools was observed?
- What other methods or tools would you suggest and how can they be integrated in research and policy analysis work?



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