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"Strengthening capacities to support active aging in the conditions of the 21st  
century Peer mentoring program for people 50+" - PeerTrain



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## WHAT WORKS IN THE FIELD OF MENTORING SERVICES FOR PEOPLE 50+?

### Introduction

Almost every European country is dealing with population ageing (Eurostat, 2020). In fact, 41.7% of the EU27 population is 50 or older. For this project's partner countries, the percent of their population that is 50 or older is as follows (Eurostat, 2022): 42% for Bulgaria, 44.9% for Germany, 39.5% for Hungary, 37.7% for Poland, 43.5% for Portugal, and 36.4% for Slovakia.

These demographic changes will impact most aspects of society and economy, from housing and healthcare to the demand for goods and services (Eurostat, 2020). Additionally, the elderly is one of the population groups that is more likely to be at risk of poverty and social exclusion partly because of healthcare expenses (United Nations Department of Economic and Social Affairs, 2016). Old-age exclusion "leads to inequities in choice and control, resources and relationships, and power and rights in key domains of neighbourhood and community; services, amenities and mobility; material and financial resources; social relations; socio-cultural aspects of society; and civic participation" and "implicates states, societies, communities and individuals" (Walsh et al., 2016, p. 93). Notwithstanding, it is also true that the number of older people dealing with social exclusion and poverty appears to be decreasing (Eurostat, 2020). Furthermore, when it comes to the elderly, peer mentoring is quite relevant. Not only does it, as all peer learning, prevent drop out, it aids the elderly in developing relational competences (Baschiera & De Meyer, 2016). Due to the aforementioned reasons, it is particularly pertinent to identify policies as well as good practices using peer mentoring towards active ageing to promote understanding of how they can be adapted and implemented in other countries.

### *Active ageing*

Active ageing as defined by the World Health Organization (WHO) is the process in which opportunities for health, participation, and security are optimized towards enhancing the quality of life of people as they age (WHO, 2002). Moreover, the European Commission (2012) defines active ageing as also being positive in the regard that, by ensuring it, older people will also remain active contributors to the economy and society. This is particularly relevant as some experts have warned that the high numbers of older people in society pose economic challenges due to the old-age dependency ratio (Eurostat, 2020). That is, the existence of a growing number of older people in comparison to the working-age population results in economic unsustainability.

According to Antunes *et al.* (2015), the core competencies to be promoted for active ageing are learning, civic and community, health, emotional, financial/economic, and technological. When it comes to learning, older people tend to participate more in non-formal learning rather than



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formal learning. Additionally, their participation in learning tends to decrease with age. Third Age Universities play a vital role in keeping older adults involved in learning. Civic and community competencies can be supported by “flexible retirement transitions, supporting volunteering opportunities, recognising and rewarding family care, and valuing creative activity” (Antunes *et al.*, 2015, p. 13). Health needs to be promoted but also needs to consider age and health status diversity. Some older people have, for instance, more mobility issues than others. Emotional wellbeing is impacted by changes to the family structure, independence (or lack thereof), feeling of being in control, being autonomous, and participation in other activities that reduce loneliness. Financial/economic is mostly impacted by the labour market participation in older adults. Finally, technological, digital skills among older adults are important because in today’s interconnected world, technology allows people to be autonomous, to be socially and even politically active, and to keep contact with loved ones that live far away.

### ***Peer Mentoring***

Peer mentoring is distinguishable from traditional mentoring in the regard that there is no hierarchical aspect: the mentor and the learner are equals (Holbeche, 1996). This form of mentoring thus acknowledges that peers are able to learn from and aid each other (Holbeche, 1996). Thus, when it comes to peer mentoring and peer learning, many different proximal development zones intersect and overlap thus making peer mentoring a format that allows for sharing and exchanging knowledge and skills whilst allowing space for autonomy (Baschiera & De Meyer, 2016).

Furthermore, peer mentoring programs aiming at promoting active ageing do highlight the importance of the learner’s experience, the relationships developed and created within these programs as well as defining learners’ empowerment as core to the educational process (Baschiera & De Meyer, 2016). Thereby, “peer to peer education becomes, thus, as a social process that sustains a lot of different relationships: cooperation, collaboration, mutual interdependence in contexts of formal learning as well as non-formal and informal learning, according to four direct principles: social skills education, active citizenship education, cultural education, and empowerment education” (Baschiera & De Meyer, 2016; p. 183). This means that by default, peer to peer education includes at least three of the aforementioned competencies for active ageing: learning, civic and community, and emotional.

Some skills have been identified as being necessary for successful mentoring partnerships. The Philips-Jones’ (2003) model identifies 14 skills to this end. Of these, 5 are mentee-specific: Acquiring mentors, Learning quickly, Showing initiative, Following through, and Managing the relationship. 5 are mentor-specific: Instructing/Developing Capabilities, Inspiring, Providing corrective feedback, Managing risks, and Opening doors. And, lastly, 4 are important for both





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mentors and mentees to have: Listening actively, Building trust, Encouraging, and Identifying goals and current reality.

The Peer-Train Project tackles the necessity to promote active ageing and lifelong learning through easy to access peer-mentoring for people 50+. Additionally, peer-mentoring also can serve so people can be inspired by others who experience similar life situations, and have displayed a good coping strategy or even have professional experience in a particular subject. This project is directed both to experts and people 50+ who are interested in becoming a peer mentor or a mentee. To this end, the project will produce 4 results, with this article being a part of the first result: "What Works in the field of Mentoring Services for People 50+?".

To create this first result and to use it as a foundation for the following result, the following was done:

- Firstly, we conducted a literature review, including the partner countries' national policies/strategic documents regarding active ageing;
- Secondly, beneficial/good practices implemented in the partner countries were collected and later critically read according to the model of competencies for active ageing (Antunes et al., 2015);
- A survey by questionnaire, based on the Skills for successful mentoring of Philips-Jones (2003), was applied to establish which skills are particularly valued by stakeholders (e.g., adult educators) and potential learners (i.e., individuals 50+) and compare and contrast them, not only in general, but also according to the sample country.

### National Strategies for Active Ageing

The goal of the European policy on active ageing is to build a social and physical environment of participation in society, allowing the elderly to have an active, healthy and independent lifestyle. For this to be possible, it is necessary to have access to medical and financial assistance, to prevent poverty, to provide living and housing conditions and access to technologies (Council of the European Union, 2012; European Commission, 2012). There are several principles that the European Union points to for the success of the previously objective - the first - is to establish the right to education, training and lifelong learning so that they can continue to be an active part of society and remain present in the labour market. The main areas that the European Union expect that the EU member states pay attention and develop policies in their countries are: economic activity (pension forms, digital upskilling, safe workplace), social participation (internet access and involvement in society), health and well-being (access to healthcare services and health prevention), long-term care (quality of services) and supportive environments (housing, transportation and financial independence). Following this policy, the partner countries have developed their own National Strategies: Bulgaria's National Strategy for Active Ageing in



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Bulgaria (2019 – 2030), Germany’s National Continuing Education Strategy in the Area of Active Ageing, Hungary’s National Strategy on Ageing, Poland’s Assumptions of the Long-Term Senior Policy in Poland for the years 2014–2020, Portugal’s National strategy for an active and healthy ageing in the period of 2017-2025, and Slovakia’s National Program for Active Aging for the years 2021 – 2030<sup>1</sup>. Nevertheless, the existence of these policies/strategic documents doesn’t necessarily mean that active ageing is really being promoted in the country.

### Beneficial/good Practices

To understand the countries’ offers regarding courses and training for Peer Mentoring for Active ageing, 19 practices were collected in total. All partners contributed with 3 or 4 practices.

Bulgaria collected the VAL.oR project; the EUPIN project, and the Easy ways to transfer knowledge project. Germany collected the “Healthy and active ageing” project; Service Point "Digitisation and Education for Older People”, and the KOSIS Project. Hungary contributed with Age-friendly Municipality Award; Senior Centrum, and Work for yourself from today! Poland collected the Third Age Universities (TAU) and Seniors in Action; EuBiA project; and MATURE project. Portugal collected 4 good practices: PEER - Dare to be wise, ICTskills4all; FAITH; and Sol Poente. Slovakia collected the practices "Take your chance" project; the Educational programme - Age management counsellor; and the Learning of Seniors in the Digital Society project.<sup>2</sup>

The first step was to identify which of the core competencies for active ageing were being promoted in these practices. These competencies are Learning, Civic and Community, Health, Emotional, Financial/Economic, and Technological (Antunes *et al.*, 2015). Once again, we would like to highlight that as the practices are not comprehensive, the results are not necessarily indicative of the countries' universe.

On a first look, we can see that in one way or another all the practices promoted active ageing. Additionally, we could immediately identify that, even if it wasn’t their main focus, nearly all of the practices (18), directly or indirectly, promoted the Civic and community competencies necessary for active ageing as well as Emotional competencies (17), and Learning (15). Around half the collected good practices promoted Technological competencies (10). The Financial/economic competencies (4) and Health (4) competencies were found less often.

When looking at the practices collected by the partners, we can underline that all of them promoted more than one of the core competencies for active ageing. Furthermore, the practices respect the adult education principles, and have developed a diversified set of approaches from

<sup>1</sup> For more detail on the National strategies please see the extended version of this result.

<sup>2</sup> For summaries of the selected practices please see the extended version of this document.

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experience sharing, creative activities (e.g., theatre), and some of them have implemented mentoring approaches, as we illustrate below:

- VAL.oR - a mentoring program was used towards encouraging adults, including older adults, to participate in training and international exchanges. This practice thus promoted the following competencies for active ageing: Learning, Civic and community, and Emotional.
- Work for yourself from today! - personalised mentoring sessions were used towards promoting entrepreneurship among people over 50. This practice promoted the following competencies of active ageing: Learning, Civic and community, Emotional, Financial/economic, and Technological.
- PEER - used peer-to-peer learning in its online learning platform and enabled collaborative learning, thereby promoting Learning, Civic and community, Emotional, and Technological.
- ICTskills4all - used intergenerational and peer-to-peer educational programs to improve digital skills in older adults. It promoted Learning, Civic and community, Emotional, and Technological.
- FAITH - trained older adult with high digital skills to become peer mentors, therefore promoting Learning, Civic and community, Emotional, and Technological competencies.
- Sol Poente - uses peer-to-peer training and group dynamics as methodologies within a health education program, thus promoting Learning, Civic and community, Emotional, and Health competencies for active ageing.
- "Take your chance" - supports organisations in the training of a new disadvantaged employee (e.g., an older unemployed person), under a mentoring training. It promoted Learning and Civic and community competencies for active ageing.

We can conclude that many different methodologies can be used and combined towards promoting active ageing competencies. Whilst our sample is not comprehensive and thus not representative, we can, nevertheless, highlight that, the presence of 7 references to mentoring practices in our sample, which was mostly focused on collecting practices for active ageing, highlight the utility and relevance of this project and that mentoring is indeed a good approach to promote active ageing, be it on a more traditional mentoring approach with an older mentor (Aresi & Weaver, 2020), or when the mentor is a more experienced peer (Active Ageing Project, 2018, Baschiera, & De Meyer, 2016).

## Survey results

In total, 246 people participated in the survey, half being mentors and half being people aged 50 or more. The average age of the experts was around 55 years ( $M=54.73$ ,  $SD=9.95$ ) and of the people aged 50 or more was around 63 ( $M=62.8$ ,  $SD=9.25$ ). On average stakeholders had 17 years of







experience in working with adults ( $M=17.49$ ;  $SD=10.24$ ). Each partner collected 20 to 23 surveys per group (i.e., stakeholders and people 50+). In these surveys the participants had to rate the skills for successful mentoring (Philips-Jones, 2003) on a Likert scale from 1 (Not at all) to 5 (Completely). All the samples collected were of convenience and thus might not be representative.

### ***Results of the Stakeholder questionnaire***

Regarding the answers related to the skills of mentors and mentees, from the survey of the stakeholders working with individuals aged 50 or plus, we obtained the following results.

In general, all results received quite good ratings, as most of the obtained results rounded 4 or above, meaning they were either considered very important or completely necessary. Concerning the skills specific to mentors (i.e., Providing corrective feedback, Instructing/Developing capabilities, Inspiring, Managing risks, and Opening doors) the participants unanimously considered all of the skills as completely necessary, giving them more than 4.5. In the skills specific to mentees (i.e., Acquiring mentors, Showing initiative, Learning quickly, Following through, and Managing the relationship), two of them were perceived as very important: Acquiring mentors ( $M=4.37$ ,  $SD=0.84$ ) and Learning quickly ( $M=3.69$ ,  $SD=1.04$ ). Finally, concerning the 4 skills that were in common to both mentors and mentees (i.e., Active listening, Building trust, Encouraging, and Identifying goals and current realities) every single one was considered completely necessary in the joint results, obtaining an average close to 5 ( $M>4.5$ ). It's worth noting, however, that the skill Encouraging for the mentees was only evaluated as very important ( $M=4.36$ ,  $SD=0.87$ ).

The Bulgarian sample considered all skills to be completely necessary for successful peer-mentoring ( $M>4.5$ ).

The German sample evaluated the five mentor-specific skills as completely necessary ( $M>4.5$ ). For the mentee-specific skills four of the five were rated as very important: Acquiring mentors ( $M=3.84$ ,  $SD=1.26$ ), Learning quickly ( $M=4.05$ ,  $SD=1.32$ ), Following through ( $M=4.32$ ,  $SD=0.75$ ), and Managing the relationship ( $M=4.15$ ,  $SD=0.81$ ). The fifth mentee-specific skill, Showing initiative was evaluated as completely necessary ( $M=4.8$ ,  $SD=0.41$ ). For the shared skills, all were rated as completely necessary ( $M>4.5$ ) with the exception of Encouraging which was perceived as very important ( $M=4.44$ ,  $SD=0.91$ ).

The Hungarian sample generally rated the skills highly. The Hungarian participants rated all skills as completely necessary ( $M>4.5$ ) except the mentee-specific Learning quickly which was evaluated as somewhat necessary ( $M=3.25$ ,  $SD=0.91$ ).

The Polish sample tended to overall rate all skills as very important with the exception of five skills. Four skills were rated as completely necessary ( $M>4.5$ ), these were two mentor-specific





skills: Providing corrective feedback ( $M=4.74$ ,  $SD=0.54$ ) and Inspiring ( $M=4.57$ ,  $SD=0.59$ ), and the shared skills of Building trust ( $M=4.72$ ,  $SD=0.50$ ) and Listening actively ( $M=4.57$ ,  $SD=0.72$ ) highlighting their necessity for successful peer mentoring programs. The last skill, the mentee-specific skill of Learning quickly was evaluated as somewhat important ( $M=3.43$ ,  $SD=0.84$ ).

Regarding the Portuguese sample, skills were, once again, generally perceived as completely necessary for peer mentoring ( $M>4.5$ ). When it comes to mentor-specific skills, only Opening doors was rated as very important ( $M=4.05$ ,  $SD=0.83$ ). For the mentee-specific skills, only Learning quickly was rated as somewhat important ( $M=3.1$ ,  $SD=0.79$ ), and the skills of Acquiring mentors ( $M=4$ ,  $SD=0.73$ ) and Managing the relationship ( $M=4.3$ ,  $SD=0.8$ ) were evaluated as very important. The other two mentee-specific skills (i.e., Showing initiative and Following through) were considered completely necessary ( $M>4.5$ ). As for the shared skills, Listening actively, Building trust, and Encouraging were perceived as completely necessary ( $M>4.5$ ). Identifying goals and current realities was perceived as very important ( $M=4.46$ ,  $SD=0.64$ ).

Lastly, the Slovak sample highly valued mentor-specific skills, giving them all close to the maximum notation ( $M>4.5$ ). This was not the case for the mentee-specific skills, in which all the skills but one being rated as very important ( $3.5<M<4.5$ ). Indeed, only Acquiring mentors was evaluated as completely necessary ( $M=4.5$ ,  $SD=0.61$ ). When it comes to the shared skills all but Encouraging were evaluated as completely necessary ( $M>4.5$ ), and Encouraging was considered very important ( $M=4.44$ ,  $SD=0.94$ ).

### ***Results of the 50+ questionnaire***

Concerning the answers to the survey for individuals aged 50 or more and regarding the importance of the mentor-specific skills, the following patterns emerged.

In general, all skills were highly valued among respondents, with nearly all obtaining an average close to 5, thus meaning they were considered as completely necessary for successful peer-mentoring. The only exceptions were three mentee-specific skills and one shared skill. Indeed, when it comes to the 5 mentor-specific skills (i.e., Providing corrective feedback, Instructing/Developing capabilities, Inspiring, Managing risks, and Opening doors) all neared the maximum of the scale ( $M>4.5$ ). For the 5 mentee-specific skills, 2 were considered completely necessary ( $M>4.5$ ) which were Showing Initiative and Following through. The rest were considered to be very important: Learning quickly ( $M=3.79$ ,  $SD=1.2$ ), Managing the relationship ( $M=4.4$ ,  $SD=0.89$ ) and Acquiring mentors ( $M=4.4$ ,  $SD=0.8$ ). As for the shared skills, all but





Encouraging were considered completely necessary and Encouraging ( $M=4.43$ ,  $SD=0.84$ ) was considered very important.

In the Bulgarian sample, all skills (i.e., mentor-specific, mentee-specific, and shared skills) were evaluated as completely necessary for successful peer mentoring ( $M>4.5$ ).

When it comes to the German sample, a similar pattern was observed with all skills except for two mentee-specific skills having been evaluated as completely necessary ( $M>4.5$ ). The two exceptions were the mentee-specific skills of Following through ( $M=4.4$ ,  $SD=1.05$ ) and Managing the relationship ( $M=4.42$ ,  $SD=1.02$ ) which were evaluated as very necessary.

Hungarian sample's results on the 50+ survey showed that seven skills were rated by all participants as completely necessary for successful mentoring ( $M>4.5$ ), these were the mentor specific skill of Providing corrective feedback and Managing risks, the mentee-specific skill of Managing the relationship, and the shared skills of Building trust and Identifying goals and current reality. The mentor-specific skill of Inspiring ( $M=4.26$ ,  $SD=0.65$ ), and the shared skill of Encouraging ( $M=4.3$ ,  $SD=0.72$ ) were both evaluated as very important. Finally, the mentee-specific skill of Learning quickly was perceived as somewhat important ( $M=2.7$ ,  $SD=0.92$ ).

The Polish sample generally obtained scores closer to 4 on the Likert scale. The exceptions which had scores closer to 5 (i.e., evaluated as completely necessary) were the mentor-specific skills of Inspiring ( $M=4.78$ ,  $SD=0.52$ ), Instructing/Developing capabilities ( $M=4.7$ ,  $SD=0.47$ ), and Providing corrective feedback ( $M=4.65$ ,  $SD=0.57$ ); as well as two shared skills, that of Building trust ( $M=4.7$ ,  $SD=0.73$ ) and Listening actively ( $M=4.63$ ,  $SD=0.83$ ). It is also due noting that the shared core skill of Identifying goals and current reality was considered more important for mentors ( $M=4.61$ ,  $SD=0.5$ ) than for mentees ( $M=4.3$ ,  $SD=0.7$ ).

Similarly, most of the skills averaged closer to 4 (i.e., very important) in the Portuguese sample. The exceptions were the mentor-specific skills of Providing corrective feedback ( $M=4.65$ ,  $SD=0.59$ ) and Instructing/Developing capabilities ( $M=4.5$ ,  $SD=0.61$ ), the mentee-specific skills of Following through ( $M=4.95$ ,  $SD=0.22$ ) and Showing initiative ( $M=4.7$ ,  $SD=0.47$ ), and the shared skills of Active listening ( $M=4.75$ ,  $SD=0.49$ ) and Identifying goals and current reality ( $M=4.63$ ,  $SD=0.54$ ) which were perceived as completely necessary.

Finally, when it comes to the Slovak sample of people 50+, it was obtained that all skills were highly valued with most being evaluated as completely necessary ( $M>4.5$ ). Three mentee-specific skills were evaluated as very important: Learning quickly ( $M=4.25$ ,  $SD=0.9$ ), Acquiring mentors ( $M=4.43$ ,  $SD=0.81$ ), and Managing the relationship ( $M=4.44$ ,  $SD=0.79$ ).







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We can thus conclude that all skills were generally rated, across all samples, as being very important or completely necessary for successful peer-mentoring programs.

### ***Comparison of Stakeholder and 50+***

Broadly speaking, no differences in how skills were rated between stakeholders and people 50 or older with the sole exception being the shared skill Encouraging which stakeholders rated as completely necessary (M=4.55, SD=0.74) and 50+ rated as very important (M=4.43, SD=0.84)<sup>3</sup>.

### **Conclusions**

All countries have national strategies for active ageing following European policy, however this does not necessarily mean they are promoting active ageing as policy and strategic documents may not end up being applied in reality.

We proceeded to collect beneficial/good practices and considering the tried and tested model of competencies for active ageing by Antunes *et al.* (2015), we critically read them and identified which core competencies for active ageing they promoted. All the practices promoted more than one competency of active ageing. Furthermore, 7 of our practices used a mentoring approach towards promoting active ageing, which highlights its utility to this end (Active Ageing Project, 2018; Aresi & Weaver, 2020; Baschiera & De Meyer, 2016).

Additionally, the partnership collected surveys by questionnaire aimed at both stakeholders (e.g., adult educators) and people aged 50 or more in which they had to rate, in a Likert scale, the core skills for successful mentoring as per Philips-Jones (2003). The surveys corroborated that these skills are considered very important as they all obtained, overall, scores of 4 or 5, which means they are completely necessary or very necessary for successful peer mentoring.

This not only highlights the relevance of PeerTrain but the project can also learn from the practices and see how these skills were promoted and adapt and implement similar methodologies. Furthermore, it must facilitate the promotion of the aforementioned skills and competencies, which were already theoretical defined as being crucial and which our results corroborated, when developing the project's training modules.

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<sup>3</sup> For more information and to see stakeholder and 50+ comparisons per each partner country, please see the extended version of this result.



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