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Marvin Formosa
Editor

The University of the Third Age and Active Ageing

European and Asian-Pacific Perspectives

 Springer

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This book is dedicated to all educational gerontologists for subscribing to the dictum that learning is living and that living is learning.

Foreword: The Largest University in the World

In the late 1980s, while I was working on my Ph.D. dissertation on the scientific and political history of gerontology, I became aware that the concept of ageism, having just surfaced academically in the 1970s, was undergoing a transformation. Critics began targeting ‘positive’ as well as ‘negative’ ageist images and narratives that divided or discriminated against older groups. The well-meaning gerontological vocabulary of ‘positive’, ‘active’ and ‘productive’ ageing was being appropriated by health and retirement markets capitalising on ‘active lifestyles’ populated by prosperous, independent and resourceful older adults. While such portrayals replaced the dowdy and depressing ones of the past, they also conveyed the new age of ageing as one in which people seemed to grow older without ageing and realistic or dignified representations of older people challenged by dependency or disability were absent from view. Centuries of moral debates about the universal virtues of ageing had morphed into a very commercialised one about ‘successful’ ageing.

Yet, there was a new age of ageing upon us with unprecedented demographic ramifications. The lengthening of the longevity curve and benefits of pension policies and medical technologies in the Western world had recreated retirement as an enlivened stage of life rather than entry to its ending. The affluent consumerism of post-war economies shaped a growing ‘boomer’ generation born between 1946 and 1964, who would develop distinctive lifestyles and tastes that extended their sense of rebellious youthfulness. Social thinkers, as they caught up with the new or post-traditional ageing, looked for language to describe it, such as the ‘post-modern life course’ (Featherstone & Hepworth, 1991), or more recently, the ‘midlife industrial complex’ (Cohen, 2012) and ‘encore adulthood’ (Moen, 2016). But no term stuck as well as ‘the Third Age’, as it was labelled in Europe and the UK, to describe a ‘fresh map of life’ (Laslett, 1989) wedged between the second age of youth and the fourth age of old age. The Third Age was characterised as a creative and active period overturning outmoded conventions about disengaging or slowing down during the retirement years. As Peter Laslett (founder of the British U3A movement) wrote, ‘blanket phrases, which include “the Elderly,” “Senior Citizens,” “The Retired,” and so on, have ceased to be appropriate now that the vital necessity

of recognizing differentiation during that lengthy phase of life has become apparent' (1995: 10).

After my Ph.D., I began a project to identify new sites of Third Age emergence in travel, business, housing, fashion and the arts. I was looking for cultural manifestations of the new ageing that were not restricted to the positive/negative or active/dependent binaries churning through popular culture. I had heard about Universities of the Third Age (U3A), but it was my father-in-law, Colin Stamp, whose descriptions of his classes about religion and ethics organised by the U3A in London, who inspired me to look closer at U3A-style lifelong learning. The first U3A or *Université du Troisième âge* was founded in Toulouse, France in 1973, followed by the establishment of the International Association of Universities of the Third Age (AIUTA). The first British U3A, inspired by the French model, began at Cambridge in 1982. As I learned about U3As in the UK and elsewhere, I realised that collectively they were the largest university in the world, yet were hardly acknowledged in gerontological research nor noticed by most traditional universities catering to younger students.

At first glance, U3As seemed like an unequivocal success, not only as inventive and inexpensive adult education, but also as a forum for local social reform. Branches are self-governed, decisions are collectively made, classes held in local spaces or members' homes, and no prerequisite experience or educational qualifications are required, nor are credentials, certificates, or degrees offered. U3A courses are based on interest and the love of learning, without the need for admission tests nor performances scores. I visited London and attended Colin's classes, interviewed some key U3A leaders such as Peter Laslett and Eric Midwinter, and read through U3A archives and newsletters whose access was kindly offered to me by the U3A London office. Clearly, the U3A experience for many people was the conduit through which they became Third Agers. After teaching university classes of young people for decades, I was fascinated to see how higher education could be retooled for middle-aged and older people too. Indeed, the 'senior power' behind the U3A movement shared many of its characteristics with other groups in which I was interested that looked to community resources to supplement diminishing social supports.

At the same time, by the turn of the millennium, Laslett and other figures in the U3A movement became accused of advocating 'third ageist' lifestyle priorities over economic and political issues, and for glorifying the positivity of the Third Age at the expense of the Fourth Age (Biggs, 1997; Blaikie, 1999; Gilleard & Higgs, 2000). Haim Hazan's (1996: 33) ethnography elaborated the interpersonal discourses and rituals through which Cambridge U3A participants fashioned their identities as a kind of 'buffer zone' between middle age and old age. He claimed that members were encouraged to 'abandon conventional parameters of time, space, and meaning and to reconstruct their own' (ibid., : 51). For Hazan and other U3A critics, this experimentation also encouraged an anti-ageing and death-denying atmosphere. Once again, a very positive outcome of the new ageing seemed to embody its own contradictions, as the energies, boldness and radicalism of the Third Age seemed to sharpen the boundary, even as it pushed it further away,

between it and the Fourth Age, imagined as a reverse mirrored lifeworld darkened by loss, passivity and dependency (Gilleard & Higgs, 2010).

In my own work, I wrote about how the U3A administration handled tensions such as central versus local politics, research versus non-research activities and commercial versus educational interests (Katz & Laliberte-Rudman, 2005). But obviously much more needed to be written about Universities of the Third Age in order to encapsulate their global breadth as an expression of the Third Age itself, in all of its prospects and contradictions. Hence, we are very fortunate that Marvin Formosa, who has devoted his career to researching and consulting about older adult learning and the worldwide foundations of Universities of the Third Age, decided to put together this timely and comprehensive volume, *The University of the Third Age and Active Ageing: European and Asian-Pacific Perspectives*. The book's 21 chapters all contribute to the deep well of histories, experiences, structures, accomplishments and problems of national U3As. But each chapter can also be read separately as an absorbing story about special communities that have embraced the principles and exuberance of lifelong education and seek to understand, acknowledge and support it.

Overall, this book is a wonderful forum for its contributing authors, ranging from across European and Asian-Pacific countries to exchange ideas, learn from each other and respond to the critics. It is a massive amount of material; however, Formosa's exemplary editorial work, introductory and concluding chapters give readers the contexts and pathways to navigate the globalised U3A world as an exciting one of discovery. The book also leaves us with big questions about the meaning of lifelong education: How should it be organised and by whom? What will be the effects of digital and online learning technologies? Where should political activism and advocacy be part of U3A mandates? How can diversity be encouraged? Should U3As continue to identify with a Third Age against a Fourth Age? What does a shift in perspective from richer to poorer countries mean for the U3A movement? What other benefits to older adults can U3As provide beyond learning? How can U3As negotiate tensions between traditional and post-traditional cultures of ageing? These questions and more are integrated into Formosa's insightful conclusions gathered into his idea of U3A renewal; that it is time for the U3A movement to catch up to the myriad of changes occurring amongst ageing populations today, as it had once done as an innovative response to them in the past, and that we move from 'lifelong learning' to 'longlife learning'.

Engaging with these and other critical issues should make readers appreciate and enjoy this book as much as I have, seeing it as a tapestry of extraordinary research that offers to guide the U3A movement as it soon enters its fiftieth year, after which time its membership will swell with people for whom Universities of the Third Age will have always existed as an opportunity to never stop learning.

Peterborough, Canada

Stephen Katz

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Preface

My personal and academic interest in Universities of the Third Age (U3As) can be traced back to the mid-1990s when, as a postgraduate student at the University of Malta, I was researching the field of adult education, which led me to the field of educational gerontology. At that time, without Internet search engines at our disposal, rummaging for academic material on the field of older adult learning was truly a creative and resilient quest. I remember writing letters—the traditional way—to Frank Glendenning, Malcolm Johnson, Keith Percy, Alexandra Withnall, Chris Phillipson and other leading academics who I felt could provide me with guidance and advice. All responded to my letters, and some even sent me a range of grey literature, for which I am still very grateful, since at that time travel to the UK, and conference fees were beyond my budget. Encouraged by such a response, I carried out my Masters' dissertation in sociology on older adult learning, by conducting a case study of Maltese U3A. The dissertation was well-received and generated a number of articles in peer-reviewed journals, all of which endeavoured to inject a critical twist to the field of older adult learning and U3As in particular. Despite a short hiatus, as I channelled all my energies into completing a Ph.D. in gerontology, researching class dynamics in later life, my academic gaze never left this area, as I remained marvelled by the sheer expansion of the number of older persons engaged in formal, non-formal and informal avenues of learning. Indeed, since the millennium, the opportunities for lifelong learning in later life have proliferated in an unprecedented manner, notwithstanding that many governments have cut back on their public spending on adult education, and that state budgets on education rarely take into consideration the learning needs and interests of older citizens.

This book is, of course, downright testimony that no other enterprise in older adult learning has been as successful as the U3A. Since its inception in 1973, the U3A defied the odds, to now include millions of learners in its fold, and to be present across all inhabited continents, to the extent that today one speaks of a 'U3A movement'. Although comparative statistics are lacking, Australia boasted some 300 U3As, with a membership of around the 100,000 mark, whilst its neighbour New Zealand held 84 U3As with members within the 25 Auckland U3A

community numbering 3,719 in 2017. Figures for Britain reached over 1000 U3As and over 400,000 members in 2018, and a 2013 Interest Group Survey revealed that there are in excess of 36,000 U3A interest groups in the region. In the Asian continent, China alone owned 60,867 U3As and around 7,643,100 members in 2015. The genesis of this book emerged from an intention to take stock of such a state of circumstances—namely to detail the movement’s origins, development and contemporary equilibrium; chart the movement’s impact on older learners’ levels of physical, emotional and social well-being; as well as evaluate the movement’s track record in bringing improved levels of empowerment in later life. Whilst the initial objective was to produce a more comprehensive, international, compendium of chapters, the choice of limiting this book to solely the European and Asian-Pacific settings was based on the fact that whilst U3As in these two continental locations are both highly popular and firmly entrenched in the social fabric, there are only a few U3As in Africa and they are completely absent in the USA. At the same time, language barriers made it difficult for me to locate apposite collaborators from South America. One hopes that such limitations can be rectified in future publications in the foreseeable future.

The choice of the term ‘active ageing’ in the title of the publication was not a coincidental one. The concept of ‘lifelong learning’ is presently positioned as one of the four key pillars underlying the discourse of ‘active ageing’, so that nowadays these two notions have become increasingly interfaced, overlapping and pervasive, to the extent that both the United Nations and the World Health Organization recognise that neither active ageing nor lifelong learning is possible at the expense of the other. Acknowledging that lifelong learning and active ageing resemble the two different sides of the same coin—in its policy document *It is never too late to learn* (European Commission, 2006)—the European Union also drew attention to the need for ‘active ageing’ policies addressing the need for learning both before and after retiring from formal work. Indeed, research has long confirmed that continued learning is a key vehicle for active ageing (Boulton-Lewis & Buys, 2015; Formosa, 2016), whereby it can enable older persons

...gain socio-economic, psychological, and socio-political resources, all of which in turn lead to a healthier life. In addition to better health, older adults engaged in lifelong learning are found to have positive experiences in at least one of the following areas - enjoyment of life, confidence, self-concept, self-satisfaction, and the ability to cope...learning keeps older people involved in enjoying and living life fully.

Tam, 2012 : 165

At the same time, there is some research which provides evidence to support that engagement in learning slows mental decline, as learning boosts brain activity which has the potential to improve neuroplasticity, neural development and new brain cells (Valenzuela, 2009).

A large number of people have played a vital role during the writing of the book. Much gratitude goes to the authors of the chapters in this book. There is no doubt that the success of this volume is due primarily to the commitment with which the chapter authors accepted their obligations and the goodwill with which they

responded to editorial criticism and suggestions. Amongst the chapters' authors, special gratitude goes to Cameron Richards for advising me, correctly with hindsight, to include a 'Pacific' dimension in the book as primarily the focus was an entirely 'European-Asian' one. The book has also benefitted from the input of many colleagues and friends whom I have met during many conferences and study visits throughout the past two decades, especially throughout the annual conference organised by the European Society for Research on the Education of Adults (ESREA), on Education and Learning of Older Adults (ELOA). During such conferences, my debates with Bernhard Schmidt-Hertha, António Fragoso, and Sabina Jelenc Krašovec always served as sources of fresh knowledge, and to recognise various facets of older adult learning through new perspectives. Gratitude also goes to Katie Chabalko and the production team at Springer Publishing for being ever present and available throughout this book's production process.

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Marvin Formosa

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