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IAN FUNNELL

# THE DEVELOPMENT OF U3As & THE BENEFITS TO MEMBERS

I will be writing about the current situation of the U3A Movement in the United Kingdom (UK) and around the world and discussing recent developments. I will address first the history of the U3A Movement over the past forty years, then AIUTA and finally UK developments since 1982. Hopefully I will be able to cover a lot of ground quickly and so leave the reader with some good ideas relevant to their own U3A.

## 1. LIFELONG LEARNING & THE U3A MOVEMENT

The idea of lifelong learning emerged in the first half of the twentieth century and became fully recognised in the 1970s [Smith & Findsen and Formosa]. In 1968 the French government enacted legislation that made universities responsible for the provision of lifelong education and in 1970 UNESCO took up lifelong learning as an important objective; "Learning to be; the world of education today and tomorrow", the Faure Report [Faure], was published by UNESCO in 1972. Then followed the initiative at Toulouse University in 1972 when classes for older people were arranged by Professor Pierre Vellas and colleagues in the late afternoon through the summer period. These classes were so popular that the attendees made known their wish that the classes should be offered on a continuing basis.

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In February 1973 a proposal to create the University of the Third Age of Toulouse was put to the Administrative Council of the International Studies and Development Faculty which had representatives of the professors, the students and the administrators as well as three external members with important international responsibilities: the directors-general of the World Health Organisation (WHO), the International Labour Organisation (ILO) and UNESCO [Vellas]. The goal was to investigate what the university could do to improve the quality of life and state of health of the elderly. The programme was adopted unanimously, although without any specific budget and after preparatory work and consultation four major objectives were to be addressed:

- 1. Raise the level of health and quality of life of older people.
- 2. Realise educational programmes for older people.
- 3. Realise gerontological research programmes.
- 4. Realise gerontological education programmes.

It is clear that all U3As focus on items 1) and 2), while items 3) and 4) have been largely left to universities with perhaps some links to members in interested U3As.

Once Toulouse U3A had been set up Pierre Vellas was very active in spreading the news about the project. New U3As were quickly formed in other regions of France, then in Francophone countries such as Belgium, Switzerland and Quebec and in Italy and Spain. In 1975 AIUTA [See website] was founded with Pierre Vellas as its first president. He was succeeded by presidents from, variously, Belgium, Canada, Switzerland and the United Kingdom, and now the current eleventh president is Professor François Vellas, Pierre Vellas's son, who is also from Toulouse University.

In April 1975 Professor Helena Swarc, University of Warsaw, met Pierre Vellas at a conference on gerontology in Milan. She was given permission to found a U3A in October 1975 and the university joined AIUTA in 1976. Another U3A was founded in Wroclaw in 1976. In 1978 a grant-in-aid from the Ministry of Health and Social Welfare was received which enabled U3As to be founded in Poznan, Szczecin and Opole [Radcliffe]. Now here we are, many years later, remembering and celebrating those events.

The French U3As formed a national body in 1980, Union Française d e s Universités du Troisième Age, which later became Union Française des Universités de Tous Ages; the acronym UFUTA was unchanged [See website].

#### 2. THE INTERNATIONAL ASSOCIATION OF U3AS (AIUTA)

AIUTA has existed from the earliest days of the U3A Movement and it has three aims in its constitution that I summarise as "To federate, to educate and to celebrate". More fully the objectives of this association are 1) To federate, all over the world, the Universities of the Third Age and the organisations, including any, which have different names but do subscribe to its objectives, 2) To constitute, with the support of Universities around the world, an international framework of a lifelong educational nature and concerned with research for, by, and with the old, and 3) To develop the exchange of knowledge that the older generation achieves for the benefit of society as a whole.

From the start AIUTA has aimed to bring countries in the U3A Movement together and to expand its membership to new countries. The number of countries with U3As in membership of AIUTA has been around thirty for some years. It is good to have representatives from around the world but we recognise that the distances involved make membership difficult for many organisations. The members of AIUTA elect its Governing Board for a four-year term at a General Assembly held every two years, with 50% elected each time. The Governing Board which has around twenty members, maximum twenty seven, meets twice each year and organises a conference at the same time as the General Assembly. This year there was a General Assembly and conference in Reims at which the Fortieth Anniversary of the Reims I U T L (Institut Universitaire du Temps Libre) was celebrated. At the same time as Governing Board meetings the host organisation may also arrange a conference. Figure 1 shows a summary of the history of AIUTA conferences with sixteen countries having been hosts, some multiple times. In 2013 we had conferences in Guangzhou, China and Uppsala, Sweden, then in 2014 we had conferences in Toulouse and Foz d'Iguassu, Brazil, and in 2015 we had conferences in Alicante, Spain and Lublin. In 2016 there was a conference in Reims which will be followed by a joint AIUTA/APA conference in Osaka, Japan in October.

In addition to the AIUTA there is a group called the Asia Pacific Alliance of U3As (APA) which organises conferences on an annual basis [See website]. The origin of this informal group was in a meeting held at an international conference organised by the Indian Society of U3As at the Mahatma Gandhi Chitrakoot Gramoday Vishwavidyalaya, India's first rural university, at Chitrakoot in the state of Madhya Pradesh. All the overseas delegates thought it had been an interesting event and agreed to hold an annual conference thereafter – Singapore in 2011, Pune, India in 2012, Melbourne in 2013, Kathmandu in 2014 and Brisbane in 2015. The Indian Society of U3As was founded in 2008 by Professor Raj Kapoor, a retired Vice-Chancellor, who learned of the U3A Movement from the World U3A [See website] which has been encouraging U3A expansion since 1997. The internet makes the world seem smaller and when the U3A in Reykjavik, Iceland [See website] was founded in 2012 by Ingibjorg Gudlagsdottir, who had attended the Chitrakoot conference, she was able to get support and encouragement from other attendees at that conference.

The challenge for the future is to keep providing opportunities for Third Agers to join U3As. First we should note the current low market penetration of U3As into the retired population of the world – more of that below. Then we can look at the statistics of the growth of the over-sixty population. In Figure 2 you can see how the over-sixty population has grown and is predicted to grow over the period from 1950 to 2030. For Poland the over-sixty population increases from 8% in 1950 to 28% by 2030, passing the UK figure in 2016.

The data is provided by Gapminder [See website]; the Gapminder Foundation was founded in 2005 by Professor Hans Rosling from the Karolinska Institute, Stockholm, Sweden. The free down-load software enables anyone to graph economic, geographic and health data against time or against the other variables. The many challenges facing the world are clear, but it is only by having a broad appreciation of such data that agencies can work together to solve the world's problems. I would also like to mention the excellent Technology, Entertainment and Design or TED talks which are readily available on a wide range of topics including a number by Hans Rosling [Rosling]; incidentally I notice that many of the talks have Polish sub-titles. The talks can form the basis of discussion on many topics of interest to U3A members.

The proportion of the retired population who are members of U3As is not readily available. If one chooses a somewhat arbitrary age such as sixty then the numbers in the population over sixty are available for many different countries to use for comparison. In 2015 in China there were 60867 universities for the aged with 7643100 members [Dong]. As the number of people over sixty was around 160 million, the proportion in a U3A in China was 4.8% and the average U3A size was 126 members. As Mr Dong said in Reims the policy of the Chinese Association of Universities for the Aged is to raise the participation rate to 10% by 2020. The comparable figures for UK, Australia and New Zealand in 2010 were respectively 2.4%, 2.0% and 1.4% for market penetration and 364, 367 and 192 for average membership. Of course it is true that many U3As are smaller than average and many others are much larger. Figure 3 shows a size comparison between the same three countries in 2010. The size scale is logarithmic because the U3As varied in size from roughly

10 members to 6000 members and it is clear that New Zealand with its smaller population centres had far fewer large U3As. But it is interesting that every size is represented over the whole range. I hope that they would all be very willing to accept new members and expand opportunities for Third Agers. In China Mr Dong reported that several U3As have between ten and twenty thousand members.

#### 3. U3A DEVELOPMENT IN THE UNITED KINGDOM

The U3A Movement [See Third Age Trust website] has achieved continuous steady growth over the three and more decades of its existence, both in the number of U3As and the number of members. One feature of our development has been the existence of a national affiliating body, the Third Age Trust, ever since the first U3As were founded and the creation of a National Office to support U3As shortly afterwards. The Third Age Trust was registered as a charity in October 1983 and the earliest affiliate, Yeovil U3A, was accepted in the same month.

Figure 4 shows how the membership has grown over a decade from around 140000 to 340000; the annual growth has been around 21000 members and the growth rate has been around 6.5%. Figure 5 shows the growth figures for the twelve regions of the UK and also how the growth is split between the creation of new U3As and the organic growth of the existing U3As.

The U3A Movement is non-religious and non-political and has three main principles – Third-Age Based, Self-help Learning and Mutual Aid. The full text of the principles on the Third Age Trust website has the details but the essential basis is that UK U3As are self-help learning co-operatives where in the words of a founder – "Those who teach shall also learn and those who learn shall also teach" [Laslett].

**The Third Age Principle** – Membership of a U3A is open to all in their third age, which is defined not by a particular age but by a period in life in which full-time employment has ceased. Members promote the values of lifelong learning and the positive attributes of belonging to a U3A. Members should do all they can to ensure that people wanting to join a U3A can do so.

The Self-help Learning Principle – Members form interest groups covering as wide a range of topics and activities as they desire; by the members, for the members. No qualifications are sought or offered. Learning is for its own sake, with enjoyment being the prime motive, not qualifications or awards. There is no distinction between the learners and the teachers; they are all U3A members.

**The Mutual Aid Principle** – Each U3A is a mutual aid organisation, operationally independent but a member of The Third Age Trust, which requires adherence

to the guiding principles of the U3A Movement. No payments are made to members for services rendered to any U3A. Each U3A is self-funded with membership subscriptions and costs kept as low as possible. Outside financial assistance should only be sought if it does not imperil the integrity of the U3A movement.

The Third Age Trust has committees looking at Education, Development, Finance, Governance, IT, Research and International matters. These committees are there to support the Trust but also to develop ideas, policies and practices that will be useful to U3As.

The range of U3A activities can be summarised quite briefly but it must be remembered that the summary covers over 360000 members in almost one thousand U3As with maybe 50000 interest groups and related educational activities. Interest group subjects range from art and archaeology to science and singing and include all the other letters of the alphabet. All knowledge is part of the whole and I remember an excellent talk on archaeology and alphabets in my own science group. Our interest groups often meet in members' homes when there are maybe up to twelve members or in local church halls or village halls for groups of up to around one hundred members.

All U3As have a website with many adopting the Site Builder software [See website] developed for U3As to create easy to maintain websites; currently around 600 U3As use it. Data collected from these websites which is displayed in Figure 6 shows many of their interest group subjects with the font size denoting popularity.

U3As organise outings, including trips to museums and theatres and visits to country houses and gardens. Many members enjoy walking including Exploring London and its history on foot; on each occasion a different member takes the lead and researches the history of places and people in advance of the walk. There is a practical limit of group size so that all can hear the leader, walk as a group and find suitable stops for lunch; the limit is twelve to sixteen and, as this is a very popular subject, my own U3A has nine such groups who travel on different days to suit their own convenience.

Many U3As organise holidays for their members, sometimes in the UK and sometimes in different European countries. Our most recent holidays were cruises on the Baltic and Adriatic and a visit to the River Mersey to see the Three Queens, Mary 2, Victoria and Elizabeth, sail alongside each other for the One Hundred and Seventy Fifth Anniversary of the Cunard Line. For members' safety and for best practice on insurance we always use fully-bonded professional tour companies to run our holiday groups.

As well as these activities which appeal to members' special interests, we have a monthly meeting with a lecture by an outside speaker; our most prestigious speaker was Black Rod, an official of the British Parliament, who described his army career and his subsequent second career helping manage the security and operations of the Palace of Westminster. I remember the occasion very well because on the due date he had to cancel at the last moment because his services were required by the Prime Minister. He came on a re-arranged day and kept us enthralled with humorous tales of his time in high office.

One of our guiding principles is that we collaborate with neighbouring U3As, both in setting up new U3As and in developing educational opportunities for our members. In Surrey we have been running study days for almost twelve years. We use a concert hall at a local music school that will hold two hundred members and the day consists of in-depth talks on a chosen topic; essentially four one-hour lectures with breaks for tea/coffee/lunch. The very first study day was on the Wild-life and History of Box Hill in Surrey and the most recent was on Majesty & Menace; Henry VIII and the Tudor Age; the over ninety topics over the years have covered art, history, health and climate change and much else besides. The whole programme is available on our website [See Surrey U3A Network website]. The wide-ranging topics and a very pleasant environment attract increasing participation.

In the South East of England [See South East U3A Forum website] we run an annual summer school for four days at Chichester University. Up to two hundred members are resident on the campus and study with a tutor on one of the twelve topics available. Summer schools have been run for about fifteen years and there are usually five or six each year at different university campuses.

The Third Age Trust and the National Office offer support to all 996 U3As. This includes producing a national magazine, Third Age Matters, for all members and a specialist magazine, Sources, which covers different interest group topics in each issue. The Trust has voluntary national subject advisors on fifty topics studied by U3As. The Trust also provides advice, insurance and educational resources for all U3As and much more.

At the national level we have contacts with major institutions such as the Royal Institution (RI), The Royal Society and the National Institute for Medical Research; they all provide afternoons of presentations on various topics with, as an example, talks on Poisons, Psychopathy and New Materials on a past occasion at the RI.

The last development I will mention is what we call Shared Learning Projects (SLP). The idea is that we make contact with a major institution such as the British Museum and find an area of interest where the energies of a group of enthusiasts might be used. The initiative started because museums were being asked to address the educational needs of the whole population, not just the younger generation. At the British Museum one project involved giving feedback on the design of a newly re-

furbished gallery. I led a project at the Imperial War Museum where those involved gave a series of talks to the public standing by the object they had studied; in my case the observation car of a Zeppelin airship. So far we have well over one hundred such projects and the programme continues to grow. A future SLP in the South East will cover the development of Citizenship over the 800 years since Magna Carta.

Eric Midwinter, one of our founders, was commissioned to write a book to celebrate the progress of U3As in 2004 [Midwinter]; it was prompted by the number of U3As reaching five hundred and now we are awaiting the One Thousandth U3A. The role of the U3A Movement is becoming better recognised and in 2012 we were pleased to be asked to take part in an inter-generational debate in the House of Lords, "The Big Care Debate", about where the responsibility for looking after the older generation lies. Is it with the State, the Family or the Voluntary Sector? The debate can be seen on the House of Lords website [See "The Big Care Debate"] and we are pleased to have been invited to take part in another such event on the digital society and politics in 2014.

## 4. REVIEWS OF FORTY YEARS OF THE U3A MOVEMENT

Over the years many reviews of the progress of the U3A Movement and its value to its members have been written and Rick Swindell, based in Brisbane, Australia has been one of the more prolific authors. His reports can be found on the U3A-Online website [See website] which mainly exists to provide on-line courses to U3A members in Australia and many other countries. The 1995 review by Rick Swindell with Jean Thompson, who had just retired as chairman of the Third Age Trust, [Swindell & Thompson] highlighted the difference between France and other countries where the U3A is based in a conventional university and uses its staff and facilities and the UK and Australia where the idea of self--help education was developed and large numbers of U3As based in communities could be created. Over the decades many models for U3A development have been adopted with varying emphasis including those using government or local municipality support such as in China.

In America the provision of lifelong learning is carried out through very many different organisations and examples were described in a paper given at our 2014 conference in Toulouse [Sequin]. One option is Elderhostel which was founded in 1975 and re-named as Road Scholar in 2010 [See Road Scholar website]; it now provides around 100000 not-for-profit educational tours each year. One of their reports [Elderhostel] describes the stimulation and activities sought by the retired population, including "self-actualisation".

To mark the Fortieth Anniversary of the U3A Movement Marvin Formosa of the University of Malta produced a thoughtful account of its progress [Formosa]. He recognises the value of the opportunities offered to members by U3As, but suggested that they need to examine the quality of learning, instruction and curriculum to ensure that they meet the changing needs of the Third Age cohorts who should form their newest recruits. The suggestion that U3As are possibly elitist that he has repeated may not be generally accepted because U3As aim to be open to all. There are undoubted biases on gender, ethnic origin and mental/physical disability but as U3A members are self-selecting and many U3As rely heavily on voluntary effort, in most cases it can be hard to do more than ensure the door is well and truly open. While the gender bias has been investigated in the UK, one should not forget that one of the U3A Movement's strengths is its openness to men and women, and both benefit, and that various forms of social support and acts of friendship take place within U3As as members fall prey to the ravages of time.

A recent AIUTA initiative proposed by Professor Livio Zerbini from Ferrara U3A in Italy was to develop a U3A Charter that would define our broader aims. The charter needed to encompass the different ways of working, across U3As and across countries as well as pointing the way to the future. Figure 7 shows the final document, which has now been translated into numerous languages.

The Third Age Trust is keen to support U3A exchanges and was pleased to hear about the developing link between Surrey U3A Network and Poznan U3A which is now in its third year. When Lidia Wrocinska-Slawska and Henryk Kociemba, Vice Presidents of Poznan U3A, visited Surrey in March 2014 they were able to meet our then national chairman, Barbara Lewis, at a public lecture on the recent discovery of the remains of King Richard III. You may have heard the tale; the king's tomb was lost for over four hundred years after the demolition of the friary where he was buried, but his remains were discovered in 2012 after an inspired archaeological investigation in a car park and were positively identified using DNA evidence.

In September we had an exchange group from Uppsala U3A in Sweden visit Surrey and they joined us at our national conference in Cirencester. It is appropriate then to finish this article with a message from Barbara Lewis that was given to conference attendees. "U3A is an organisation of men and women who regularly gather together to share their experiences, knowledge, philosophies, values and ideas. They learn from each other. It is a forum for the growth of the human spirit, the development of friendships and the exploration of ideas to enrich the quality of life in the Third Age." All the members from Surrey were very pleased to be involved with the exchanges with Poznan U3A and Uppsala U3A. We are hoping to arrange further exchanges with China, Mauritius and Spain.

## 5. CONCLUDING THOUGHTS

All the advantages and opportunities outlined in the U3A Charter are a great benefit to U3A members. We are able to find members who take on committee and interest group leader roles so that more and more members can be recruited and can benefit. Physical, social and mental activity keep us young and we are fortunate to have members who keep in touch with others at times of stress and illness. Long may we all benefit from U3A activity.

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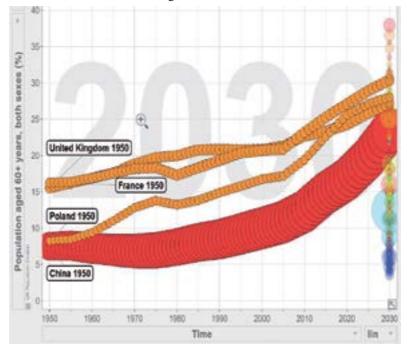
World U3A website, http://www.worldu3a.org/.

## FIGURE 1 HOST COUNTRIES OF AIUTA CONFERENCES

Date of most recent conference with number if > 1Finland 1994 United Kingdom 2012 Germany 1998 China 2013 [2] Canada 2000 [3] Sweden 2013 Switzerland 2002 [2] Brazil 2014 Belgium 2008 [4] Spain 2015 [3] Costa Rica 2010 Poland 2015 [2] Italy 2011 [2] France 2016 [8] Portugal 2012 Japan 2016

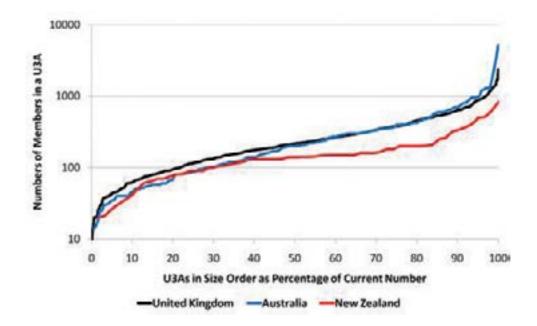
#### FIGURE 2 POTENTIAL TARGET MEMBERSHIP OF U3A MOVEMENT

Percentage of Over Sixties in Population from 1950 to 2030 For China, France, Poland & United Kingdom Data produced with Gapminder World on 24<sup>th</sup> June 2016 Data is available on an age basis rather than on retirement status



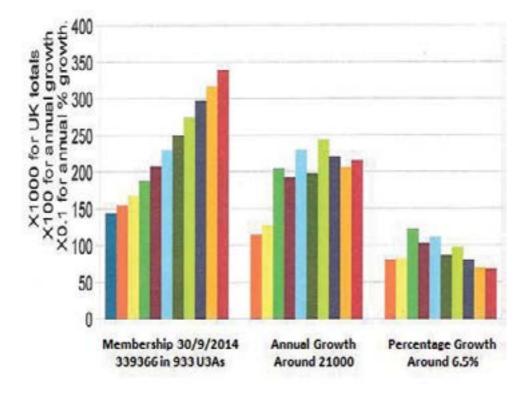
#### FIGURE 3 SIZE DISTRIBUTION OF U3AS IN THREE COUNTRIES

Data was available in 2010 for UK, Australia & New Zealand Sizes range from around 30 members to 3000 members Similar except New Zealand has fewer large towns & large U3As

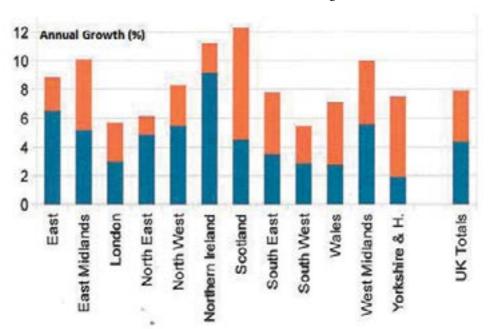




Annual growth rates of more than 6% are maintained







Blue from New U3As & Pink from Existing U3As

#### FIGURE 6 GROUP NAME TAG CLOUD BASED ON 400+ U3A WEBSITES

Showing relative popularity of Interest Group subjects by size

ambing antiques archaectogy architecture art badminton bird watching book bowling bowls bridge categraphy cattastia card making chess cher cinema computing Craft entrage exerce current affairs cycing dancing discussion erams drawing film flower arranging french games garden genealogy geology german got history italian jazz weep to instrumer knitting latin literature london lunch mah jong music opera out painting patchwork peranque philosophy photography pates poetry psychology quitting quiz reading recorder rummitub science Scrabble sewing shakespeare singing social spanish strotting tai chi tennis theatre travel ukudele visits Walking wine appreciation Writing yoge

#### FIGURE 7

ASSOCIATION INTERNATIONALE DES UNIVERSITES DU TROISIEME AGE INTERNATIONAL ASSOCIATION OF UNIVERSITIES OF THE THIRD AGE

ASSOCIACION INTERNACIONAL DE LAS UNIVERSIDADES DE LA TERCERA EDAD

INTERNATIONALE VEREINGUNG DER SENIOREN UNIVERSITÄTEN ASSOCIAZIONE INTERNAZIONALE DELLE UNIVERSITA DELLA TERZA ETA

#### The U3A Charter

1. Objective – The objective of U3As is to impart knowledge and culture in an academic and social context.

2. Mission – U3As focus on the cultural and social advancement of seniors and on their wellbeing.

3. Public – U3As are accessible to all seniors irrespective of age, qualifications or means.

**4. Status** – Many U3As guarantee the academic status of their activities by integrating or linking them with higher education establishments, while other U3As have independent educational status.

5. Education – U3As offer courses, conferences and workshops covering the range of academic subjects taught at universities plus many other topics of local interest.

6. Health – U3As aim to promote the health of seniors by innovative forms of social, intellectual and physical activities.

7. Culture – U3As provide seniors with the tools for a better understanding of our changing society.

**8.** Ethics – U3As focus on reducing all forms of discrimination particularly linked to age, sex, ethnicity and religion and actively campaign against exclusion.

**9.** International – U3As are vehicles for international academic cooperation between seniors in different parts of the world, including the encouragement of visits and reciprocal exchanges.

**10.** Future – U3As contribute to lengthening life expectancy by providing the intellectual and physical conditions for active ageing.

As agreed by the AIUTA Governing Board Meeting in Toulouse.

June 2014

## ROZWÓJ UNIWERSYTETÓW TRZECIEGO WIEKU I ŚWIADCZENIA NA RZECZ ICH UCZESTNIKÓW

#### Streszczenie

Tekst omawia pokrótce historię i rozwój kształcenia ustawicznego w Europie, jak również powołanie przez profesora Pierre'a Vellasa ruchu U3A (uniwersytetów trzeciego wieku). Od czasu powstania ruchu U3A w Wielkiej Brytanii w 1982 roku, nastąpił jego znaczący rozwój. Z roku na rok ruch ten stale się rozwijał, by w 2016 roku celebrować powstanie tysiąca uniwersytetów. W artykule przedyskutowany zostanie zakres możliwości oferowanych uczestnikom uniwersytetów trzeciego wieku oraz korzyści płynące z uczestnictwa, gdzie liczba słuchaczy przekroczyła już 360 000. Fundusz powołał Międzynarodowy Komitet promujący internacjonalny charakter ruchu U3A, współpracujący z Międzynarodowym Stowarzyszeniem Uniwersytetów Trzeciego Wieku (AIUTA) i innymi organizacjami, takimi jak Sojusz Azji i Pacyfiku, w celu wspierania jego rozwoju, i zachęca do wymian, wizyt szkoleniowych, kontaktów partnerskich oraz powiązań na tle językowym między poszczególnymi uniwersytetami trzeciego wieku, a także do uczestnictwa w międzynarodowych wydarzeniach.

Słowa kluczowe: ruch U3A; kształcenie ustawiczne; nauka samopomocy; wzajemna pomoc; statut U3A; starzenie się; populacja; korzyści; grupy interesu; przyjaźń i wymiana międzynarodowa.

#### THE DEVELOPMENT OF U3As & BENEFITS TO MEMBERS

#### Summary

The history and development of Lifelong Learning in Europe will be covered briefly together with the founding of the U3A Movement by Professor Pierre Vellas. The development of the U3A Movement in the United Kingdom has been a notable success since its founding in 1982. It has grown steadily every year and will celebrate its One-Thousandth U3A in 2016. The range of opportunities offered to members and the benefits accruing to the whole membership which already exceeds 360000 will be discussed. The Trust has an International Committee which promotes knowledge of the international nature of the U3A Movement, works with AIUTA and other bodies such as the Asia Pacific Alliance, to support its development, and encourages exchanges, study tours, twinning and foreign language links between U3As and attendance at international events.

Key words: U3A Movement; Lifelong Learning; Self-help Learning; Mutual Aid; U3A Charter; Ageing; Population; Benefits; Interest Groups; Friendship & International Exchanges.