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# Inclusive Adult Learning and Education in India and Germany: On the Intersectionality of Class and Caste with Disability<sup>4</sup>

**Abstract:** This conceptual paper tackles the subject of inclusive adult learning and education, comparing the cases of India and Germany. Whereas the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD) provides a policy framework for the overdue implementation of an ‘inclusive education system and lifelong learning’ (UNCRPD 2006, Art. 24), the global lack of comparable statistical data on adults with disabilities and the realities of being marginalised in, or even excluded from, the community of lifelong learners continue (e.g. UNESCO, 2019; WHO, 2007). The current comparative analysis follows landmark theoretical works on intersectionality (Crenshaw, 1989) and ableism (Campbell, 2009) and draws upon the categories of class (Candeias, 2021; Goldberg, 2018) for the German case and caste (Kothari et al., 2020; Yengde, 2022) for the Indian case and their intersectional impacts on disability and lifelong learning, discussing empowering and oppressive effects on adult learners.

**Keywords:** inclusive adult education, India, Germany, caste, class

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<sup>4</sup> This work was supported by the ERASMUS+ Blended Intensive Programme (BIP), Grant No. 2022-1-DE01-KA131-HED-000057161-1 and the Human Dynamics Centre (HDC) of the Faculty of Human Sciences of the Julius-Maximilians-Universität Würzburg.

## Introduction

This conceptual paper tackles the issue of inclusive adult learning and education, comparing the cases of two nation-states separated by a vast geographical distance: India and Germany. The point of departure for this analysis was the following observation: Despite the legally binding instrument and policy framework that the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD) provides to its States Parties for establishing minimum standards for and claiming the overdue implementation of an ‘inclusive education system and lifelong learning’ (UNCRPD, 2006, Article 24), the global lack of comparable statistical data on adults with disabilities and the realities of being marginalised in, or even excluded from, the community of lifelong learners still continue to a striking degree (e.g. UNESCO, 2019; WHO, 2007). This underlines the gap in transferring policy into action and into lifelong learning realities, as well as the gap in the existing body of research and knowledge on the issue. The present paper is intended to contribute to minimising this research-related gap.

To accomplish this, we employed methodological approaches from qualitative comparative education research that sought to understand educational phenomena within the framework of an interpretive and ideographic design (Fairbrother, 2016; Manzon, 2016). As elaborated in earlier works (Schreiber-Barsch & Rule, 2021; Schreiber-Barsch et al., 2023), these approaches recognise the importance of contextualising and locating such phenomena historically, socio-politically, geographically and temporally; indeed, generalisation is not their primary aim.

In the sense of comparing places (Manzon, 2016), as a country-to-country-comparison that follows the problem approach elucidated by Bereday (1964), we identified *disability in adulthood* as the *tertium comparationis* of our comparative enquiry. This meta-point of reference set the comparative basis for our unit of analysis (*policy agendas for adult education and disability*) and guided our analytical efforts not only to describe but also to capture, understand and explain the commonalities and differences identified by the comparative endeavour. Moreover, with our focus established on the societal macro-level of policy agendas, we were aligned with methodological considerations of comparative and global policy studies on adult education, following works by Milana (2018) and Lima et al. (2016). According to Milana’s differentiation of such studies into distinct patterns, the enquiry dealt with in our study contributes to the aim of shifting ‘attention to widespread political beliefs and cultural hegemonic principles surrounding policy developments in adult education’ (2018, p. 435) in order

to provide counter-evidence to political beliefs, such as those incorporated into agendas of *education for all* or *inclusive adult learning and education*. This methodological approach, therefore, ties in with Mason's (2016) argument that 'comparative education is best conceptualised as a critical social science, incorporating an emancipatory interest focused on the distribution of power and its associated attributes' (p. 253). The purpose of comparative education research is, thus, in Mason's opinion, to 'identify the axes along which educational and other goods are differentially distributed, and to disaggregate their object of study along those axes' (Mason, 2016, p. 253).

Accordingly, we draw upon landmark theoretical works on intersectionality (Crenshaw, 1989) and ableism (Campbell, 2009) and, in particular, upon the categories of class (Candeias, 2021; Goldberg, 2018), for the German case, and caste (Kothari et al., 2020; Yengde, 2022), for the Indian case, and their intersectional impacts on disability and lifelong learning. Such an intersectional approach is used to show the interconnectedness and far-reaching consequences of the interplay between political agenda setting, on one hand, and its range of impact on multiple and pivotal markers of identity, on the other hand.

We begin by defining the key elements of our understanding of the *tertium comparationis* (*disability in adulthood*), which is our point of departure for comparing commonalities and differences in our unit of analysis (*policy agendas of adult education and disability*); we differentiated the latter, following Lima et al. (2016), into two categories: political-administrative guidelines and disability classification systems. Both categories are considered to have a profound impact on setting the realities of lifelong learning opportunities for adult learners with disabilities in India and Germany. This observation led to discussing the findings with the theoretical perspectives chosen in order to identify intersectional relations, most notably in one country, but also in a country-to-country comparison that informed the concluding remarks on the issue under scrutiny and implications for further considerations regarding a discussion on empowering *and* oppressive effects on adult learners with disabilities.

### **Disability and Adult Learners: A Juxtaposition of the German and Indian Cases**

Before elaborating on the comparative enquiry, we must explain our understanding of the key concepts used that framed the juxtaposition of the German and the Indian cases.

## Defining Key Concepts Used in the Enquiry

The *tertium comparationis* of our enquiry centres on the issue of *disability in adulthood*. In the context of this discussion, *adulthood* refers to persons who are considered adults at the age of 16 and older, as e.g., in the Programme for the International Assessment of Adult Competencies (PIAAC) survey (OECD, 2019). Beyond the temporal criteria of a particular age, adulthood is viewed globally as the beginning of the life period characterised by having completed a first (obligatory) phase of education and by taking on responsibilities related to, for example, child-rearing, family care, employment or continued education. Our understanding of *disability* adheres to the UNCRPD definition that states the following: ‘Persons with disabilities include those who have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others’ (UNCRPD, 2006, Art. 1). This definition seeks to capture the category’s complexity as arising from a dynamic interaction between a person’s health condition (individual impairment) and the contextual factors of activities and participation (WHO, 2001). Accordingly, in this paper, we understand disability as a combination of the social and the cultural/relational/biopsychosocial models of disability.

Three conceptual models are commonly used in defining the understanding of disability (Barnes, 2014). Medical models describe a disability as a feature of the person, directly caused by disease, trauma or other health conditions, which requires medical care provided in the form of individual treatment by professionals. Disability, in this model, calls for medical or other treatment or intervention to ‘correct’ or ‘fix’ the problem with the individual. The social and cultural/relational/biopsychosocial models substantially broaden this view. The social model of disability sees it as a socially created problem and not at all as an attribute of the individual. According to the social model, disability issues demand a political response because the problems are created by an unaccommodating physical environment brought about by attitudes and other features of the social environment. The cultural/relational/biopsychosocial models emphasise the intersections across biological, social, cultural and psychological aspects, as well as attitudes, norms and personal perceptions; they also pay attention to power structures. These latter models are advocated in the field of disability studies (e.g. Goodley, 2017; Waldschmidt, 2017), where a disability is perceived ‘neither as only an individual fate, as in the individualistic-reductionist model of disability, nor as merely an effect of discrimination and exclusion, as in the social model’ (Waldschmidt, 2017, p. 24). Instead, the cultural model recognises ‘impairment,

disability and normality as effects generated by academic knowledge, mass media, and everyday discourses' (p. 24). This understanding is also informed by the theoretical approach of *ableism* (Campbell, 2009), which was one of the theoretical approaches that guided our enquiry (explained in more detail in subsequent paragraph). To sum up, in our view, a disability/impairment is something that can be congenital, acquired (e.g. by accident, through disease, due to age) and/or socially constructed, mirroring the non-arbitrary but widely ranging character of the category under scrutiny.

Against this backdrop, *inclusive* adult learning and education would explicitly not target persons with disabilities (PWDs) exclusively. On the contrary, it is meant to address all (potential) learners on an equal level and, as part of this, in particular, those individuals and/or groups with a high risk of vulnerability in the sense of being marginalised from lifelong learning opportunities, as mirrored in the United Nations Education 2030 Agenda and its Sustainable Development Goal (SDG) 4: 'ensure inclusive and equitable quality education and promote lifelong learning opportunities for all' (UN, 2015, p. 14). However, intersectionality, another theoretical approach that guided our enquiry (as described subsequently), highlights the view that the objective of SDG 4 cannot be seen as a stand-alone goal because the scope of inclusion in education as a whole is much broader and considers the many histories, identities and realities of people while continuously being updated to reflect the current needs and imperatives. Thus, like the 17 UN SDGs, intersectionality emphasises relations among a wide range of possible vulnerability factors (derived from, for example, disability, gender, income, race, age) and is of vital importance in developing multidimensional strategies to enhance access and inclusion. Such strategies targeting inclusive adult learning and education involve key aspects of taking a whole systems approach, such as transforming the whole educational environment, recognising the whole person, prioritising support for adult education professionals and practitioners, nourishing a learning-friendly environment and, finally, featuring respect for value and diversity (Schreiber-Barsch & Rule, 2021, p. 553). This approach does not seek to shift responsibility for realising inclusive adult education to only one of the parties involved or to problematise one party as the burden to overcome or the barrier to remove; nor does it promote the idea that moving towards inclusive adult education might happen beyond the legacies of power structures (Schreiber-Barsch & Rule, 2021, p. 553).

Shifting the focus to the juxtaposition of the two cases in this analysis, Germany and India, we argue, finally, that our units of analysis are appropriately comparable because the *tertium comparationis* (*disability in adulthood*) and the unit of analysis (*policy agendas for adult education and disability*) exist in both

countries. Moreover, both countries have adopted and ratified the relevant United Nations Convention (UNCRPD, 2006). Thus, the same policy document has been launched in both nation-states in the sense of a ‘travelling policy’, introduced via intergovernmental organisations and woven into ‘embedded policy’ (Ozga & Jones, 2006). At the same time, this raises questions about the state of the art in both countries.

### Policy Agendas on Adult Education and Disability

In the 19<sup>th</sup> century, Germany became a pioneer in establishing learning opportunities (albeit segregated) for children and young adults with disabilities (Poore, 2009); this system, however, paved the way for a highly segregated structure to develop pursuant to its classification system for impairments/disabilities. UNESCO’s Salamanca process (from the early 1990s) and ratification of the relevant UN Convention (UNCRPD, 2006) in 2009 by Germany had the distinction of placing inclusive schooling on the political agenda and finally initiating a profound transformation of this highly segregated system.

Two key policy documents were launched in Germany in the aftermath of the UNCRPD. The first, adopted in 2011 (‘Our Way to an Inclusive Society’; German Federal Ministry of Labour and Social Affairs [BMAS], 2011), is grounded in a rights and ethics approach. The second document, adopted in 2016, shifted to a more pragmatic approach in outlining a national action plan (BMAS, 2016a). However, it, too, contains limited references to adult learners so that the issue of inclusion in the sense of disabilities continues to be almost entirely focused on the formal context of schooling and on vocational education and training. In this formal context, the traditionally strong legal autonomy of the 16 German federal states regarding the spheres of education and culture serves as an additional barrier, as the consequence of this context is that sixteen more or less different ‘inclusive education’ systems exist, greatly affecting learners’ mobility and range of choice across a lifespan.

In addition, as part of Germany’s national action plan, a new state law on participation (*Bundesteilhabegesetz*) was passed in 2016 (BMAS, 2016b), aiming to fulfil the UNCRPD agenda and to substantially broaden the participation of PWDs in lifelong learning. Yet, it continues to be the case that courses for PWDs are predominantly provided in sheltered workshops or in care institutions without any primary adult education mandate. That means not in public spaces such as in a public adult education centre, called a *Volkshochschule* (Heimlich & Behr,

2009). Germany's public adult education centres are legitimised by their general accessibility and their public and professional mandate for providing lifelong learning to all adults, dating back to their historical roots at the end of the 19<sup>th</sup> century. At the time of this writing, about 900 centres were operating as independent legal entities under the auspices of the state, the respective federal states and the local authorities. They have been providing continued education, in-house training and vocational certificate programmes, as well as literacy courses and the full range of liberal adult education curricula. Nonetheless, whilst bearing in mind that the database is still rudimentary, the rate of participation of adults with disabilities in their programmes remains very low (Autorengruppe Bildungsberichterstattung, 2014; Koscheck et al., 2013). The sheltered workshops, where, as noted above, most learning opportunities for adults with impairments or disabilities are provided (along with care institutions), also serve as the predominant place of employment for adult PWDs (BMAS, 2016a, pp. 119–124, 196, 222). This particularly holds true for persons labelled with an intellectual disability, who constitute 75% of the sheltered workshops' employees (Bundesarbeitsgemeinschaft Werkstätten für behinderte Menschen [BAG WfbM], 2020, p. 37). Sheltered workshops integrate persons with disabilities into the labour market and enable their participation in work; at the same time, they can be influential gatekeepers, as it is up to them to decide who is perceived as abled enough to transition to vocational training or (sheltered) jobs in the primary labour market. Furthermore, working in a sheltered workshop is not considered regular employment. Hence, these employment opportunities are decoupled from legal protections, such as those related to minimum wages or pension funds (BMAS, 2016a, pp. 163–164). Thus, despite new legislation, the sheltered workshops remain a highly segregated place for working and learning for adults with disabilities. Not surprisingly, the German Institute for Human Rights published a harshly critical conclusion in its July 2023 monitoring report on the UNCRPD's translation into practice (German Institute for Human Rights, July 2023):

“The Monitoring Mechanism has observed with concern a misguided rhetoric of inclusion, in which different political and social stakeholders refer to segregated structures as part of an inclusive system. Duplicate structures are maintained unchanged across the board (Article 24: requirements for an inclusive school system; Article 27: vocational training, employment in sheltered workshops; Article 19: deinstitutionalisation). The Committee's 2015 recommendations on dismantling segregated systems step by step have at best been taken up hesitantly, and at worst negated.” (p. 6)

India's recently launched National Education Policy, or NEP (Ministry of Education, 2020a), promises to bring revolutionary changes through equitable and inclusive education and, in fact, has received praise for intending to provide all students in the nation with unrestricted access to education primarily because, as declared by the administration, the NEP dispels darkness and ushers in a new era of inclusivity in the educational system. The goals of the new Indian educational system support the aim of creating *Atmanirbhar Bharat*, or 'Self Reliant India', by 2030 (SDG 4). In India, inclusive education has typically been achieved at the expense of excluding children with impairments. Children with disabilities frequently face a higher barrier to education; in fact, their disabilities exacerbate their access to education. As evidence, barely 50% of people with disabilities in India are literate (Ministry of Statistics and Programme Implementation [MOSPI], 2016). As further confirmation, only 62.5% of persons with impairments aged between 3 and 35 have attended school (MOSPI, 2016). Thus, the policy includes various measures to guarantee the way towards a more inclusive education.

Chapter 21 of NEP 2020 (para. 4) states the following with explicit reference to adult learners: "Strong and innovative government initiatives for adult education – in particular, to facilitate community involvement and the smooth and beneficial integration of technology – will be effected as soon as possible to expedite this all-important aim of achieving 100% literacy" (Ministry of Education, 2020a, para. 21.4). As a result, the nation must achieve a 100% literacy rate and end illiteracy. To reach the goal of 100% literacy, the NEP focuses on adult literacy and calls for inclusive education.

The issue of education for PWDs is also included in Chapter 3 of India's Rights of Persons with Disabilities (RPWD) Act (Ministry of Social Justice and Empowerment, 2016). In addition to outlining concrete steps to follow to support and facilitate inclusive education, this chapter emphasises the roles and responsibilities of educational institutions. Section 18 of the Act also discusses adult education. The goal of this directive is to encourage, safeguard and ensure that PWDs participate in adult education and continuing education programmes on an equal footing with other adults.

Finally, the Indian government's *Sarva Shiksha Abhiyan* (SSA) initiative, which aims to provide elementary education for all 6–14-year-old children, including those with disabilities, addresses the issue of inclusive education. The Integrated Education for Disabled Children (IEDC) Scheme offers free education to 15–18-year-old children who fall under its purview (Ministry of Social Justice and Empowerment, 2006).

The New India Literacy Programme (NILP) 2022–27 document (Ministry of Education, 2022) envisions replacing 'Adult Education' with 'Education for All'



due to the need for contextual changes and because the phrase 'Adult Education' was not appropriately used to include all illiterates aged 15 years and above. The term 'Adult Education' suggests a concentration on adults, seniors and older people. Hence, the term 'Adult Education' is expected to change to 'Education for All' in the NILP 2022–27 document to make education more inclusive.

However, criticisms have been voiced. According to those appraisals, the NEP missed the chance to include 'disability education' in the curriculum for all students, allowing for the inclusion of disability as one of the many facets of identity, which would have carried out the UNCRPD's vision for the human rights model in letter and spirit. This issue is crucial for creating an inclusive Indian society and eradicating the persistent stigma and stereotypes regarding disabilities. Although the policy has placed a focus on problems like the need for gender sensitisation, the inclusion of disability education in the curriculum might have enhanced inclusive education.

Overall, the diversity that exists in India and the needs of its diverse population require comprehensive changes and flexibility in the education system to facilitate the implementation of policies and achievement of the nation's ambitious and transformative education agenda. A multidisciplinary approach across the macro and meso levels of inclusive education is required to tackle this challenge and to initiate a transformation at the micro level of lifelong learning for all learners as well.

### National Classification System Used for Disabilities

What is considered a disability or impairment differs worldwide (WHO, 2007, pp. 17–24), which not only creates a key challenge for conducting a comparative enquiry but also argues for enhancing the existing body of relevant evidence. The International Classification of Functioning, Disability and Health, or ICF (WHO, 2001), perceives disability as a dynamic interaction between a person's health condition and contextual factors (p. 4). The example of the intellectual disability (ID) subcomponent showcases the challenge: the UNCRPD and the ICF have argued against using an IQ score to classify an ID. However, in many national disability classification systems, including in Germany and India, the IQ score has been considered a necessary measure for grading the level of a person's intellectual functioning, even though its classification ends up in substantially different terminologies and conceptualisations (WHO, 2007, p. 17). For example, the equivalent term for ID (*geistige Behinderung*) has been used in Germany for persons assigned an IQ score of 55 and below since 1973 (Neuhäuser &

Steinhausen, 2013, p. 18). A score of 70 or below indicates an ID internationally, including in the United States and India, thus incorporating persons who would be diagnosed with a 'learning disability' according to Germany's standards. This example emphasises again the extent to which features that define a disability depend on national, global and/or cultural interpretations.

In Germany, in 2019, 7.9 million or 9.5% of the total population were officially recognised as having a severe disability (DESTATIS, 2021, p. 327); this number included only those who were classified officially and who were assigned a disability grade of at least 50%. Overall, the data are not clear-cut or up to date. For example, 2013 data identified a total of 299,000 persons in Germany as having an ID (assigned to persons with an IQ of 55 and below) *or* a learning disability (BMAS, 2016c, p. 46), without distinguishing between these two types. In contrast to other impairment types, the majority of people in this category (59%) were significantly younger, under 45 years old (p. 47). The German government relies on the UNCRPD in defining disability (BMAS, 2016b, Art. 2), complementing it by referring to temporal criteria: a disability/impairment in that sense is characterised, firstly, by being present for more than six months and, secondly, a condition of body and/or mind that substantially differs from the condition typical for that chronological age. Moreover, following the logic of the ICF, the act of distinguishing between different types of disabilities only exists in relation to functioning as a barrier impeding a person's participation in society. This might be an intellectual, corporal and/or mental health-related feature and must receive an officially recognised minimum disability grade of 20% to entitle access to social state benefits.

In India, a person with a benchmark disability includes a person with a grade no lower than 40% (again, highlighting the different framing mechanisms of the category from a juxtapositional view) for a specified disability as authorised by the certifying authority. The basis for assigning a disability has not yet been defined properly and people with disabilities always encounter bias. This discrimination is further exacerbated when it is compounded by caste and gender as additional factors ('cumulative discrimination'). Only a person certified as having a benchmark disability can reap the benefits of policies and schemes approved by the government of India, as well as the affirmative action guidelines prescribed at various levels of education, employment or other services.

India's RPWD Act enacted on 28 December 2016 (Ministry of Social Justice and Empowerment, 2016) defines disability based on a more evolving and dynamic concept to enhance the consonance of globally used definitions. The Act seems more inclusive as it increases the number of disability types from 7 to

21 to be added in the new amended act of 2016. The Act covers the following specific types of disabilities:

1. Physical disabilities, which include locomotor disabilities, visual impairments, hearing impairments and speech and language disabilities.
2. Intellectual disabilities, which encompass specific learning disabilities and the autism spectrum disorder.
3. Mental behaviour, referred to as mental illness, not defined specifically.
4. Disabilities caused by chronic neurological conditions and blood disorders.
5. Multiple disabilities, which are left open for interpretation and taking a more holistic approach.

The Government of India has enacted three pieces of legislation to protect the rights of the disabled population (Ministry of Social Justice and Empowerment, 2006).

1. Persons with Disabilities (Equal Opportunities, Protection of Rights and Full Participation) Act, 1995, which provides for education, employment, creation of barrier-free environment, social security and so on.
2. National Trust for Welfare of Persons with Autism, Cerebral Palsy, Mental Retardation and Multiple Disability Act of 1999, which provides for legal guardianship for the four categories and creating an enabling environment to support as much independent living as possible.
3. Rehabilitation Council of India Act, 1992, which deals with developing human resources for providing rehabilitation services.

These legal doctrines and policies address the empowerment of PWDs and seek justice for them, reflecting the idea of equity over equality.

### **Discussing Intersectional Relations: Disability and Class/Caste**

The juxtapositions of the issues of disability and adult learners in the cases of Germany and India provide the framework for discussing this contested terrain in more depth. Depth is added to the discussion by drawing on theoretical considerations from works on ableism and intersectionality and linking them to ongoing discussions on the impacts of societal categories of class (Germany) and caste (India) on the situation of adult learners with disabilities.

*Theoretical Considerations from Works  
on Ableism and Intersectionality*

Classification systems deriving from a nation-state's social scheme and welfare logic architecture play a decisive role in the pedagogical practices of assessing and labelling a learner's abilities, the expected learning outcomes of those abilities and the respective classification of the individual disability/impairment in the context of these learning and educational processes. Campbell's (2009) landmark work on the concept of *ableism* pointed to the most influential impact of what she called the *able/not-able divide* pervading society across all its spheres, resulting in power-driven dynamics of an ability regime. Campbell defined ableism as 'a network of beliefs, processes and practices that produces a particular kind of self and body (the corporeal standard) that is projected as the perfect, species-typical and therefore essential and fully human' (Campbell, 2009, p. 5). Thus, Campbell's criticism was directed against the one-sided and often invisible social architecture of such an ability regime, in which skills and competencies are believed to determine a person's degree of functionality and society's esteem and legitimate, for example, a deficit-oriented segregation of learners according to the socially constructed definitions of who is perceived as able and not-able. This logic of an ability regime aligns in several ways with the medical model of understanding disability, not the least of which is placing complete responsibility for smoothly adapting to the ability regime's standards on the person him/herself with disability, provoking criticism from disability studies scholars. Emerging as an academic discipline in the 1980s, the disability studies make use of interdisciplinary and intersectional approaches to explore disability and impairment issues and their interdependence with social, political, cultural, economic and power-driven factors, featuring the social and cultural/relational/biopsychosocial models of understanding disability noted previously.

In recent decades, increased attention has been paid to the latter models of disability rather than to the medical model, which underpins the fundamental need to understand the main theories on disability and their concerns related to the subject matter. Additionally, more emphasis has been placed on moving towards a normative, legal, sociocultural and, consequently, on the architecture of an inclusive society due to the models' respect for and understanding of inherent cultural, historical and social perspectives and interdependencies. Such an architecture governs the impact and the framework for how learning programmes or educational/learning organisations are driven and how they influence the way services are provided and the type of interventions that

are implemented under the auspices of learning and disabilities. This influence not only encompasses the critical analysis of the disability vis-à-vis cultural, historical, medical, economic, social and political phenomena, but also of the disability as being rights- and justice-based. The disability issue does not provide momentum for optional welfare or a normative ideology (Minich, 2017) for its own sake, but points to the gap created by a socioeconomic and political lack of will to support the living situations and learning realities of persons with an impairment or disability.

Following these theoretical strands, the approach of intersectionality emphasises once more the relevance and the high impact of analyses that do not elaborate in an isolated manner on categories such as age, gender or disability but, instead, explore their mutual interferences and mutual aggravations in influencing the living situations and learning opportunities of individuals and collectives by experiencing discrimination, vulnerability, marginalisation and/or exclusion. The term ‘intersectionality’ was coined by Crenshaw in her article, ‘Demarginalising the Intersection of Race and Sex’ (1989), in which she emphasises the multidimensionality of a Black woman’s experience in society and the discrimination that heightens throughout that society. Both theoretical backgrounds, ableism and intersectionality, have been used to further investigate the issue of disability with respect to class and caste due to the relevance given to acknowledging the multi-categorical and mutually reinforcing nature of an ability regime’s impact on learning and education.

### *Intersections: Disability and Class*

Like the epistemological foundations and the power-driven narratives of a caste system (see the next chapter), in Germany, the debate and realities pertaining to ‘doing class’, and respectively, ‘doing underclass’ (Chassé, 2016) as dominant features of modern society are elaborated in academia and experienced by individuals and collectives in their daily contexts of living and learning. As Kothari et al. (2020) clarified about the intersection of disability and caste (chapters 1–2), a cultural studies approach of ‘doing class’ (Chassé, 2016) spotlights the situation- and context-related range of social interactions and social practices in which individuals, collectives, institutions and nation-states continually (re)produce their social realities and architectures for living together due to a specific set of norms, values, beliefs and, accordingly, understandings of identity markers as features of difference and diversity (Chassé, 2016, p. 38). This perspective aligns with the cultural model used to understand disability because it refuses to (re)

produce class as a person's feature and responsibility (medical model) but brings attention to the social processes of (re)producing a pursuant social status with its far-reaching consequences, also for learning and education. The full extent of the relevance of class, however, derives from the distinguishing characteristic of a wage-dependency status (Candeias, 2021, p. 11), thus, aligning with the tradition of critical theory, pointing as well to the power-driven dynamics of the dominant societal order. These dynamics can be traced not only by analysing Germany's social realities, but also by considering the European nation-states, as underlined by Goldberg's (2018) work. The common features of the trans-European underclass must be recognised as indicators of a high risk of vulnerability towards crises and economic conjunctures and their positioning on the lower steps of social hierarchy (Goldberg, 2018, p. 64), parallel to missing access to a comparable amount of cultural capital and possible investments in learning and education background (p. 67).

Thus, we align with bell hooks' position that 'class matters' (2020), in particular, as it mirrors the complex interdependencies and the intersectionality of identity markers, such as disability and class. As outlined previously, the first and foremost *social* status associated with being labelled, in whatever sense, as impaired or disabled can have severe effects on access to education, ending predominantly up in low levels of school-leaving qualifications (KMK, 2020, pp. XXI–XXII) and, accordingly, in marginalised routes and vulnerable positions on the labour market due to the respective social security scheme (such as the non-existence of a minimum wage) or level of remuneration and pension. Not surprisingly, the relation that a disability, particularly an ID, has with low incomes, precarious and fragile employment possibilities and low levels of educational backgrounds is more than evident, clearly highlighting the reinforcing dynamic of being labelled as a specific kind of wage-earner in the ability regime.

Comparable to the dynamics at work at the intersection of disability and caste, the influential power of the category of class on the living and learning realities of PWDs is derived from the social consensus in an ability regime on their abilities for learning, as Edgerton emphasised back in 1967 (p. 207): 'no other stigma is as basic as mental retardation in the sense that a person so labelled is thought to be so completely lacking in basic competence'. It is also derived from the lack of material (e.g. wage levels) and immaterial (sheltered workshops as a stigmatised place of work) appreciation for their share in the labour market and, similar to the narrative of the medical model, from charging the individuals themselves with responsibility for smoothly adapting to the system at hand without questioning its underlying logics and narratives.

*Intersections: Disability and Caste*

The intersectionality of disability and other identity markers, like race and/or ethnicity, has been given significant focus globally thus far; however, the identity marker 'caste' from the Indian context has not become part of such comparative axes (see e.g. Kothari et al., 2020; Yengde, 2022). This is the case, despite how the failure to incorporate the marker can impact a massive segment of the planet's human population in the form of India's circa 1.4 billion inhabitants and its expected population growth, which will soon result in India replacing China as the world's most populous nation-state.

The Indian context of caste vis-à-vis the global context of race, ethnicity, gender and/or religion can be drawn in parallel terms regarding multiple axes of discrimination, inequalities and injustices. However, the issue of caste on the global level has not been given much attention because, as Yengde (2022) argues, elites from local caste systems have captured power globally as well and can suppress discussions on the caste-based issue on a global platform, after which the elites 'utilize academic canons and political debates to undermine caste-sensitive interpretations of history' (pp. 344–345). In this sense, according to Yengde, global caste 'is a form of localized slavery that exists across the world' (p. 344). Yet, due to the migration of Indians, an emancipation of caste-based discrimination has been observed on a global level. The following aspects are seen to define global caste:

"enduring stigma, humiliation, striving for recognition as human, fear of pollution from the out-castes, strict endogamy, minority status, spiritual assent, bloodline through inheritance, control of the body politic as an accessible labour to be disposed, judicial and police officials ... in favour of caste supremacy, and denying access to basic material and non-material resources through the state and laws." (p. 345)

The Indian state officially abolished the caste system, called *jati*, in the 1950s; nevertheless, this category continues to be a highly influential and commonly used marker of identity, widening what had been narrowing ranges of opportunities in life and for learning. No all-Indian or clearly defined system of castes and their ranking exists due to a hierarchal status issue; overall, more than 3,000 castes (*jatis*) and even more sub-castes are known to currently exist. This caste system had been originally established due to the category of religion, meaning the Hindu religion, which was divided into the four main groups of *Brahmins*, *Kshatriyas*, *Vaishyas* and *Shudras* and a fifth group called 'the untouchables'

– the *Dalits*. Presently, identification with a specific group, regardless of religion, continues, which has become part of political affirmative action measures, aiming at empowering the most marginalised and vulnerable groups and ensuring their participation in decision-making processes and areas of the nation-state. Accordingly, Article 16 of the Indian Constitution, enacted in 1949, seeks to ensure ‘equality of opportunity in matters of public employment’ and states the following (para. 2): ‘No citizen shall, on grounds only of religion, race, caste, sex, descent, place of birth, residence or any of them, be ineligible for, or discriminated against in respect of, any employment or office under the State’ (Government of India, 1950, art. 16). Under the same political will, the government officially established the following castes – the SC (Schedule Caste or Dalit), ST (Schedule Tribe) and OBC (Other Backward Class) – in order to place emphasis on and better their situation and participation in society by reserving places in government positions, higher education and the legislature for them. These named castes are known to belong to the lowest stratum of the Indian castes and, thus, of Indian society and are among the groups deemed most socioeconomically disadvantaged and marginalised in India. However, in contrast to this political will, Kothari et al. (2020) recently emphasised the following:

“[Among] the total disabled population in India, Schedule Caste (‘SC’) persons with disabilities were 49,27,433 and Schedule Tribe (‘ST’) persons with disabilities are 21,40,763 according to recent data from 2018. Despite this, the existing legislations and welfare schemes for persons with disabilities have no provisions for SC, ST and other backward castes (‘OBC’) persons with disabilities.” (Chapter 1)

In this sense, the medical model for understanding disability is mirrored in the epistemological framework of the caste system according to the Hindu idea of *Karma* (Kothari et al., 2020, Chapter 2).

A glance at the higher education sector also showcases the intersectionality of the identity markers of disability and caste; in this sense, being from a lower caste in itself becomes a disability and serves as a barrier to accessing needed resources for learning and education, while the two markers mutually reinforce their impact on learning and living opportunities. As Table 1 shows, PWDs in the higher education sector experience an accumulation of belonging from the lower strata and face two tiers of discrimination with respect to their caste basis and disability; their participation is still minor but has been increasing in recent years. At the same time, an inclusive (adult) education has been in high demand



as many people drop out of mainstream higher education because of the intersection of disability and caste barriers.

**Table 1.** Persons with Disabilities (PWDs) enrolled in Higher Education and their Caste Distribution

Year	Total PWD Enrolment	% of PWD-SC out of Total PWD Enrolment	% of PWD-ST out of Total PWD Enrolment	% of PWD-OBC out of Total PWD Enrolment
2011–12	65552 (0.02%)	8.1	2.1	26.1
2012–13	54119	12	4.4	31.2
2013–14	51954	8.8	2.5	26.4
2014–15	64298	10.3	2.4	32.6
2015–16	74435	10.9	2.5	32.6
2016–17	70967	11.1	2.5	30.7
2017–18	74317	9.4	2.9	28.4
2018–19	85877 (0.2%)	9.3	3.4	31.5
2019–20	92831 (0.24%)	9.4	3.4	31.6
2020–21	Data yet to be published			

*Source:* Ministry of Education, 2020b. All India Survey of Higher Education (AISHE). PWD = Persons with Disabilities; SC = Scheduled Caste; ST = Schedule Tribe; OBC = Other Backward Caste.

Moreover, subordination varies, as Dalits or the tribes from the lower strata of society are based on a dichotomy of purity and pollution (see also Yengde, 2022). Hence, the form of discrimination also varies, according to what occupations are practised by the SC/ST members of the community. Manual scavenging is practiced, especially by the Dalits (SCs) population. According to the Ministry of Social Justice and Empowerment (2021), more than 95% percent of the total manual scavengers, 43,797 persons, belong to the SCs.

The disparity in society in India is obviously not the product of a singular, homogeneous form of oppression. The discriminatory systems that existed before the NEP was drafted must be revisited in order to comprehend any of the topics of debate outlined herein. Thus, the reality is intersectionality, not homogeneity. Accordingly, the lives and experiences of people, who have many identities and come from various backgrounds, should be considered when developing policies and respective measures as analysing one dimension on a single axis in order to make policy decisions under the leitmotif of equality and ‘education for all’ would be useless. The capability approach brought forward by Amartya Sen (1984) highlights the freedom of achieving the requisite individual values. It is a

moral framework that requires a social arrangement where all must be provided equal resources to promote their individual capacities and to make them universally functionable. The approach allows for the analytic differentiation that some might be capable but need more resources, whereas others may have resources but need to learn how to apply them, which aligns with the relevance of an intersectional approach. The same applies to the different forms of disabilities (21 types, RPWD Act, Ministry of Social Justice and Empowerment, 2016). Different types of disabilities require a different number of resources for PWDs to make them function universally.

In the last few decades, the interdependency of the caste system with education and its importance, together with employment options, in easing socioeconomic challenges and escaping historical shackles began to be recognised, as illustrated in the discussion on policy agendas. Lack of explicit inclusionary measures would naturally result in an exclusionary approach to the educational system in the context of India, where the history of discrimination is long. Such a policy includes the creation of 'special education zones' as one of its goals. As a result, areas of the nation with sizable populations from socially, economically and educationally disadvantaged groups will be designated special education zones, where all programmes and policies will be implemented to the fullest through additional concerted efforts to transform their educational environment. Disability studies have now started to inculcate the caste itself. However, caste-based studies focus only on caste-based discrimination, wherefore a gap emerged. The adult education policies, like the New India Literacy Programme for 2022 to 2027 (Ministry of Education, 2022) and the 2020 National Education Policy (Ministry of Education, 2020a), have focused on adult literacy and lifelong learning; however, the only subject that receives focus is disability, but it has not been interlocked with the caste category. This demands a proper hauling of the system, as well as the implementational authority to be more inclusive with respect to caste and disability.

## Conclusion

In conclusion, we confirm the urgent need for contributing to lowering the existing research gap in transnational, comparative work on the issue of our *tertium comparationis*, disability in adulthood, and its impacts and realities for adult learning and education in nation-states such as Germany and India. In this sense, the paper contributes to shifting a critical gaze on, what Milana (2018) had put forward, 'widespread political beliefs and cultural hegemonic principles

surrounding policy developments' (p. 435). The comparative enquiry illustrated the powerful dynamics of the intersection of disability with other identity markers, such as class and caste, and its far-reaching consequences for the precarious, restricted lifelong learning realities of (young) adults in both countries under scrutiny. In this sense, class and caste might be traced back in different academic and societal traditions of a particular nation-state. However, the consequences of these identity markers in, argued from the theoretical approaches of cultural studies, on-going processes of *doing class* and respectively *doing caste* are highly similar in positioning a substantial amount of adult lifelong learners at the far end of the peripheries of the discussed ability regimes as part of the global capitalism order, and, accordingly, of lifelong learning opportunities.

Against this backdrop, we argue that there is a need to further discuss the uniform strategy of policy agendas that seem to ignore intersectional effects and dynamics in raising oppressive barriers to learning and education even higher for those who live in most vulnerable contexts and situations. This includes, on the level of policy agendas, the need for comprehensive strategies in inclusive (adult) learning and education, spelling out the agenda up to, for example, an inclusive curriculum and inclusive learning infrastructures at education institutions. In our view, this gives rise to a particular need and attention to negotiating the often lofty objectives of policy agendas with the aim of sharing and integrating the everyday experiences and voices of those learners seen as the target group of such agendas in these processes and in these agendas. This starts with basic tasks: The most expressive way to illustrate society's incoherent concept of disability is through the usage of various terms like "inclusion", "integration", "children/adults with special needs", and "differently-abled", which continues in the vague guidelines and blind spots of classification systems that have far-reaching consequences for the particular learners. Furthermore, the issue of financial resources in moving towards an inclusive society is at stake: In India, for example, a philanthropic private model of education is also introduced as part of the National Education Policy's revamp of quality-based higher education. The implementation of disability reservations in government institutions and institutions receiving government assistance is constantly under debate, but the entry of private players into higher education would have a significant impact on the inclusion of people with disabilities in higher education. Therefore, the government and other authorities should place more emphasis on budgetary allocations for disability education, improving working conditions for teachers and special educators, removing attitudes and stereotypes regarding disability and taking steps to integrate more people with disabilities into mainstream society in order to create an inclusive and equitable society. Only then, in our view, will there be a chance

to move towards the objectives of a diverse and egalitarian society, also beyond lofty policy agendas.

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## Inkluzivno učenje i obrazovanje odraslih u Indiji i Nemačkoj: o interseksionalnosti klase i kaste sa invaliditetom<sup>8</sup>

**Apstrakt:** U ovom radu se bavimo inkluzivnim učenjem i obrazovanjem odraslih i poređimo slučajeve Indije i Nemačke. Premda je u Konvenciji Ujedinjenih nacija o pravima osoba sa invaliditetom (UNCRPD) propisan okvir politike za sprovođenje „inkluzivnog obrazovnog sistema i celoživotnog učenja“ (UNCRPD 2006, član 24), koje je trebalo odavno uvesti, na globalnom nivou i dalje ne postoje uporedivi statistički podaci o odraslima sa invaliditetom i realnostima njihove marginalizacije, pa čak i isključenosti iz zajednice celoživotnih učenika (npr. WHO, 2007; UNESCO, 2019). U ovoj komparativnoj analizi sledimo vodeće teorijske radove o interseksionalnosti (Crenshaw, 1989) i ejblizmu (Campbell, 2009) i oslanjamo se na kategorije klase (Goldberg, 2018; Candéias, 2021) kada je reč o slučaju Nemačke i na kategorije kaste (Kothari et al., 2020; Yengde, 2022) kada je reč o slučaju Indije i njihove interseksionalne efekte na invalidnost i celoživotno učenje te diskutujemo o posledicama koje osnažuju i opterećuju odrasle učenike.

**Ključne reči:** inkluzivno obrazovanje odraslih, Indija, Nemačka, kasta, klasa

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<sup>8</sup> Ovaj rad su podržali ERASMUS+ Blended Intensive Program (BIP), Grant No. 2022-1-DE01-KA131-HED-000057161-1, i Human Dynamics Center (HDC) Fakulteta humanističkih nauka Univerziteta Julius-Maximilians u Virzburgu.