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Scaling Inequalities?

Some Steps towards the Social Inequality Analysis in Migration Research beyond the Framework of the Nation State

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I Introduction

Taking current debates on migration and social inequality (Bayer et al. 2008, Tränhardt and Bommes 2010) as a starting point, this article addresses the appropriate conceptual ways to study migration and social inequality beyond the exclusive framework of the immigration state. It concentrates on the conceptual tools providing a chance to theorize the causal inter-relationship between migration and social inequality by avoiding the master narrative of methodological nationalism (Wimmer and Glick Schiller 2003). In particular, the article refers to the innovative scale approach (Brenner 2004, Swyngedouw 1997).

The narratives of migration and social inequality are easily combined within both the scientific and non-scientific discourses. In particular, national media debates relating to immigration and social inequality focus either on political arrangements to attract the highly skilled migrants or to push the integration of low skilled migrants into the 'receiving society' (Geißler and Pöttker 2009, King and Wood 2001). Integration, assimilation and access to education are often defined as master processes preventing unprivileged positioning of migrants in the class hierarchy of the receiving country.

In a similar way, the dominant social sciences' discourses on migration mainly address the subject of migrants' class mobility within the receiving context. They particularly focus on the complex interrelations between the ethnic and class divisions encouraging economic and political inequality (Gordon 1964, Devine and Waters 2004, McAll 1992). However, advocates of transnational approach to migration have increasingly questioned this dominant position (Bayer et al. 2008, Berger and Weiß 2009). Building on an observation that social practices of migrants are increasingly characterized by the pluri-local way of living, they pay attention to the migrants' positioning within the two national stratification systems. Even more,

they argue that social practices of transnational migrants create alternative, non-national stratification orders (Kelly and Lusis 2006, Pries 2008a).

The goal of this article is not only to compare these theoretic positions within migration research. Instead, it intends to reflect, to what extent both positions are components of a broader theoretic continuum. This is why, it aims to analyze, how migration theories design the causal relationship between migration and social inequality on the national, global, and transnational socio-spatial level. In doing so, it takes the perspective of a scale approach.

Emerging within social geography, the current version of a scale approach (Brenner 2004; Jonas 2006) is characterized by the relational understanding of spatiality, which presupposes duality of spatiality: a spatiality can be created as both as territorial fixities, as well as geographic mobilities. Adopting the scale approach to social sciences Ulrich Beck (Beck and Sznaider 2006), for instance, argues that the nation state is not the exclusive framework to analyze social reality. His proposal is to research social phenomena on four socio-spatial dimensions or scales, such as the national, the transnational, the global and the local, *simultaneously.*

To put it in other words, Beck insists that societal order is increasingly characterized by a complex socio-spatial differentiation. The process of globalization, based on the power of modern communication and geographic mobility of people, goods, artefacts and ideas, preconditions the transformation, but not the disappearance of spatiality. Consequently, Beck questions the assumption of mutual exclusiveness of globalization and spatial differentiation. Instead, he examines the emergence of new spatial differentiations as a result of a worldwide globalization.

Thus, the scale approach has a capacity to enrich the research on migration and social inequality. To be more precise, it initiates to research the inequality and migration nexus on different socio-spatial scales simultaneously in order to better understand the complexity of social inequality. Hence, the article starts with a short introduction of the scale approach (II).

Subsequently, it reviews three dominant ways by which migration theories outline the relationship between social inequality and migration. First, it introduces migration theories focusing on inequality positions of migrants and their descendants within the nation state settings (III). Second, it indicates migration approaches analyzing social inequality within the global socio-spatial frame (IV). Third, it reviews migration concepts focusing on transformation of migrants' social positions on the transnational scale (V).

Reviewing the three positions, I address the question of how do different theories conceptualize the relationship between migration and social inequality. I also pay attention to questions of how do they analyze the social inequality formation and in which manner do they address socio-spatiality.

The resulting conclusion discloses the potential and limits of simultaneous inequality analysis of migration and social inequality on different socio-spatial scales. Furthermore, it goes beyond the classic migration and inequality debates and considers multi-directional quality of international mobility, multi-faceted meanings of socio-spatiality, as well as multi-dimensional understanding of social inequality.

II The Logic of Scale: The Scale Approach as a Useful Methodological Innovation for Migration Research?

Social scientists define methodological nationalism as a line of argument, which equalizes the institutional framework of a nation state, as well as its territorial surface, with the social unit of society (Wimmer and Glick Schiller 2003, Beck and Sznaider 2006). The relevant question is why is it problematic to follow the so-called methodological nationalism within the research on migration and social inequality?

First, migration researchers working within the conceptual framework of methodological nationalism define geographic mobility of individuals and groups as a one-directional process of resettlement, which finishes after the relocation. Consequently, the co-constitution of migra-

tion and social inequality is exclusively analyzed within the framework of an immigration state. This way of research does not consider that some migration flows are characterized by a multi-directional, circular and unfinished quality (Pries 2008a, 2008b).

Second, this kind of inequality research centres on the transformation of the migrants' class position, as well as on the ethnic stratification within the 'immigration society'. Therefore, migration is implicitly seen as a determinant of social inequality within the 'receiving society'. These studies overlook the fact that many migrants and their descendants move between stratification orders of both the emigration and immigration countries. This is partially true for some non-migrants (Goldring 1998, Parreñas 1991).

Third, concepts following the methodological nationalism describe ethnicity as an objective category to explore an ethnic stratification that is closely related to social inequality. This is why, the mutual interconnection between 'class' and 'ethnicity' or 'class', 'ethnicity' and 'gender' is hardly considered in such inequality studies. To conclude, the 'methodologically nationalist' theories describe the process of migration, as well as social inequality, mainly in static and one-dimensional terms.

The scale approach (Beck and Sznaider 2006, Brenner 2004) provides an appropriate conceptual tool to overcome the national lens and to go deeper into the complexity of the interplay between migration and social inequality. Indicating social reality as structured along different socio-spatial scales, such as global, local, national and transnational levels, it pinpoints the four core arguments:

(1) The socio-spatial scales are not fixed. Though they structure and organize social practices, they, at the same time, are socially produced and dynamic entities (Brenner 2004, Löw 2008). To put it in different words, socio-spatial scales are based on the interconnection between material artefacts and social practices. They shape, but they are also shaped by social reality. The dynamic quality of socio-spatial scales is grasped by the term 'scaling'.

(2) The scale approach pinpoints the coexistence of various socio-spatialities (Schroer 2008). It states that actors constitute spatiality by reference to different space models: an absolutist, which equalizes the spatial and the social entities, and a relational, which avoids such an equation. From the relational perspective, socio-spatiality includes dispersed locations, coproduced by networks, mobilities and technologies: the relational space is not to imagine without its content. While social actors (individual, collectives, organizations and states) on the national and global level refer to the absolutist understanding of spatiality, actors on transnational and (under special circumstances) local levels use relational models of spatiality. This duality of spatial construction produces socio-spatiality as both spatial fixities and geographic mobilities (Jonas 2006). However, the correspondence between the different scales is relational. This view provides a chance to conceptualize the coexistence of alternative relations between social inequality and migration on different socio-spatial levels.

(3) Different socio-spatial scales are not located hierarchically to each other (Brenner 2004). The social phenomena on the global scale are not based on the sum of social events on the national or the local socio-spatial levels. On the contrary, the advocates of scale theory indicate the dialectical relationship and mutual co-constitution of social events on different socio-spatial scales.

(4) Finally, the scales do not coincide with the abstraction levels of the social order, such as macro, meso, and micro level of abstraction. The dichotomy global/local should not be reduced to the dichotomy of macro/micro etc. There is an occasional relation between scales and levels of abstraction, which can be identified in detail only on an empirical ground.

To give an example, migration is identified as one of the central conditions for social inequality by migration studies following the framework of methodological nationalism, i.e., on the national scale (Gordon 1964). Albeit, concepts preferring the global socio-spatial framework as a point of reference define social inequality as resulting either from the global wage-level differences between countries (Borjas 1989, 1990) or from the expansion of the capitalist

market (Portes and Walton 1981). Transnational approaches, on the contrary, indicate international migration as a process to reduce or, at least, to revaluate social inequality in both the sending and receiving countries (Kelly and Lusis 2006). Finally, the migration studies focusing on the local level of cities or neighbourhoods primarily pinpoint the reduction of social inequality through migration (Glick Schiller and Çağlar 2009, Salzbrunn 2008). In sum, the scale approach does not agree upon the relevance of these different theories and views. Instead, it identifies them as a result of a socio-spatial differentiation. Moreover, it raises a question of how inequalities on different socio-spatial levels interplay.

Using the scale approach as a heuristic device, as a methodology, the research receives a chance to pose new theoretic and empiric questions. First, this approach sheds light on the relation between migration, inequality and spatiality, which hitherto find little attention. Second, it discloses inequality dynamics, which are territorialized and 'fixed' on some socio-spatial scales, but at the same time, de-territorialized and fluid on the others. Third, it takes a closer look at the global and transnational processes without neglecting the power or the meaning of nation states.

Following the scale concept as a methodological device the article reviews migration theories, which address a) the national, b) the global and c) the transnational socio-spatial frame of reference. The interplay between social inequality and migration on the local scale (Glick Schiller and Çağlar 2009, Salzbrunn 2008) is beyond the scope of this article. In particular, the article pays attention to the two interconnected subjects. First, it pinpoints how different theories address (or not address) socio-spatiality in respect to migration and social inequality. Second, it sheds light on ways migration theories conceptualize the mutual determination of social inequality and migration. In the conclusion, it suggests ways to overcome static approaches to spatiality, migration and social inequality.

III Migration and Social Inequalities on the National Scale: Class and Ethnic Differences as Central Determinants of Social Inequality within the Immigration Country

Using the scale approach to better understand the complex relation between migration and social inequality, I open the analysis by discussing the migration theories primarily referring to the framework of an immigration state. In particular, I compare arguments of the classic assimilation theory (Gordon 1964), as well as of the segmented assimilation approach (Portes and Rumbaut 2006, Zhou 1997). In doing so, I pay a special attention to how they interrelate the dynamics of assimilation, class stratification and ethnic belonging.

Gordon's inequality analysis is strongly related to his study of migrants' assimilation into the US-American society. In sum, he defines the minorities' cultural and structural (i.e., labour market and political participation) assimilation into the white protestant anglo-saxonian middle class 'core subsociety' as the most preferable assimilation path. However, Gordon makes an observation that only some minorities of European protestant background are able to be structurally included into the institutions of this 'dominant subgroup of subsociety'. He states that despite of most migrants' acculturation into the 'anglo-confirm' US-American culture the structural assimilation into the institutional fields fails. Thus, the imperfect assimilation is rooted in the basic structure of the US-American society, which is internally divided in the so-called 'ethclasses'. Therefore, ethclasses are understood as social classes, which are internally separated across ethnic, religious and racial belonging.

To be more precise, the ethclasses approach includes two main arguments. First, referring to Barber (1957), Gordon defines social classes as 'hierarchical arrangements of persons in a society based on differences in economic power, political power, or social status.' (Gordon 1964: 40). He additionally equalizes one of these variables, the social status, with the class position. At the same time, class units are characterized by specific subcultures, which refer to the respected 'social heritage' or to a 'way of life' of a group or a population (Gordon 1964: 33).

Second, Gordon stresses that additional social divisions produced by racial, ethnic and religious differences characterize class stratification. Using a partly essentialist understanding of ethnicity, he defined an 'ethnic group' as 'any group which is defined or set off by race, religion, or national origin, or some combination of these categories.' (Gordon 1964: 27) The imagination of the common history and future is the main source, which creates the 'sense of people hood', 'ethnic culture' or 'ethnic identity (Gordon 1964: 29).

In sum, Gordon emphasizes that the social reproduction of the 'subunits' of the US-American society, emerges from the intersection of ethnic belonging of minorities or majorities with class boundaries. On the one hand, every social class is internally divided in ethnic subunits. On the other, ethnic groups are internally separated in different class layers. Developing this idea Gordon formulates three central statements. To begin with, he insists that class boundaries are more powerful than ethnic boundaries; this is why 'people of the same social class tend to act alike and to have the same values even if they have different ethnic backgrounds' (Gordon 1964: 52). In addition, 'primary' close community relationships, in which individuals are socialised, are framed by the boundaries of their class belonging *and* by the boundaries of their ethnic belonging. People, who are 'of the same ethnic group and social class' constitute the 'ethclass'. In spite of that, members of the ethclass simultaneously share various kinds of self-identifications: 'historical identification', which creates ethnic belonging and, 'participational identification', which produces class-oriented 'behavioural similarities':

> 'With a person of the same social class but of a different ethnic group, one shares behavioural similarities but not a sense of peoplehood. With those of the same ethnic group but of a different social class, one shares a sense of peoplehood but not behavioural similarities. The only group which meets both of these criteria are people of the same ethnic group *and* same social class.' (Gordon 1964: 53)

As a contrast to Gordon's approach, the theory of segmented assimilation questions normative notions on migrants' assimilation. Using the research on the 'second generation' of 'new immigrants' from Asia, Latin America and Caribbean into the United States, Portes and Rumbaut (2006), as well as Portes and Zhou (2005) suggest that migrants' assimilation paths are strongly connected to their class mobility in the country of immigration. The central question of segmented assimilation approach is therefore: '[I]nto what sector of American society a particular group assimilates?' (Portes and Zhou 2005: 90) The idea of class stratification and the concept of ethnicity as a cultural resource build conceptual tools to analyze three possible assimilation outcomes.

The first assimilation path is equal to traditionally highlighted *upward assimilation* of migrants into the middle class of the 'core society'. The upward mobility of migrants is encouraged by their assimilation into the 'culture' of a white middle class, as well as their professional mobility in the destination country (Portes and Zhou 2005: 90).

The second path sets *downward assimilation* of migrants into the domestic underclass. This path is assumed as probable, if immigrants tend to emphasize their ethnic belonging and share the same neighbourhood areas with already subordinated domestic minorities. Moreover, migrants' rejection to assimilate into the dominant culture increases the probability of migrants' adaptation into the marginalized position. Consequently, the emphasis of ethnic belonging and assimilation into the underclass culture encourages the downward class mobility of the immigrant offspring.

Portes and Zhou single out three factors additionally favouring the downward assimilation: 1) the geographic location in outsider neighbourhood areas, 2) the prejudices in respect to the skin colour of immigrants, and 3) 'the absence of mobility ladders' rooted in economic restructuring of US-American economy after Fordism (Portes and Zhou 2005: 91).

Finally, the third trajectory – the so-called selective assimilation – is characterized by migrants' maintenance of ethnic belonging. However, ethnic resources are used in a way that

enables the successful class mobility. Portes and Zhou stress that '[i]mmigrants who join well-established and diversified ethnic groups have access from the start to a range of moral and material resources well beyond those available through official assistance programs' (Portes and Zhou 2005: 92). Using the example of Punjabi Sikh–youth in California they show that well-organized ethnic communities provide additional educational possibilities for immigrant youth and facilitate children's educational success. Moreover, 'diversified' ethnic communities offer additional employment opportunities for both newcomers and the so-called second generation. They also create additional opportunities for social mobility. To conclude, the selective assimilation' into the US-American 'core society' enables both a successful social mobility and a manifest perpetuation of ethnic belonging.

To sum up, Portes and Rumbaut (2006), as well as Portes and Zhou (2005) move away from a normative expectation of a single assimilation outcome. They concisely summarize conditions favouring or constraining various assimilation paths, such as 1) a governmental policy of the host society, 2) a societal reception, which could include 'values and prejudices of the receiving society' (Portes and Zhou 2005: 90) and 3) central qualities of a co-ethnic community. They elaborate on complex transformation of ethnic belonging during the assimilation process, which under specific conditions may promote both upward and downward class mobility.

Both the classical and the segmented assimilation approaches understand social inequality as an outcome of the migration process, whereby an unprivileged position of migrant' populations in immigration societies is indicated as a result of 'downward' assimilation. Both approaches, however, include some weaker points, which need to be raised.

First, referring to class stratification, researchers identify migrants' social mobility as dynamic, while mobility paths of the non-mobile population, the so-called 'core group' is designed as static. Second, analytical connections between ethnic- and class-belonging have several problematic connotations. In particular, both approaches do not include theoretic

specifications about mechanisms conditioning specific intersection between the class- and ethnic-belonging. Third, both approaches develop their arguments by referring to the container model of a nation state. Consequently, migrants' social contacts to their home countries, but also migrants' possible transnational networks are not considered in the analysis of the migrants' social mobility.

In particular, the last point is truly important from the analytical perspective of the scale approach.

Assuming the territorial space of a nation state as a pre-given container, both approaches define migration as a one-way process stressing its exceptional quality. Though migration processes are complex, socially produced dynamics, which have impacts on both spatialities and social inequalities, they rather see international migration as an external process (emerging from the outside of a society), which determines social inequality within the country (i.e., society) of immigration. Social inequality (class and ethnic stratifications) are produced only within the nation-state frame, whereby the impact of spatiality (both territorialized and fluid/de-territorialized) itself on social inequality and on migration is hidden.

Consequently, assimilation theories pay less attention to how nationally produced social inequality intersect with global or transnational inequalities. Some assimilation literature pinpoints, however that nationally determined forms of social inequality mirror in inequality dynamics on the local level encouraging spatial segregation between migrants and non-migrants in the city neighbourhood areas (Alba and Nee 2003).

IV Migration and Inequalities on the Global Scale: Universal Mechanisms of Inequality Formation?

Why do migration approaches focusing on the global scale do not regard the social inequality dynamics on the national level? Why do they not consider the problems of 'failed' or selective assimilation? One of the reasons is their focus on economic transformation of nation states'

economies through migration. Besides of that, they pay attention to those, labour or highly skilled migrants, who are already included in the labour market of the destination country.

The two most prominent theories addressing social inequality and migration within the global framework are the neoclassical approach to migration (Todaro 1969) and the world systems theory (Portes and Walton 1981, Sassen 1991, Wallerstein 1974), which suggests different views on how international migration shapes the global social inequality and *vice versa*.

The neoclassical approach to migration, popular within the migration research in the 60s and 70s, analyses inequality and migration on two analytical levels. While the micro level oriented studies focus on individuals' positions within the economic production process (Chiswick and Hatton 2000), the research centring on the macro level addresses the economic disparities between different nation states (Levis 1954, Todaro 1969).

The neoclassical micro level analyses focus on migration decisions and draw a picture of migrants as economic beings, who compare employment chances in different target countries and finalize the decision by calculating costs and benefits. Consequently, individuals tend to invest in migration, as they tend to invest in educational assets (Chiswick and Hatton 2000, Borjas 1990).

The macro level research conceptualizes labour migration as a result of economic inequality between the sending and the receiving countries. From the neoclassical point of view labour migration is a result of labour oversupply in the low-income countries and the increase of labour demand in the high-income countries: 'Countries with a large endowment of labour relative to capital have a low equilibrium market wage, while countries with a limited endowment of labour relative to capital are characterized by a high market wage, as depicted' (Massey at al. 1993: 433). However, labour migration rather reduces than increases economic inequalities between the migration sending and receiving countries. In particular, the mechanism of 'factor price equalization' (Borjas 1989, 1990) organizes the exchange of capital and migration in opposed directions. While labour migration tends to be attracted by the

labour-rare receiving countries, capital is usually invited by the capital-rare sending countries: 'As a result of this movement, the supply of labour decreases and wages rise in the capital poor country, while the supply of labour increases and wages fall in the capital-rich country, leading, at equilibrium' (Massey et. al., 1993: 433). In sum, labour migration functions as a force on the long turn reducing the economic disparities between countries.

Although, the 'factor price equalization' model does not consider the importance of remittances within a migration process (Taylor 1999), some neoclassical development studies emphasize their crucial role in stabilizing an emigration country currency on the macro-level (Papademetriou 1985, Penninx 1982). In a similar way, on the micro-level remittances are expected to improve the life conditions of individuals and income standard of households in a sending country. Some development studies also indicate the balancing effect of migration of the highly skilled on the sending countries' economies. High skilled migrants are expected to return and to behave as a carrier of a relevant professional knowledge and technological innovations in the sending countries' economies (Beijer 1970).

To sum up, the neo-classical approach conceptualizes a codetermining relation between inequality and migration: On the one hand, international migration is described as a result of economic disparities between high income and low income countries. On the other, as outlined on examples of 'factor price equalization', labour migration, remittances and highly skilled migration, migration is a source to minimize economic inequality between the sending and the receiving countries.

Opposite to the neoclassical approach, the research based on world systems theory questions the inequality reducing effect of international migration. It designs an interconnection between the international migration and social inequality as mutual escalation. Focusing on the global expansion of world economy it pays attention to positions of individuals and collectives within the dynamic of industrial production considering their access to the means of production.

In sum, the world systems approach explores global economic inequality gaps by reference to international division of labour between the core, the peripheral and the semi-peripheral countries. From this point of view, international migration is embedded in the 'unequal terms of trade', which determine economic and political dependency of migrants sending peripheral world regions on migrant receiving core world regions. Referring to the dependency theory (Frank 1969), the world systems approach is mainly interested in the mechanisms of global inequality formation determining the 'development of underdevelopment' within the peripheral regions. It classifies international migration as a 'natural outgrowth of disruptions and dislocation that are intrinsic to the process of capitalist accumulation' (de Haas 2007: 15). To be more precise, on the one hand international migration is defined as a result of the already existing international division of labour. On the other, it leads to intensification of global disparities.

Building on Marxist notions the world systems proponents critically analyze the migration of both low-skilled labour and high-skilled migrants. First, labour migration conditions the so-called 'brawn drain' and 'lost labour effect' within the sending areas (Penninx 1982). The exodus of young male and female populations negatively affects local production, especially agri-cultural sectors. Second, in the context of the 'brain drain' debate some studies indicate a selective quality of labour migration. They argue that there are generally wealthy middle-class populations, who migrate (Lipton 1980, Zachariah at al 2001). The decision of the better-educated people to migrate creates lack of specialists for successful independent development of peripheral countries (Baldwin 1970). In addition, studies pinpoint the negative impact of migrants' remittances on reinforcing global inequalities criticizing a high dependency of sending countries' economies on remittances flows (Rubenstein 1992). According to this view 'migration was seen as having ruined traditional peasant societies by undermining their economies and uprooting their populations' (de Haas 2007: 5).

Summarizing weaker points of both approaches I, first, pinpoint their reduction of social inequality to economic inequality. Second, implicitly using the essentialist understanding of spa-

tiality both research schools do hardly consider the internal heterogeneities and inequalities within the nation states assuming that sending countries are usually economically disadvantaged and receiving countries are economically prosperous[1]. Third, both approaches have an ambivalent understanding of international migration. Especially, the world systems approach conceptualizes international migration as more or less, one-way processes with static outcomes. The international migration is only organized in one direction—to the centre. Similarly, the neoclassical approach though admitting a possibility of return migration does not conceptualize international migration as bi- or multi-directional flow, which could consider the simultaneous exchange of migrant populations between the sending and the receiving countries.

Following the scale approach, the aim of my analysis is not just to summarise the conceptual relationship between the migration and social inequality, but to show, how the absolutist understanding of spatiality leads to a corresponding definition of social inequality.

(1) Modelling the global stratification of nation states both the neo-classic and the world systems approaches strongly relate to an absolutist view on spatiality representing the global space 'as a pre-given territorial container', within which social inequalities emerge. This is in particular, in Wallenstein's approach: "space appears to be frozen into a single geometric crystallization – 'one economy, multiple states'" (Brenner 2004: 52). Consequently, migration, described as one-directional flow of people, takes place on the static territorial surface. The socially constructed quality of the 'world container' and nation states, as 'sub containers' remain hidden. The static quality of national container-space is analogically applied to the global space. The idea of class stratification, therefore, is transferred to the global frame of reference as economic stratification: Social inequality appears not as inequality between class strata, but between strata of nation states.

(2) However, opposite to assimilation approaches, migration is not defined as the external force anymore. It is the result, but also the transformer of the global social inequality. This is reason why migration cannot be described as a process that creates alternative, non-national inequalities. Consequently, historical production and transformation of spatiality through migration is widely neglected.

(3) In addition, both approaches define nation states as the central units of analysis *within* the global container. Consequently, the inequality configuration on the global scale is described as determining the social inequality (in the sense of nation states' economic development) on the national scale. Some studies (Sassen 1991) consider the local level of world economy by analyzing the world cities. Taking the central position, within the hierarchy of cities that, cities provide organizational structuring of global capitalist economy. However, even here, the local city scale is designed as determined by the global capitalist power hierarchies.

IV The Transnational Scale: Does Transnational Migration Produce New Social Inequalities?

Opposite to previously described approaches, new theories on transnational migration (Faist 2000, Levitt and Glick Schiller 2004, Vertovec 1999) presuppose a bi-directional quality of migration flows. They reject to view migration as uni-directional resettlement of people, from the sending to the receiving country. Instead, they take a closer look at social practices of individuals and collectives organized across multiple socio-spatial points of reference. Consequently, they pay more attention to simultaneous transformation of migrants' unequal social positions in both sending and receiving countries.

This approach, however, is not a consistent set of theories, but a divergent volume of concepts proposing an alternative frame of reference in inequality analysis. Focusing on circular, return and more-time migration, it neither constrains inequality analysis to geographic and institutional boundaries of nation states, nor to a global arena. Instead, geographical places,

which are territorially spread, and, at first sight, not connected to each other, create the spatial context for inequality formation (Pries 2008b). Social inequality is primarily addressed in terms of class stratification.

Conventionally transnational approach implicitly includes elements of two prominent migration theories. First, it relates to the migration systems theory (Fawcett 1989), which pays attention to the specific political and economical linkages *between* the migration sending and migration receiving countries. Moreover, migration systems approach identifies ways, by which these historically specific connections continuously channel international migration. Second, transnational migration research makes use of the cumulative causation approach (Massey 1990) suggesting social capital and migration networks as decisive mechanisms, which stimulate and regulate international migration.

The redefinition of the nation state's role within the process of inequality formation is the main implication resulting from the transnational approach. It rejects both to consider the immigration state as a single (institutional and geographical) framework for inequality formation, and to define the nation state as a single addressee of inequality claims. Instead, it suggests looking more closely at the role of migration, welfare, but also gender regimes of the sending and receiving states for social inequality formation (Morawska 2004, Lutz 2002).

To better understand the transnational view on social inequality I will discuss three relevant conceptual positions, which address:

(1) Impacts of transnational linkages on migrants' class position in the country of destination (Morawska 2004),
(2) Migrants' contradictory social mobility resulting from the transnational way of living (Goldring 1998, Parreñas 2001),
(3) The emergence of the transnational habitus (Kelly and Lusis 2006).

(1) The comprehensive empirical study by Eva Morawska (2004) addresses ways by which transnational linkages determine migrants' class position in the United States. Partly following the argument of Portes and Rumbaut (2006), the author equalizes paths of migrants' assimilation with class mobility.

In sum, the study highlights two main results. First, it suggests that the positive sending countries' attitudes towards émigrés, as well as dense familial and symbolic bonds to the sending country on the part of migrants probably lead to two types of upward social mobility: a) to the migrants' upward mobility into the middle class of 'core society' or b) to migrants' inclusion into the 'ethnic' middle classes. In particular, these factors need to intersect with the absence of ethnic/racial discrimination in the country of destination, as well as with migrants advanced acculturation. Also, those migrant groups with transnational linkages experiencing host country racism, who manage to distance oneself from 'host racial minorities', receive chances for upward class mobility.

Second, migrants' familial ties to the home countries encourage the downward class mobility, if they overlap with four social factors: a) with racial discrimination in the host country, b) with the lack of host-country government's assistance, c) with the home country governments solicitation of émigrés' political loyalty, and d) with the lack of required cultural capital such language and occupational skills on the part of migrants.

To sum up, the novelty of Morawska's study is the consideration of a) transnational migrants' linkages, b) sending countries politics and c) migrants biographical past to understand the dynamic of migrants' social mobility in the country of destination. However, there are open questions concerning authors' conceptual definition of social inequality in the context of migration. First, considering transnational factors the author concentrates on migrants' class position in the immigration country, whereby transnational linkages function as the crucial factor influencing it. However, the relevant class position of migrants, which maintain transnational linkages to their sending country, is not considered. Second, the author analyzes

class mobility paths of distinct ethnic groups, such as Indians, Dominicans, Jamaicans, Russian Jews and undocumented Chinese without assuming diverse social mobility of people sharing the same ethnic belonging. Here, social mobility is primarily presented as group destiny. Third, the author reduces social inequality to class inequality, without showing mechanisms of class inequality, ethnic belonging and transnational linkages intersect in the inequality formation.

(2) Raphel Parreñas (2001) and Luin Goldring (1998) suggest an alternative way to address the transnationally relevant inequality formation. Analyzing social inequalities primarily as class inequalities, they pay attention to how the transnational linkages of migrants *simultaneously* influence their class position in both the sending and receiving country. Therefore, they shed light on the phenomenon of a *contradictory social mobility*, which is particularly experienced by skilled migrants, who are belonging to the middle class in the emigration country. Because of different kinds of institutional discrimination, such as limitations of residency and work permits, as well as restricted acknowledgment of their university degrees, these migrants have few chances to achieve adequate professional positions in the destination country. This is why, they are mainly employed in the low wage sector, i.e., the domestic or care services in the destination country (Bauder 2003).

Nevertheless, the financial situation of this 'group' of migrants improves, because their income is higher compared to their previous professional position in the emigration country. Therefore, they receive a higher-class position in the sending country's stratification order. At the same time, due to their professional engagement on the low wage (often, informal) labour market in the immigration country they are located at a lower-class position in the receiving country's stratification order.

Researching social positioning of Phillipino migrants engaged as domestic workers in Rome Rachel Parreñas identifies the contradictory social mobility as the following:

> 'Migrant Phillipino domestic workers define their sense of self and the place in the global labour market from the contentious subject-position of contradictory class mobility. This contentious location refers to their simultaneous experience of upward and downward mobility in migration. More specifically, it refers to their decline in social status and increase in financial status' (Parreñas 2001: 150).

In sum, the discovery of contradictory social mobility points to the fact that transnational migrants situate themselves simultaneously within stratification orders of both the sending and receiving countries. The inconsistency of their social position is rooted in the fact that class distinctions are addressed towards groups of reference in multiple countries. However, further research needs to clarify some open questions. First, is the approach a helpful tool to analyse the social location of migrants, in which the position relates to the same (middle class) level of social stratification in both the sending and the receiving countries? Second, it remains open, in which way contradictory is the social mobility interconnected with complex self- and outside-ethnicisation.

(3) The transnational habitus approach (Kelly and Lusis 2006) takes a more radical perspective suggesting a constitution of the transnational frame of reference for inequality formation. Building on the case study on social location practices of Phillipino migrants living in Canada (Vancouver area), the authors address ways in which transnational migration transform valuation standards of different capital forms of migrants and non-migrants, such as an economic, cultural and social capital. Using Pierre Bourdieu's habitus approach to explore how the pluri-local way of living changes cultural drafts of capital valuation Philip Kelly and Tom Lusis (2006) suggest the concept of a transnational habitus.

Some authors criticize a common application of the habitus approach within the traditional migration research (Nee and Sanders 2001), which assumes a simple transfer of migrants' cultural, economical and social capital to a new social 'space'. Further, migration studies usually assume that capital forms are valued by habiti 'located' within the immigration state. In opposite, Kelly and Lusis (2006) argue that the processes of valuation, accumulation and conversion of capital forms 'continues through transnational social fields well after settlement

has occurred' (Kelly and Lusis 2006: 237). This is why, 'the habitus itself [becomes](...) transnationalized' (Kelly and Lusis 2006: 837).

Providing evidence to transnational habitus, the authors present a detailed analysis of (de-) valuations of economic, cultural and social capitals in-between the two, the Canadian and the Philippine contexts. They, first, shed light on multiple valuation of migrants' economic capital. Phillipino migrants' position is usually located in the low-waged health and care sectors of the Canadian labour market, because of institutional devaluation of the sending country's educational degrees. However, by sending remittances back home the migrants become able to transfer economic to cultural capital, because remittances are often spent for migrants' children and siblings' education in the sending country.

Analyzing the evaluation of migrants' social capital Kelly and Lusis indicate both distant contacts to relatives and friends in the Philippines, as well as local contacts to co-migrants in Vancouver as highly valued. In addition, non-migrants in Philippines positively rate contacts to migrated compatriots. This valuation of social capital is highly influential for carrier, education and training decisions of non-migrants in Philippines. Moreover, it channels the newly arrived Phillipino migrants into a specific low paid niche of labour market.

Elaborating on cultural capital Kelly and Lusis analyze ways, by which it is simultaneously converted to alternative capital forms in both the sending and receiving country. Institutional cultural capital such as education has qualified Phillipino migrants for immigration to Canada, but it is seldom institutionally recognized after resettlement. This is why, it can hardly be converted into the economic capital in the country of destination.

In a similar way, the valuation of the embodied cultural capital, which includes fluent English and familiarity with Northern American cultural norms, is ambivalent. On the one hand, embodied cultural capital allows the speedy access to (low-waged positions of) the labour market in Canada. On the other, it 'creates a sense of distinction from them left behind' in the Philippines (Kelly and Lusis 2006: 843). In addition, 'going abroad' itself is evaluated in the

Philippines as a form of cultural capital, which is expressed and celebrated during the festivities organized by migrants throughout their visits to the sending localities.

In sum, Kelly and Lusis (2006) indicate that migrants' self-positioning in both the sending and receiving countries' stratification orders creates a transnational habitus, which is not a sum of two different forms, but an alternative cultural scheme allowing to translate and convert various forms of capital into each other: "For most immigrants 'being here', 'sending back', and 'sending for' are all forms of transnational connection that circulate, enhance and convert forms of (…) capital" (Kelly and Lusis 2006: 836).

However, the study leaves two open questions. First, the prominent focus on Phillipino migrants in Canada and their counterparts in Philippines is not sufficient to address the interaction between migrants and non-migrants (as well as other minorities) in the country of immigration. Therefore, the question of how transnational habitus creates a distinctive power by confronting the non-transnational habitus remains open. Second, transnational habitus can hardly be understood as a homogeneous one. A relevant question is about the criteria needed to organize research on a variety of transnational habiti.

To conclude, both the contradictory social mobility approach and the transnational habitus approach build on the relational understanding of spatiality. They consider the bi-directional quality of migration and suggest analyzing spatiality as produced by migration (and not in the opposite way as the theories usually suggest). They analytically separate the inequality formation from a static 'container' of the nation state or of the globe. This tactic enables to analyze the formation of social inequalities not within the pre-given, fluid and relational spatialities, which are based on geographic mobility. Only this strategy provides a chance to design the non-national stratification orders.

For instance, the transnational habitus approach, hints at the idea of transnational stratification not as a static, but as ambivalent and dynamic. This stratification order emerges within the spatial frame of reference between the locations in Philippines and Canada, and it is

formed by the transnational migration. This approach considers the simultaneous (re-)valuation of forms of capital (economic, cultural and social) in both the sending and receiving countries that interrelates *within* the pluri-local social order, which is created by geographic mobility. In doing so, it hints at the complex, partly contradictive interplay between the national and transnational stratifications. In sum, the new spatiality forms, such as transnational geographies, appear as the frame of reference for non-national stratification orders. Therefore, transnational migration is described as an independent variable determining the emergence of alternative, non-national, social inequalities.

VI Challenges of Scale Approach to Research Social Inequalities

The review of various approaches provides evidence on how theories conceptually design the mutual constitution between international migration and social inequality on the three socio-spatial scales[2].

First, on the national scale researchers pay the most attention to social mobility of migrants, to their incorporation into the stratification order of a receiving society. The migrants' unprivileged positions are produced either by failed, incomplete assimilation or by migrants' assimilation into the underclass of the 'host' society. This research is bounded to the spatial boundaries of an immigration state.

Second, researchers identify the dialectical relation between international migration and social inequality on the global scale. Both the neoclassical and world systems approaches indicate gaps in countries' economic development as the central determinant stimulating international migration, whereby the frame of reference is an absolutist geographical 'container' of the globe. However, while the first theory stresses the potential of international migration to reduce social inequalities, the second approach qualifies international migration as the mov-

ing force to increase global social disparities. Both approaches reduce social inequality to economic inequality and implicitly deduce migrants' positions from the economic positions of 'their' sending countries.

Third, addressing social inequality and migration on the transnational scale, researchers indicate the changing conditions for the formation of social inequality. Here, the study of Ewa Morawska shows how transnational linkages of migrants influence their class position in the 'receiving' society. Moreover, Goldring (1998) and Parreñas (2001) highlight the relational quality of migrants' social position using the term 'contradictory social mobility'. In addition, referring to Pierre Bourdieu's habitus approach Kelly and Lusis (2006) hint at transformation of the meaning patterns to evaluate social inequality. They stress that economic, cultural and social capital are valued in an alternative way, if migrants make use of a transnational habitus.

However, the theoretic review does not attempt to suggest a transcendent viewpoint on the interplay between inequality and migration. Instead, taking the perspective of the scale approach, the conceptual analysis in previous sections suggests the two main implications.

The first implication pinpoints the need to include the spatial approaches into the inequality research. Outlining the relational, based on geographic mobility, and the absolutist, based on territorial fixities, understanding of spatiality as a decisive factor for respective inequality analysis, I suggest considering the specific logics of inequality formation on various socio-spatial scales. To be more precise, we win more theoretical clarity, if we pay more attention to how theories define socio-spatial arrangements as determining (or not determining) the specific inequality formation and *vice versa*. Moreover, to address the inequality analysis on the different socio-spatial levels calls for the simultaneous study of the respective inequality forms, such as class positions or capital forms etc.

This strategy is important, because of the three different reasons. First, the multi-scalar analysis would consider the social power of spatiality (based on mobility and fluid versus

territorialized and fixed) for inequality formation. Second, it would reject over generalization of one specific socio-spatial scale (the global, the transnational or the national) for inequality analysis. Third, the multi-scalar analysis of social inequality will be able to provide evidence on how various forms of social inequality on different socio-spatial scales relate to each other. Are they characterized by confrontational, complementary or substitutable relationships; by the top–down or the bottom–up causalities? In other words, how do the specific inequality forms emerging in the respective socio-spatial level receive their specific meaning in relation to each other?

The second implication is to pay more attention to the process of scaling social inequality. (The scale approach denies defining socio-spatial scales as fixed and pre-given categories.) The review of theories makes obvious that they primarily focus on an inequality formation of a selected scale. The question of how inequality forms on the one (for instance, national) scale become relevant for inequality forms on the other (for instance, the global or the transnational) scale remains open. Consequently, we need to find out more about mechanisms transporting the inequality formation from one scale to another, i.e., mechanisms of scaling. Are these strategies of discursive revaluation of social inequalities (i.e., class positions or Bourdieu's capital resources), as the transnational habitus approach suggests? Alternatively, should we focus on the processes of redefinition of spatiality by actors and institutions?

In sum, the scale approach as a methodological tool gives us a chance to overcome the over-generalization of the global, the national and the transnational socio-spatial scales in the social inequality analysis. It suggests the multi-scalar analysis on the one hand and the scaling strategy on the other to consider the impacts of both the relational and the absolutist understandings of spatiality for studies on international migration and social inequality.

Notes

[1] However, the current migration research highlights the fact that the nation states usually function as both sending and receiving countries simultaneously (Castles and Miller 2003).

[2] Similarly, migration research addresses the interplay between migration and social inequality on the local city-scale in a very specific way (Alba and Nee 2003, Glick Schiller and Çağlar 2009, Sassen 1991, Salzbrunn 2008). However, the review of the relevant research is beyond the scope of this article.

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