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# Theorizing Transnational Class Formation: Novel Approaches to the Study of Transnational Inequalities and Class-Making

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## ABSTRACT

Transnational class formation has been a subject of considerable interest in recent years. This article provides the theoretical and thematic framework to the special theme on ‘Transnational class formation: identities, practices and symbolic classifications’ and presents a review of current literature on transnational social classes, arguing that we need to complement this literature by also considering transnational class-making. We introduce several theoretical approaches and concepts, emphasizing the role of (self-)classification, distinction, symbolic boundaries and intersectionality for analyses of transnational class-making. Drawing on the contributions collected in this special theme, we conclude by presenting some potential challenges and unresolved questions concerning the issue of transnational class formation.

## 1 | Introduction

Social change is a constant in human life. Recent developments suggest, however, that we are currently witnessing profound and often contradictory social transformations across the globe. The last two decades have been occupied with observing the emergence of transnational social fields and spaces (e.g. Faist 2000; Levitt and Glick Schiller 2004), a dynamization of migration patterns (e.g. Castles 2010) and a globalization of labour markets, technologies and communication structures (e.g. Mense-Petermann 2020; Russell and Boromisza-Habashi 2020). The assumption that these developments will continue without interruption is increasingly challenged, however, by escalating political, economic and military conflicts as well as the global health crisis triggered by the spread of the COVID virus. This pandemic has significantly impacted cross-border formations and mobility patterns, introducing heightened border controls and securitization measures (cf., e.g., Radil, Castan Pinos, and Ptak

2021). All of these changes have brought up many questions for the field of transnational studies, as the relevance of ‘the nation’ for social positions, identities and group belonging is being challenged. We add to this debate by explicitly addressing class issues and relations, asking how these changes affect class on different socio-spatial scales, that is to what extent and in which ways do they contribute to the transnationalization of social classes?

Some important research, especially within the fields of migration and inequality studies, has already provided profound analytical and empirical insights on the social processes along which class positions and identities transcend national boundaries in a globalized world (e.g. Amelina 2017; Cousin and Chauvin 2021; Faist et al. 2021; Jessop and Overbeek 2019; Sklair 2001; Weiß and Mensah 2011; Yemini and Maxwell 2018). Nonetheless, some critical points remain that impede rather than enable studying transnational class formation. One of the main critiques that

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continues to influence contemporary migration scholarship is the critique of the ‘ethnic lens’, that is the (often implicit) tendency to relate people who cross borders to discourses around migration, ethnicity and integration (Amelina 2022; Dahinden 2016; Glick Schiller and Çağlar 2006). Research on stratification and inequality, on the other hand, still often follows a methodologically nationalist perspective that tends to underestimate the role of transnational relations and spaces for contemporary class positions and belongings (as highlighted, *inter alia*, by Faist et al. 2021 and Weiß and Mensah 2011). Finally, another fundamental critique that needs to be incorporated concerns the traditional dominance of ‘material’ approaches to class (Amelina 2017, 2022; Anthias 2008). According to this critique, social class is still very often theorized and measured only through socio-economic status and the endowment with material resources. Instead, there is a need to consider also subjective, biographical, cultural or lifeworld-related aspects – a shift in perspective that Lamont (2019) has aptly called a switch from ‘having’ to ‘being’. All these challenges call for thorough consideration when enquiring into issues of transnational class formation.

The articles collected in this special theme address this area for further investigation (Amelina and Schäfer 2024; Drewski 2024; Stock 2024; but cf. also Bonfert et al. 2023 and Hof and Alloul 2023). To this end, we first review existing research on transnational social classes, arguing that we need to complement this literature’s current focus on class structures by also considering class-making and class formation. We then discuss some theoretical approaches conducive for theorizing and studying transnational class-making, bringing in here as well the various theoretical and empirical insights made by the other authors belonging to this special theme. Finally, given the emerging nature of this research field, we do not end with a conclusion but with an outlook on possible future research directions for the study of transnational class formation and class-making.

## 2 | From Class Structures to Class-Making: A Critique of Structuralist Approaches to Class

Previous research on the transnationalization of social classes has often been based on structuralist perspectives by trying to locate class empirically in global or transnational structures. Consequently, it has pointed to actors’ objective positions within global corporate networks (e.g. Carroll and Fennema 2002; González 2019; Heemskerk et al. 2016) or to their endowment with different forms of capital, thus applying Pierre Bourdieu’s concepts within transnational contexts (e.g. Bühlmann et al. 2013; Schneickert 2018). Some of these studies have also integrated further aspects such as educational and professional trajectories and/or lifestyles into their analyses, focusing on the extent to which agents display similarities with regards to these despite different national backgrounds (e.g. Andreotti, Le Galès, and Moreno-Fuentes 2015; Hartmann 2018; Sklair 2001). Finally, some studies have also looked more closely at agents’ habitus, that is at their internalized dispositional structures, asking whether their ways of acting in, perceiving and evaluating the world are still clearly structured by national differences or actually homologous across national contexts (Neckel et al. 2018; Weiß and Mensah 2011).

Most of this research – especially when focusing on corporate networks, agents’ endowment with different forms of capital and/or their professional trajectories – has thus focused on what Bourdieu (1987, p. 7) has aptly called ‘classes on paper’ or ‘theoretical classes’, that is ‘sets of agents who, by virtue of the fact that they occupy similar positions in social space [...], are subject to similar conditions of existence and conditioning factors and, as a result, are endowed with similar dispositions which prompt them to develop similar practices’ (Bourdieu 1987, p. 6). Overall, research on transnational social classes has thus followed a mostly structural approach so far, assuming that similar class-related practices, identities, feelings of belonging and so on will result from a transnationalization of class positions.

A crucial consequence of this approach is, however, that it favours structures over agency and individual and collective practices. Class-making is essentially relegated to the macro sphere, whereas individual and collective action, sense-making and identities are conceptualized as a second-order issue, that is as a result of agents’ structural position in the first place. Contrary to that, we argue that it is also necessary to focus on how transnational classes ‘make’ themselves and are being made – following here Thompson’s (1963) important insights into the historical emergence of the English working class. Analysing transnational class formation thus demands a more actor-centred perspective, focusing on how agents, who engage in transnational contexts, contribute themselves through their practices and (self-)classifications to the construction of transnational classes, that is to transnational class-making. This also involves asking for the specific identities and symbolic forms in which class-related aspects find their lifeworld expression. Rather than treating class as a dominantly structural issue, transnational class-making thus also needs to be considered as a matter of lived experiences (cf. Sennett and Cobb 1972; see also Hof and Alloul 2023). Such an approach also squares with Bourdieu’s (1987) theoretical remarks. After all, he continuously emphasized that, just because people are similarly positioned within the social space, this does not mean that they necessarily see the world in similar ways and feel themselves as belonging to the same groups: ‘the principles of vision and division of the social world at work in the construction of theoretical classes have to compete, in reality, with other principles, ethnic, racial or national and more concretely still, with principles imposed by the ordinary experience of occupational, communal and local divisions and rivalries’ (Bourdieu 1987, p. 7). Therefore, research on transnational class formation also needs to pay attention to ‘the representation that agents have of the social world and, more precisely, the contribution they make to the construction of the vision of that world, and consequently, to the very construction of that world. It must take into account the symbolic work of fabrication of groups, of group-making’ (Bourdieu 1987, p. 10). Previous approaches to transnational class formation thus need to be complemented by studies that take class-making rather than class structures as their starting point.

## 3 | Theorizing Transnational Class-Making

In theoretical terms, analyses of transnational class formation and class-making can draw on a number of already existing

approaches and concepts within social theory, as we will outline in the following and as the contributions of Amelina and Schäfer, Drewski and Stock in this special theme also illustrate. Before discussing these theories and concepts, however, a few comments regarding our take on the term ‘transnational’ are in order given that the concepts of transnationalism and transnationalization have acquired a rather broad meaning since their inception in migration studies. Originally referring to ‘sustained ties of persons, networks and organizations across the borders across multiple nation-states, ranging from little to highly institutionalized forms’ (Faist 2000, p. 189), the focus on cross-border relations, affiliations, practices and social formations is nowadays common across a wide range of disciplines. Given our focus on transnational class formation, we regard two directions within this research as particularly relevant. The first direction has paid attention to how migrants’ practices and identities are affected by their engagement in transnational relations, thus emphasizing the relevance of (microsocial) cross-border interactions and relations for the emergence of broader transnational social formations (cf., e.g., Barglowski 2019; Bonfert et al. 2023; Faist et al. 2021; Rye 2019; Zontini and Reynolds 2018). Some insights from these works are also relevant for the analysis of transnational class-making. Rye (2019), for example, pointed out how migrants, who frequently move across national borders and live their lives in multiple social contexts and class systems, are subject to complex and inconsistent class positions. Faist et al. (2021) used the concept of subjective and objective positions to highlight the intersections between social and spatial mobility that are often ambiguous in their effects and subject to profound changes over time. They showed that migrants’ identities are not necessarily derivative of their objective social position in the structure of social stratification: On the one hand, because migrants compare themselves to others who did not migrate or contrast their current situation hypothetically to one in which they did not migrate. On the other hand, migrants also project for themselves a better future in a context that they deem to be more meritocratic than the context that they left, which lets them evaluate their current position as better than it ‘objectively’ is (cf. also Bonfert et al. 2023; Parutis 2014; Varriale 2023; and, within this special theme, Stock 2024).

Rather than focusing on cross-border interactions and relations, the second direction focuses on specific social sites, often of some organisational kind, that are considered transnational in nature as people coming from various national and cultural backgrounds typically meet and interact there with each other. Thus, various authors have enquired into (elite) schools as potential sites of transnational class formation (Cheung Judge 2024; Drewski et al. 2018; Lillie 2021). But one may also think here, for example, of multinational companies and professions such as finance managers or IT professionals (e.g. Beaverstock 2005; Mense-Petermann 2018; Neckel et al. 2018; Weiß and Mensah 2011) or of the supranational institutions of the European Union (e.g. Lewicki, 2017; within this special theme, Drewski 2024).

No matter which direction within transnationalism research studies on transnational class-making follow, Pierre Bourdieu’s theoretical oeuvre is a common point of departure. Especially his notions of classification and distinction are relevant here as they draw attention to the various ways in which agents classify others and/or are being classified by others, thereby giving rise to

shared lifestyles, feelings of in- or exclusion and class belonging as well as to the (re-)production and justification of social inequalities (Bourdieu 1984, 1987).<sup>1</sup> In her study on the social positioning strategies migrants use to preserve their middle-class status across national contexts, Stock (2024) shows, for example, that distinction practices play a central role as they allow these migrants to set themselves apart from working-class migrants (e.g. by stressing one’s ability and freedom to choose, including the option *not* to do something, and by perceiving working-class migrants as ‘giving in’ to difficult conditions and lacking an ‘attitude of perseverance’). Interestingly, Stock (2024) also finds that all her middle-class participants, despite originating from different countries and having quite diverse migration experiences, are unified in the ways they classify themselves and others.

Bourdieu mainly focused on how agents use economic and particularly cultural markers of distinction. Lamont (1992) extended this line of argument by highlighting the role of moral criteria for distinction-making, drawing on the concept of symbolic boundaries. Symbolic boundaries are ‘conceptual distinctions made by social actors to categorize objects, people, practices, and even time and space’ (Lamont and Molnár 2002, p. 168). As Lamont (1992, p. 11) also pointed out, however, *any* characteristic may be used as material for symbolic boundaries. The boundary concept thus directs attention to agents’ boundary work, that is the ways they define their identity in opposition to others (Lamont, 1992, p. 233), and to how this contributes to group formation and in- or exclusion. This requires taking an emic, that is agentic perspective (cf. Amelina and Schäfer 2024), instead of perceiving groups in an essentialist manner as somehow given and fixed along specific characteristics in the first place (cf. also Wimmer 2013). One example for such an approach is the case study of officials working for the European Commission by Drewski (2024). Whereas previous research has often portrayed these officials as a prototypical example of a transnational social group (given their strongly European orientation, their cosmopolitan habitus and transnational capital endowment), Drewski (2024) highlights how symbolic struggles among these officials over language issues, especially the use of French as a working language within the Commission, lead to intra-group symbolic boundaries (cf. also Lillie 2021 for a similar account of intra-group divisions among a supposedly transnational social group).

If agents’ (self-)classifications and boundary work may relate to any marker of difference (i.e. to socioeconomics, culture, morale, gender, ethnicity, nationality, race and/or other characteristics), then intersectionality suggests itself as another relevant theoretical approach for analysing transnational class-making as this approach focuses on multiple social divisions and the formation of social hierarchies based on different social and spatial boundaries (e.g. Anthias, 2008; Yuval-Davis, 2015; cf. also Amelina and Schäfer 2024 within this special theme and Nowicka 2024). Despite a diversity of perspectives among intersectional scholars, there is agreement on two central premises: first, to reject essentialist notions of social divisions and, second, to highlight the relevance of the intersections between multiple inequalities (gender and ethnicity being among the most researched, whereas class has been relatively neglected in current intersectionality debates, cf. Walby et al., 2012). Within intersectional theory, there are also attempts to account for the spatial dimensions of

social hierarchies. For example, Anthias (2008) coined the term ‘translocational positionality’ to discuss spatial and temporal dimensions of social hierarchies as processes rather than as fixed insertions into a nationally bounded system of stratification based on socio-economic characteristics (cf. also Yuval-Davis, 2015). In Stock’s (2024) analysis, the relevance of an intersectional lens for understanding middle-class migrants’ transnational social positioning becomes apparent when looking at the role of citizenship: Although all participants in this study succeeded in preserving their middle-class position, some of them, especially non-EU migrants, also reported experiences of ‘class anxiety’, that is fears/experiences of insecurity or actual experiences of status loss resulting from global capitalist structures and coercive migration regimes (linked to both countries of origin and destination), as their legal status, work access and the recognition of skills and qualifications were strongly mediated by citizenship (Stock 2024).

However, theorizing transnational class-making does not have to be confined to Bourdieu’s concepts, the boundary approach and intersectional perspectives, as the contributions to this special theme attest. For example, in his analysis of symbolic boundaries among EU officials, Drewski (2024) also draws on the sociolinguistic notion of ‘language ideologies’ which refer to the ‘socially embedded, metalinguistic beliefs about the nature of language and its forms of use’ and involve ‘judgements about the quality and status of different languages and language varieties’ (Drewski 2024, p. 4). This highlights that all forms of classification and boundary-making are ultimately bound up with broader cultural systems and repertoires which shape the ways agents perceive, evaluate and act in the world. For studies of transnational class-making, this raises the question of how agents in transnational contexts engage with different cultural systems (on this point, cf. also Bonfert et al. 2023; Carlson and Schneickert 2021; Nowicka 2015). Stock (2024) suggests an answer to this question by pointing to two class-related practices migrants perform in order to secure their middle-class status across borders: One practice is to frame embodied cultural capital, acquired in the country of origin, as transnationally relevant capital, that is also valuable and beneficial in the country of destination; the other is to use ‘code switching’ (another linguistic concept), meaning, migrants’ familiarity with class-related cultural codes and practices from different national and social contexts allows them to successfully adapt to different situations both in their country of origin and destination.

Amelina and Schäfer (2024), in their contribution, go the furthest beyond the previously outlined theoretical approaches. Departing from an understanding of class informed by Bourdieu, Lamont and intersectionality, they alert us to the fact that class formation processes unfold over long time spans. They therefore suggest examining transnational class-making along three different temporal frames – the *courte durée*, *moyenne durée* and *longue durée* – following thereby Fernand Braudel’s distinction (Amelina and Schäfer 2024). According to them, *courte durée* analyses need to focus on the contradictory positionings of agents within different (national) stratification systems, not just in terms of their (self-)attributed class but also with regard to other categories of inequality such as gender and ethnicity. This concurs with our previous call for an emic perspective on transnational class-making that is open to the plurality of criteria agents may possibly draw on in their boundary work.

A *moyenne durée* perspective, on the other hand, is useful, according to Amelina and Schäfer (2024), for tracing genealogically the Eurocentric elements in traditional class analysis and considering emic markers of class (including their conceptual–epistemological history) instead of imposing European class concepts on forms of transnational class formation in other parts of the world. Looking at transnational class-making processes in the *longue durée*, Amelina and Schäfer (2024) regard two major developments as essential: the emergence of cross-border colonial and imperial relations and the formation and expansion of (racial) capitalism(s). For analysing these, they suggest drawing theoretically on multi-scalar approaches and Bob Jessop’s concept of capitalist imaginaries. In this way, they provide a comprehensive theoretical toolkit for studies of transnational class formation.

#### 4 | An Outlook Rather than a Conclusion

This article provided an exploration of existing scholarship on transnational class formation, aiming to enrich ongoing discussions by adopting a focus on transnational class-making. We offered a theoretical–conceptual framework for this issue by drawing on several theoretical approaches, emphasizing particularly the role of (self-)classification, distinction, symbolic boundaries and intersectionality. These concepts serve as effective tools for theorizing and analysing transnational class formation and class-making, as is also underscored by the other contributions to this special theme (Amelina and Schäfer 2024; Drewski 2024; Stock 2024). Overall, our reflections highlight the necessity of expanding research beyond traditional analyses of class structures to also include a more dynamic and actor-centred understanding of transnational class-making and class formation. We conclude by presenting some potential challenges and unresolved questions concerning these issues.

Future research on transnational class-making needs to address the diverse criteria that agents may use in their boundary work, whether these are economic, cultural, linguistic, ethnic, national, racial or gender-based, for example. It is to be expected that the use of these criteria varies depending on the specific social context at hand. This raises the question of how different criteria intersect, reinforce or contradict one another, thus also influencing transnational class-making processes. As Amelina and Schäfer (2024) show, it is also worth bearing in mind that cross-border class formation is a long-term historical process and that the criteria agents use have their own conceptual history. Theories and concepts thus need to be contextualized in a social, spatial and temporal perspective. This is particularly relevant given current discussions about the decolonization of concepts and epistemologies, not least in the study of global and transnational processes. Another challenge may arise in cases where external boundaries and internal group divisions may diverge from each other and/or occur simultaneously, as highlighted by Drewski (2024) for the European Commission and Lillie (2021) for a Swiss elite boarding school. How do agents make sense then of overlapping, yet possibly contradictory attributions of group belonging and the respective expectations and scripts coming along with these? Further empirical research and debate is also needed on whether such cases should be

seen as indicative of ‘insufficient’ transnational class-making or whether a simultaneity of various boundaries is not rather to be expected, especially in transnational settings. Finally, transnational class-making needs to be related to the dynamics of capitalist economies as these continue to diffuse across the globe, creating various forms of inequality and exploitation. As is well known, the concept of class has been firmly tied to the study of capitalism since Marx and, as Amelina and Schäfer (2024) as well as Stock (2024) clearly show, capitalism also impacts transnational class-making as it fundamentally shapes the wider (economic) structures in which agents perform their class-related practices and (self-)classifications. However, their analyses also reveal that considering the impact of capitalist economies on transnational class formation does not take away the need to place ‘class’ also in relation to other spheres of life and systems of exclusion (linked, for example, to racialized and/or gendered regimes) and thus to categories and ways of (self-)classification emanating from these. This applies all the more for analyses focusing on non-Western contexts where different social and economic conditions may apply (cf., in more detail, Amelina and Schäfer 2024). With these short remarks, we hope to stimulate further theoretical discussions and empirical studies in this emerging research field.

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### Conflicts of Interest

The authors declare no conflicts of interest.

### Data Availability Statement

Data sharing is not applicable to this article as no datasets were generated or analysed during the current study.

### Endnotes

<sup>1</sup> Previous research on transnational classes has also drawn on Bourdieu’s concept of capital, asking to what extent agents are endowed with transnational forms of capital (e.g. Bühlmann et al. 2013; Schneickert 2018). A focus on transnational class-making, however, demands that agents’ capital endowment is not simply taken as given (regardless of how ‘transnational’ it may be). Instead, such capital needs to be perceived as a stake in symbolic struggles, as something whose value may, theoretically at least, be contested and either symbolically elevated or devalued (cf. Drewski 2024 on how French as a form of linguistic capital is contested among officials working for the European Union’s Commission).

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