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**Global Social Inequalities**

Review Essay

Krista Lillemets



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# Global Social Inequalities

## Review Essay

Krista Lillemets

### Abstract

The studies of global social and economic inequalities in social sciences that go beyond “methodological nationalism” are recent but have older roots. The first theories to reflect on the global and trans-regional interconnections and asymmetric regional developments within the capitalist system can be traced back to a Marxian tradition. These theories were critical to the conventional approach to social inequalities (hegemonic in the Western European and US academic centers in the 20th century) restricted to within nation-state boundaries. However, during the last three decades, several new approaches have emerged to capture the construction of social inequalities within the context of transnationalization, which extend beyond defined political units such as the nation-state. Transnationalization is creating a new challenge to social scientists to review critically their premises related to their reference units and to study social inequalities by focusing on social, economic, cultural and political interdependencies from the global perspective. This paper will focus specifically on four different approaches to global inequalities: (1) global and international comparative research; (2) the world-system perspective; (3) the transnational approach; and (4) the approach of entanglements. The aim is to draw a critical balance of these recent approaches, examine the central theoretical arguments and empirical findings, identify shortcomings and make suggestions for further research.

**Keywords:** global inequalities | international and global comparison | world-system | transnationalism | approach of entanglements

### Biographical Notes

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## Contents

<b>1.</b>	<b>Introduction</b>	<b>1</b>
<b>2.</b>	<b>Theoretical and Methodological Challenges of the Sociology of Inequalities</b>	<b>2</b>
<b>3.</b>	<b>International and Global Comparative Research</b>	<b>6</b>
<b>4.</b>	<b>The World-Historical Approach</b>	<b>9</b>
<b>5.</b>	<b>Cross-Border Actors and Transnational Inequalities</b>	<b>16</b>
<b>6.</b>	<b>Entangled Inequalities</b>	<b>22</b>
<b>7.</b>	<b>Conclusion</b>	<b>25</b>
<b>8.</b>	<b>Bibliography</b>	<b>28</b>

## 1. Introduction

Social scientific studies of global social and economic inequalities that set out to go beyond “methodological nationalism” (Beck 2000: 64) have recently gained in prominence, but their roots are older. The first theories to analyze global and trans-regional interconnections and asymmetric regional developments within the capitalist system can be traced back to a Marxian tradition. One could mention here the studies of imperialism by Rosa Luxemburg and of combined and uneven development by Leon Trotsky as well as the so-called second-wave development theories such as dependency theory in Latin America, and world-system analysis developed by Immanuel Wallerstein in the 1970s within the context of reintensification of global flows of capital and people. However, these theories belonged to a heterodox field of theorizing (Wimmer and Glick Schiller 2002), standing in contrast to the methodological nationalism inherent to conventional social-scientific theoretical work on inequalities. The conventional approach to social inequalities which was hegemonic in the Western European and United States’ (US) academic centers in the 20th century was largely restricted to the national scale of analysis. However, during the last three decades, whether because of the preoccupation with the phenomenon of globalization or because of the influence of post-colonial theories and post-modernism since the 1970s (Purdy 2012), several new studies have emerged to capture the construction of social inequalities within the context of transnationalization, in which causes and actors extend beyond a defined political unit such as the nation-state. Although the meaning of globalization itself is still in dispute, the basic argument is that the borders of nation-states have become more porous to people, goods, capital, information and ideas, which makes it more likely that national economies, societies and politics (especially smaller ones) are more than ever tightly tied to global structures. This new process challenges sociologists to review critically their own premises related to units of reference and the analytical weight given “to” national factors in explaining social inequalities and the ways of overcoming them. The question for this essay is to what extent social, economic, cultural and political interdependencies and interconnections are being analyzed in the social sciences and which resources it will need to develop a global perspective to social inequalities.

This paper will focus specifically on the recent approaches to global inequalities. It is possible to identify four groups: (1) global and international comparative research, (2) world-system and world historical perspectives, (3) the transnational approach, and (4) the approach of entanglements. The aim of this paper is to draw a critical balance of these recent approaches to global inequalities by reviewing the academic literature published since 2000. In the first section I will do both, summarize some of the main theoretical and methodological challenges that the sociology of social inequalities is

facing and also present some of the solutions suggested for better analyses of global structures of inequalities. In the sections that follow the theoretical part, the objective is to examine the central theoretical arguments and empirical findings of each inequality approach introduced above. Furthermore, the aim is to identify critical deficiencies in these recent contributions to global inequality research and make suggestions for further research.

## **2. Theoretical and Methodological Challenges of the Sociology of Inequalities**

In Western social scientific research as well as in public debate, inequality emerged first as a national question. It is only after the WWII and decolonization that a global reference unit has become an object of analysis (Therborn 2006). This has created new challenges also to social scientists to review their basic concepts and to go beyond a nation-state centered approach and thereby open the field up to global social inequalities. There are various reasons why this opening should happen. The material life chances (*Lebenschancen*) of people depend up to 60-70% on the geographical place where they were born or grown up and not on the individual achievement. This makes the consideration of the strategic position of the country in the global context highly important. Moreover, the inequality between countries and regions, when measured by gross domestic product (GDP) per capita, is enormous. Furthermore, the world is still politically segmented, which means that the nation-state with its institutions of passport and visa allocates life chances and shapes inequality (Kreckel 2008). Despite the reasons why this opening should take place, according to Reinhard Kreckel (2008), there is an objectively grounded “reception barrier” that prohibits this kind of global opening. He relates the barrier to a research tradition that has its roots in the historical elective affinity between social scientific inequality research and the so-called “social question” that emerged in the second half of the 19th century in European industrial societies. This “social question” refers to issues such as class consciousness, class struggle and class compromise, poverty, labor migration and unemployment, social origin, social mobility, etc. Later the topics of gender and “race” were added. All these issues were always central to sociopolitical conflicts. However, these were conflicts that took place within the national borders and furthermore, gained their relevance there. So these topics have been researched as phenomena belonging within the frontiers of nation-states (Kreckel 2008).

It goes without saying that this tradition is strictly nation-state centric. Furthermore, the key concept of this nation-state centric inequality analysis has been “class”, which has been associated with the structure of stable employment relations restricted mainly

to developed industrial societies (now, OECD<sup>1</sup> countries), where the “meritocratic triad” is anchored (Kreckel 2004: 322). When viewed from the global perspective, then according to Kreckel the majority of poor and the poorest countries function based on other rules of the game that have little to do with values of the achievement society or stable employment relations. Thus, the conventional view of comparative class analysis has increasing problems with analytical depth the further away it moves from its zone of origin (OECD countries).

Like Kreckel (2004, 2008), Ulrich Beck (2007), who has probably best systematized the critique on nation-state centric sociology, argues that it has not been able to respond to the new challenges of comprehending new forms of social inequality because of its historical attachment to the ontological premises and dualisms of nation-state sociology. The meaning of its basic categories of “social” and “political” are based on such dualisms as national versus international, we and the other, internal and external. This attachment has limited the sociology of social inequalities to miss two important aspects necessary for self-criticism: (1) to what extent has the welfare state itself structured the new forms of inequality through its tendency to trigger the individualization of social life, and (2) the way sociology understands social change. Especially sociology’s uncritical involvement in the premises of the nation-state and the welfare state has remained largely unexamined. The sociology of social inequalities has underestimated the role of the welfare state in producing social inequalities not because it has adopted in its imagination the assumptions related to the concept of nation-state but because it has become prisoner to them. This is what Beck calls methodological nationalism.

As a solution Beck proposes something which he terms a “cosmopolitan sociology”, which aims at “reflecting on the ontological premises and dualisms of nation-state sociology and their importance to the basic social and political categories as well as to the determination of sociological research” (Beck 2007: 19). Sociology’s cosmopolitan approach would also mean not considering the globe as one territory, where the laws and values of the modern West will be achieved within the evolutionary process of modernization. It implies denying the existence of one fixed point, based on what the local and national processes of exchange could properly analyze. This means that the “cosmopolitan sociology” aims at both overcoming the provincialism of the national perspective as well as the exotic glance of interaction and conflict of the colonized and the colonizers. It thereby aims to contribute to a new sociological understanding on the phenomenon of social inequality.

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1 Organisation for Economic Co-operation and Development.



Cosmopolitan sociology permits to break off from the methodological “iron cage” of nation-state sociology and raise the question of framing, that is, the question of reference unit or unit of analysis. In addition to the question of “inequality of what?”, one should also raise the second order questions of the “inequality for whom?” (Beck 2007; Fraser 2010; Sutcliffe 2007). The question of “what?” raises the issue of distribution and regulation of material inequality and the question of “whom?” reflects on the “unit of reference”. This second-order question of “whom?” permits to establish a framework in which the first-order question can be asked and politically and sociologically answered. Thus, the central question of cosmopolitan sociology is: how can the frames – units of social inequality across borders between different people and populations – be constructed, so that they are able to include identities and solidarities that are based on interactive classifications and political units other than the nation-state (Beck 2007).

By assuming a critical position with regard to nation-state sociology and adopting a cosmopolitan solution, Beck (2007) not only turns away from a long tradition of research on inequality in sociology concerned mostly with the research of power and domination as well as of social class, adopting instead a concept of milieu (Beck 1983). Although admitting that class society did not disappear totally, the end of the national class-society does not mean the end of social inequality but the birth of a radically new “cosmopolitan” form of social inequality.

By contrast to Beck (2007), who suggests a cosmopolitan look at social inequalities, which would capture the transnational flows and fluxes, Kreckel (2004, 2008) maintains that national borders continue to be relevant in determining the social positions and life-chances of the people. While Beck is highly critical on the international comparisons, other authors argue that the international comparative method continues to be an indispensable instrument of macro-sociological research (Kreckel 2004; Müller and Schindler 2008), but should be combined with other approaches such as the world-system and transnational approaches. By showing that different societies have different institutional and structural responses to similar problems, one is able to avoid premature generalizations about globalization effects. It demonstrates how individual nation-states still mediate the impact of the world capitalist order on their citizens. The respective context of each state in turn exercises a substantial influence, and the empirical diversity turns out to be much broader than anticipated or assumed by various hypotheses of globalization theories about the weakening of the factors of the state and labor. The difference has mainly to do with political influences, e.g. type of welfare state and domestic social conflict constellations. All in all, what Kreckel (2004) affirms is that not only socio-structural determinism but, more importantly, that the existing

national diversity of development paths, power constellations and political possibilities, despite significant structural constraints, should be also taken into consideration.

Thus, Kreckel (2004, 2008) emphasizes two elements that global analysis of social inequalities should take into consideration: (1) the interrelation of scales (global, national and local) as well as (2) the plurality of social inequality. Göran Therborn's (2006) analytical framework of global inequalities points in the same direction, when he argues that although empirically the analytical object is the globe, the aim is to "grasp the global multidimensionality and global cum sub-global causality" (Therborn 2006: 3). Therefore, a global framework would consist of three variables: global history, global entanglements and global flows. Global history refers to the past transnational interactions and their legacies in shaping for example the post-colonial inequality structures. In essence, global entanglements mean cultural and institutional interconnections of nation-states and transnational movements, and global flows consists of flows of trade, capital, people, ideas and information. In this model, the interactions of these variables, which also reflect the contemporary and historical entanglements between Western and non-Western societies, unfold into variety of interconnected inequality paths.

This paper suggests that the division of recent approaches to global social inequalities in four major groups could be a way to respond to the theoretical and methodological dilemmas raised by Kreckel (2004, 2008), Beck (2007) and Therborn (2006). The first group – the global and international comparative approaches – concentrates on socioeconomic comparisons between nations, regions and citizens of the world, but at the same time takes into account the role of international organizations, global rules and norms (Milanovic 2007; Kreckel 2008; Sutcliffe 2007; Müller and Schindler 2008; Greve 2010; Thompson 2007). The second group – the world-system and world-historical perspectives – takes the world as a single reference unit and focuses on the inequality of power and wealth of nations and regions (in the core, semi-periphery and periphery) historically produced in the process of global flows of goods, capital and people. This group has made an important contribution by exposing the historical formations and articulations of national and global inequality structures (Bornschieer 2008; Korzeniewicz and Moran 2009; Souza 2011, 2012). The third group consists of the transnational approach, which has at its center flows of people, capital, goods, symbols, risks and ideas as well as new identities emerging in transnational and pluri-local spaces (Pries 2008; Weiß 2005; Weiß and Berger 2008; Faist 2010; Fraser 2010). Finally, the fourth group – the approach of entanglements – permits to understand how the articulations of transnational flows and actors as well as economic, political and legal asymmetries constitute inequality regimes relationally through time and space

interactions (Therborn 2003; Randeria 2000; Costa 2011; Boatcă 2011; Góngora-Mera 2012; Manuel-Navarrete 2012).

### 3. International and Global Comparative Research

The first group of studies to be examined comes from the field of international and global comparative research. Prominent examples of this group are published in a volume *Global Inequality. Patterns and Explanations* edited by David Held and Ayse Kaya (2007). The chapters are focused mainly on showing the historical trends of international and global economic inequality. The studies use three types of economic indicators: (1) international inequality measured by GDP per capita (unweighted between-country inequality), (2) GDP per capita weighted according to the population size (weighted between-country inequality per capita), and (3) redistribution of income between all world citizens (global inequality, including the within-country and between-country inequalities). The most renowned researcher on that field is Branco Milanovic (2007). He examines the international and global inequalities throughout five different periods: first globalization, de-globalization, the inter-war period, the period of developmental state (post World War II) and neoliberalism. According to his data analysis, unweighted inequality (measured by the Gini and Theil indices) has demonstrated an upward trend, with some oscillations, since 1820. It tells us that differences between country incomes are much bigger today than they were two hundred years ago. When it comes to weighted inequality, there is an upward trend between 1850 and 1950. However, there is a dispute when it comes to the inequality trend within the period of 1970-2000. By using these three indicators, three trends during this period can be identified: (1) unweighted international inequality has marked an upward trend since the late 1970s; (2) weighted inequality decreased since 1978 due to the growth of China and India; (3) within-country inequality has increased almost everywhere; and (4) global inequality, which is measured based on household surveys has not shown any clear pattern, except a slight decrease since 1998. However, global inequality remains extremely high – around 62-66 measured in terms of the Gini Index. It expresses a complicated pattern because it is influenced by very different opposing forces. Milanovic names three: first, fast economic growth in China and India – very populous and very poor nations – pushes world inequality down. Second, the relative decline of many poor and middle-income countries has contributed to the growth of global inequality. Third, higher inequalities in large nations such as China, India, the United States of America (USA) and Russia increase global inequality. He argues that in order to understand the complexity of global inequality today, it is necessary to focus on the interaction among three components: (1) the rich countries of the West; (2) urban incomes of China and India; as well as (3) rural incomes of China and India.

All in all, we can witness a growing polarization at the world scale. According to Kreckel (2008) it would mean that on the global power field of center and periphery it is impossible to verify any new middle-status states. A global middle layer would be one sign of mitigation of world-wide inequalities and its contraction would argue instead for conflicting polarization. However, the data rather confirms the polarization tendencies and a highly stable center-periphery structure. It also shows relatively less welfare mobility over time, which means that the new global norms/frames of action have not delivered fewer inequalities, contrary to the developments within 19<sup>th</sup> century Western European nation-states that resulted in deep change of social structures with fewer inequalities.

Thus, the work of Kreckel (2008) and Milanovic (2007) supports the argument that world development is patterned according to dualism. It implies that Marxist version of dualism as continued polarization of rich and poor countries makes more sense than a lead/lag dualism which offers an opportunity for the lagging countries to catch up with the leading ones (Sutcliffe 2007). For example, despite China's enormous growth during the last decades of the 20th century, its GDP and income per capita in relation to the USA in 2000 was about the same as in 1900 (67% and 12% respectively) (Sutcliffe 2007).

In that case it is pertinent to ask, as Milanovic (2007) does, why has there not been any convergence despite the economic policies which have converged during the last 20-30 years? One of the explanations is that divergence of outcomes may co-exist with convergence of policies if the same set of policies is being applied in different institutional settings. Thus, the scholars of the research field of international comparisons argue that the analysis of societal and global interdependencies should take place based on a secure understanding of development conditions as well as particular institutions and historical conditions localized within societies (Müller and Schindler 2008; Greve 2010).

Grahame F. Thompson (2007) questions as well the convergence argument of liberal economic theory, according to which globalization leads to increased growth rates, which results in convergence between rich and poor countries in terms of development outcomes. First of all, he questions the assumption that there is indeed a single global economic system. Economic activity turns out to continue to be concentrated nationally and regionally, that is, in economic blocs like the European Union and East Asia. Furthermore, one can observe a divergence between poor and non-poor countries, since only a few poor countries have managed to integrate to the global economy. For the most part, it is the rich countries which are converging among themselves,

which means that at the global level it is possible to observe a further polarization. Economic activities – trade and financial integration – remain sub-global, that is, they continue to occur primarily between developed countries. The same can be said about multinational companies, which still remain for the most part national or at best regional in their operating characteristics. So, the suggestion is that inequality studies should concentrate on the emergent consolidation of supranational regional trading blocs rather than on “globalization” as such.

By observing three historical periods, Thompson (2007) argues that rich countries, as a group, are converging in terms of growth, productivity and living standards among themselves, and diverging from the rest. During the first round of globalization from 1870-1914, the relative gap in income and productivity and the gap in industrial structure in relation to the industrial core of the world economy both widened. During the interwar period, despite de-globalization, there was some global convergence of between-country GDP per capita and the so-called “convergence club” expanded during this period. After the WWII there was a change in the “convergence club”. Some East Asian economies joined and older members of Latin America retreated. Therefore it could be said that convergence in terms of inequality is a phenomenon which is potentially independent of international economic integration and globalization.

The question then becomes why this structural divide between the “convergence club” and the rest persisted for so long. In order to answer to this question, it would be necessary to observe closer international trade, migration and capital flows. Since 1970 there has been a massive growth of foreign direct investments, but these are mainly flows among developed countries, that is, the convergence club has invested primarily in itself.

With regard to migration, which is another element of divergence, the question is, what is the impact of migration on the relative distribution of incomes within the advanced countries? Has the supply of unskilled migration from the “South” to the “North” contributed to the growing within-country inequality between wage earners in these countries? The research shows that most of the migration, however, is skilled migration from the least developed countries to the more developed countries. Furthermore, migration also connects with trade. An Analysis of the skill content of the trade of commodities and services, permits to connect the within-country inequalities to between-country inequalities. A large part of the low-skilled manufacturing has been relocated from the advanced countries to the developing countries and the output is then sold back to the advanced countries. By reviving the arguments of dependency

theorists, Thompson (2007) concludes that trade and unequal exchange related to it expresses the tendency of divergence between countries and regions.

Several criticisms could be made on the international comparative research approach. First, although some studies permit developing a historical understanding of inequality trends, they are usually highly empiricist and focused on hypotheses from economic theory, and thus miss important aspects of the causal relationships at hand. Secondly, there is no place for interconnections and entanglements between world regions, global, national and local dynamics. Thirdly, it is limited often to the formal discussion whether inequalities are decreasing or increasing, without reflecting on the value positions and methodology-related questions. Fourth, the international comparative approach does not overcome the deficiencies of methodological nationalism. In contrast, according to Kreckel (2004, 2008) the center-periphery model permits to overcome several of these deficiencies included in the international comparative research. It permits the advancement of a theoretical understanding on how structural inequalities are historically produced, reproduced and changed on the asymmetrical power-field and, indeed, in interaction between local, national and global scales.

#### **4. The World-Historical Approach**

Researchers in the world-system and world-historical traditions analyze the historical-institutional formation of persisting and long-standing inequalities. The emphasis is on the interdependencies between world regions and between global and national economic and political structures as well as on global class formation.

One interesting contribution to the analysis of global inequality comes from Volker Bornschier (2008), who in a long-term historical analysis combines material inequality with political inequality within and between societies, showing the increasing and decreasing tendencies within the world-system. Political freedom within societies is defined here as a political form of democracy, which in contrast to autocracy, goes hand in hand with more political equality of citizens. Between societies, political inequality is expressed in two phases: (1) as a relationship of colonial states to their colonies; and later (2) as neo-colonial dependency relations, which in a post-colonial era were developed in the context of international organizations as the International Monetary Fund and the World Bank. He identifies four historical constellations. First, he argues that more than 350 years of colonial history were marked by an enormous political inequality and low material inequality between countries. Inequality within this period was mainly manifest within societies and between classes and regions, whereas inequality between countries was relatively low. Second, in the 19<sup>th</sup> century occurred what could be called



a “double peripheralization”, which implied that both material and political inequalities started to increase, combining deindustrialization (unequal industrial modernization) and political domination and subordination through colonial subjugation (imperialism). During this period, one could also witness a transition from within-country inequality to between-countries inequality, given that sixty one per cent of all material inequality in the world was expressed in the difference of average welfare between societies. Third, the history of inequality after 1945 shows a combination of diminishing political inequality between states, in terms of power, as well as stabilizing material inequality. It is motivated by two parallel movements: rising state socialism against the core and decolonization as well as collectivization and resistance movements in the so-called “Third World” countries. Nevertheless, within the states, the political inequality in terms of power and “real” relations between the citizens remained very high. Finally, with the decreasing “Third World” movement and the collapse of socialist regimes, political inequality between countries started to increase again, but while democracy levels within countries rose remarkably, at the same time material inequality worsened both between and within countries.

Thus, according to Bornschier’s (2008) interpretation, a world history of inequality includes various oscillations. The question is, however, how to explain theoretically the recent phenomenon of growing material inequality in both rich and poor societies as well as the coexistence of growing material inequality and deepening democratization within countries? In order to respond to these questions, he and various other authors (Kreckel 2004, Thompson 2007) have dug out the old explanatory models of modernization theories, whose best example is the inverted U-curve model of Simon Kuznets (1955) and the theoretical approach to social stratification by Gerhard Lenski (1966).

Drawing from Kuznets (1955), according to whom inequality increases proportional to the mobility from low- to high-productivity sector (mobility from an agricultural to an industrial society), Bornschier (2008) develops a heuristic dual model. He relates the recent growth of material inequality with contemporary technological change and argues that the transition from the industrial to the service sector results in “new dualism”. Hence, he contests the common argument that there is a direct connection between growth and inequality. Instead, his structural approach demonstrates how growing inequality has developed concomitantly with economic growth in the context of technological change. The structural change – dislocation of employees from less productive to more productive sectors – worsens inequality for a long period of time, while the boost of productivity causes total growth. In other words, the same structural change produces at the same time more material inequality and more economic growth. The emergence

of the new service sectors – telecommunication and biotechnology – has changed the demand from a less-qualified to a semi- or highly-qualified labor-force. It is highly productive and high salaries are paid. As a result the income differences between less and more qualified employees have increased. Hence, the income inequality has been caused by two factors: a growing tertiary sector and income differences between old and new technology sectors.

In order to understand the mutual influence of material and political inequality, Bornschieer (2008) and Kreckel (2004) recover the explanation of Lenski (1966), according to whom material inequality at first increases with economic development, but then again decreases at higher development levels. The negative trend will be reverted specifically by political development, or by deepening democratization. Here the regulatory instruments under the political form of democracy can play a significant role in decreasing social inequality. Thus, the outcome of inequality can be mitigated when the dislocation of employees from one sector to another can be controlled and regulated. That increases the importance of the political actors to conduct the transition between economic sectors and to create greater social tolerance. This can be reached through coordinated capitalism as a political strategy. Coordinated capitalism includes political institutional arrangements that cushion the inequality structure especially in more advanced societies. Furthermore, the development of these institutional arrangements can help to understand the differences across societies when it comes to inequality levels. For example, one of the reasons for the increase of income inequality in Anglo-Saxon countries, according to Bornschieer (2008), is that they have dismantled their moderate levels of coordinated capitalism during recent decades. In the peripheral countries, in contrast, institutional arrangements of coordinated capitalism to guarantee equalization and compensation have been historically much less available, which may also explain higher levels of inequality there. The exception here is China where the strong state control of economy and the growing socio-economic inequalities have been taking place simultaneously. Thus, also Bornschieer refers to the state as an important actor in mediating the effects of global capitalism. Although is the analysis being placed within the world-system perspective, the model that he develops is rather static. The interrelations between core, semi-periphery and periphery are not made explicit, instead each follows its own path of development, although in an asymmetric world-system.

In their book *Unveiling Inequality* Roberto Korzeniewicz and Timothy Moran (2009) assume a critical stance to those inequality studies that use over-reaching theoretical models centered on modernization and industrialization theories. These studies, according to them, create explanations such as Kuznets' (1955) inverted U-curve that



overall predict a somewhat uniform evolution of inequality across nation-states as they progress through the stages of economic growth. Korzeniewicz and Moran (2009) also distinguish themselves from theories that seek explanations of inequality from within-country inequality trajectories or that explain stratification by people's relative achievement and effort. Instead, departing from dependency theory and early works of Immanuel Wallerstein, Korzeniewicz and Moran employ what they call a world-historical perspective, in order to elaborate an alternative theoretical understanding of how global inequality has unfolded historically over time and space, unveiling complex interdependencies between different regions over a long durée. The unit of analysis of this world-historical perspective is not the nation-state but the world as a whole. From this perspective they study two different paths of social mobility: (1) changes in the relative position of nation-states within the international income distribution, and (2) alteration in the relative position of individuals and groups within the global distribution of income, emphasizing especially ascriptive categories as the mechanism of structuring the mobility chances. They concentrate on the time span of 1800-2000 and focus on Western Europe and Latin America and Africa as regions on two extreme sides of the world inequality pattern.

Through an analysis of the Gini coefficients of 98 countries, they distinguish between two inequality clusters: high-inequality equilibria (HIE), which include countries with a Gini coefficient of 0.329 or lower, and low-inequality equilibria (LIE), which include countries with a Gini index 0.501 or higher. The HIE cluster comprises Latin American and Sub-Saharan countries as well as India – regions which were the epicenter of wealth accumulation from 1500-1800. The LIE cluster includes most of the Western European countries and North America, which at that moment were marginal and poor. Their long-term inequality data analysis shows that the position of countries has not changed since 1800. Moreover, they claim that the persistence of low and high inequality clusters cannot be explained only by domestic factors. To the contrary, the position of a country in the world economy and its internal inequality are highly connected, which is to say that they are part of a single economic and political system. Furthermore, the clusters are political constructions since they are the products of the struggle of political and social forces.

Instead of looking at social inequalities from the perspective of exploitation, this theoretical framework understands social inequality within and between countries as an outcome of institutional arrangements. Drawing on Joseph Schumpeter (1942), they argue that institutional arrangements are the historical innovation which distributes relative gains and losses triggered by the process of "creative destruction".

By thinking of these institutional arrangements in terms of different inequality equilibriums, then in the HIE cluster extractive institutions prevailed and enhanced the opportunities for elites, but restricted the access of the majority population to property and political rights. These institutions are characterized by “selective exclusion”, which serves to reduce competition among elites through institutional arrangements that simultaneously enhance competitive pressures among excluded populations. At the same time, the criterion of selective exclusion is categorical and ascriptive, using e.g. “race”, interpersonal relations, gender. By contrast, in the case of the LIE cluster, the economy is organized around free labor, an institutional arrangement that emerged in the 19th century in response to certain rigidities that came to characterize the coercive institutions characteristic of the HIE cluster. Unlike in the HIE countries, in the LIE countries the population had considerable access to property and political rights. Hence the institutional arrangements constitute relative inclusion and the criterion of inclusion is universal and based on individual achievement, e.g. skills and competence. More than being only nationally bounded, institutional arrangements are relational mechanisms of regulation within countries, while at the same time influence also interactions and flows between countries. Korzeniewicz and Moran argue that certain innovations shake existing economic and social arrangements and thereby drive cycles of prosperity and cycles of depression. Thus, through “creative destruction”, innovations create wealth and scarcity, which is one single process undergoing constant renewal.

This theoretical framework allows an understanding of how the institutional arrangements that are prevailing within countries contribute to between-country inequalities. Its relational dynamic shows how the processes that create wealth in some countries may be suppressing wealth in other countries as it happened with forced labor practices, which were once very efficient tools of wealth creation in the HIE countries. Between-country inequality is dominated by high inequality equilibrium (HIE). National borders of states reduce internal competitive pressure but enhance competitive pressure outside. Now the principle of institutional arrangements is again “selective exclusion”, but this time the excluded populations are located outside national borders. The criterion of stratification is categorical and based on citizenship and national identity. From the global perspective the institutional arrangements both universalize and simultaneously exclude on the basis of national identity, which means that in LIE countries the privileges created within-country are based on both exclusion and “ascribed” characteristics.

Although Korzeniewicz and Moran (2009) have contributed with an original, thought-provoking and potentially ground-breaking approach to transnational inequalities, which abandon the dichotomies created by modernization and industrialization theories in favor of a theoretically elegant single continuous process, their claims need

further development and refinement. Capturing so many countries in their analysis, but at the same excluding the important ones like the USA, Russia and China, results in very large generalizations and abstractions, which leads to treating regions and societies as homogeneous entities, obscuring considerable internal inequalities, ambivalences and contradictions. For example, although they try to distinguish themselves from the theories of modernization, which are captive to dualist models (agricultural and industrial societies), their high level of generalization leads them to fall back on problematic culturalist explanations and dualisms which are also a characteristic problem of modernization theories. So, their model remains based on dualism: the values that prevail in the Western Europe are associated with purportedly fair standards of achievement, meritocracy and universalism, while in the peripheral regions (Latin America and Sub-Saharan Africa) the dominating values are inherently unfair: ascription and particularism. Their argument that the roots of current inequalities or equalities can be found exactly in these so-called original developments, render their model susceptible to reliance on undertheorized cultural models. This kind of historical and culturalist determinism obfuscates any understanding, for example, of the variations of democratization of political rights in Latin America, or of growing socio-economic inequalities within supposedly homogenous “Western” countries themselves. Moreover, a solution to overcome inequalities which have persisted over centuries nevertheless still falls within the scope of liberal modernization theories. Overcoming ascriptive values adding property rights are argued to be sufficient to undermine the persisting asymmetries. Therefore, this model, although building a relational understanding on regional inequalities, comprises the danger of falling into a static historical perspective on inequalities, omitting the possibility of understanding the qualitative social change at the political level both inside countries and throughout particularly the region of Latin America.

In addition, they suggest combining within and between-country inequalities by creating income deciles for all the countries included in the model, distributing them in clusters in order to analyze social inequality and mobility. By analyzing the world income distribution today by income deciles, virtually all the deciles of high-income nations are contained within the wealthiest world quintile. For example, they claim that even the bottom 10% of the US population is on average better off than the top strata of the populations in countries such as Bolivia. The mechanism of stratification here is what comprises a socially recognized and legitimate skill. This finding, according to them, challenges conventional mobility studies, usually concentrated on wealthy nation-states. It implies that global stratification does not mean simply adding up the “elites”, “middle classes” and “working class” or “poor” from different countries, “as if they all occupied the same objective position in terms of interests” (Korzeniewicz and

Moran 2009: 99). Instead, the national identity and national citizenship become the crucial axis of inequality.

The last example within this approach comes from the research endeavor to understand the construction of global social classes within the world-system. Although limited to a certain geographical space (Brazil as a paradigmatic example of unequal modern peripheral country), Jessé Souza (2011, 2012) is studying the global class struggle and formation of global under- and middle classes as transnational categories. Like in world-historical research, developed by Korzeniewicz and Moran (2009), Souza is critical to approaches which are nation-state centric or relate stratification to individual achievement and effort, which tend, he argues, to conceal the perception of general logic of globalizing capitalism shaping the global class formation. By taking the globe as a unit of analysis, the focus is on capitalism's symbolic structure, which makes up the universal principles and mechanisms of classification and declassification that function in all modern capitalist societies, be they central or peripheral. This symbolic structure allows an understanding of class formation and struggle as global phenomena. But even while claiming that there is a symbolic structure common to all the capitalist societies, however, there are still basic differences between center and periphery. The difference is expressed by the fact that a larger proportion of socially excluded and marginalized people live in the peripheral societies. Although different in that sense, they are not essentially distinct in nature, which is to say that in this framework it is not reasonable to distinguish the countries in the center and in the periphery according to the homogeneous institutional cultures. In the core, universal and achievement-related values prevail, while ascriptive and particularistic norms are predominant in the periphery. What is common to either Brazil or France or Germany is that inequality in modern societies is based on unequal access to economic and cultural capital (using the categories of Bourdieu). This unequal distribution of resources is the basis of everyday social struggles of groups and individuals over both their material and immaterial resources. Hereby the access to impersonal economic and cultural capital has been stressed as a key-issue in order to understand the formation of the modern Brazilian middle class as an "intellectual labor" in opposition to the "manual labor". Another element, which is common to both societies, is that this difference in access seems natural and legitimized by the "ideology of merit" opaque, when in fact this obscures the logic of the social construction of differences in achievement among individuals and classes. What remains visible is the difference in natural talent.

Souza's (2011, 2012) reference to "symbolic structures" inherent to global capitalist logic, working both in the center and in the periphery, could be a contribution to an interconnected understanding of global structures of inequalities, specifically in terms

of transnational fluxes of ideas and their unequal and selective incorporation in specific geographical contexts by social classes. However, his center and periphery concept is rather static, appointing more to distinct and geographically defined citizenship patterns than to interconnected transregional and historical formations.

## **5. Cross-Border Actors and Transnational Inequalities**

The contributions coming from the researchers of a transnational approach to inequalities do not focus on historical formations but specifically on the synchronic positions and formation of social groups in transnational structures combining several social classifications: class, gender, “race” and ethnicity.

The representatives of the research on transnational inequalities argue that although important for the understanding of social inequality structures, neither the international comparative nor the global approach are able to capture the socio-spatial structures that are being stretched beyond nation-states as a result of transnationalization of socialization. A transnationalization approach goes on the one hand beyond the methodological nationalism of the international comparative approach and on the other hand resolves the risk of the global approach to despatialize and desocialize social inequality.

This line of research concentrates specifically on the cross-border micro- and meso-relations, focusing on the “process of development of relatively durable and dense pluri-local and border-crossing relationships of social practices, symbol systems and artefacts” (Pries 2008: 46). It implies a shift from the conventional “logic of differences” (between and within nation-states and regions) to the “logic of exchange” (e.g. flows and links) (Weiß and Berger 2008: 7). The most common object of study here is migration. According to the “logic of exchange”, transnational migration and mobility processes are considered as interaction and communication relationships that do not take place only between nation-state “containers”. Instead, there are new transnational spaces as well as distinct migrant or class identities that emerge in these spaces. According to Pries (2008), the phenomenon of transnationalization of socialization presents a new challenge to the sociology of inequalities in terms of understanding objective and subjective mobility chances, social positioning of people within the context of new transnational frames of belonging and social structures. Transnationalization of socialization has changed on one hand the national dynamics of social inequality and on the other hand formed new pluri-local frames of reference of social inequality (Pries 2008). Focusing on the “logic of exchange” between the spaces permits to de-essentialize the understanding of space and develop instead a relational space concept.

Like that, very different social spaces that were formerly exclusive in geographic terms can now become “stacked” within one and the same space. That is, a social space can also expand over several geographical spaces and bring about a new transnational social space. Transnational social space itself is conceptualized as “configurations of social practices, artefacts and symbol systems that span different geographic spaces in at least two nation-states” (Pries 2008: 48).

The most paradigmatic analyses on the field of transnational inequality have been developed by Ludger Pries (2008) and Weiß (2005). However, there are other valuable contributions made by other researchers such as Thomas Faist (2010) and Nancy Fraser (2010). Pries (2008) studies employment mobility patterns and transnational biographies among labor migrants who are commuting between the USA and Mexico. Among them are migrants who change countries frequently, which means that the employment strategies and social positions of such transmigrants can be assumed not to depend on just one national opportunity-structure, but neither are they involved in an abstract world-wide job opportunity search. Since the traditional reference unit – the nation-state – does not suffice for explaining the phenomenon of transmigration and the way how the labor migrants are embedded in the structures of inequality, Pries (2008: 74) is developing a new spatial reference unit, which is called a “pluri-local frame”. This reference unit permits to understand the social positions of transnational migrants and their housing, education and employment strategies and biographies that exist above and beyond the social contexts of national societies. At the same time, the pluri-local social space connects one or several places and labor market in the country of origin with the ones in the country of arrival.

In this analysis, Pries (2008) takes into account both objective and subjective dimensions of the phenomenon of transmigration. An objective dimension shows how a change of a country is related to a change of an area of employment, movement within or between the economic sectors. One could observe upward employment mobility – in the sense of traditional mobility research – from the agricultural activities in Mexico to merchant, management, hotel and restaurant related activities in the USA and from these activity areas to technical and academic work in Mexico. With the change from the USA to Mexico, there is also downward mobility from merchant, management, hotel and restaurant related activities to manual-industrial work and from this area to simpler personal services. This change has also a gender bias.

When the objective employment mobility pattern is being compared with the subjective evaluations and expectations, then the migrants who commute often and over several generations between Mexico and the USA, the transmigrants, experience their



employment and social positioning and social inequality structures not in one reference frame, but in the context of three different reference units. They differ between national reference units of inequality structures in Mexico and in the USA.

In addition to these two reference units of social inequality (country of origin and country of arrival) transnational migrants are also oriented to the third reference unit, which results from comparing oneself with other transnational migrants and from the self-classification in their own transnational social-spatial life-worlds. For example, one person, who feels him/herself marginalized and deprived in the country of origin or in the country of arrival, can be classified in the transnational space as relatively privileged in comparison with other persons of the same social space.

Faist (2010) is also concentrating on a spatial unity, studying the transnationalization of social formations, which has created new forms of diversity, that is, cross-border lifestyles. Transnationalization of social formation interacts with known social and cultural categories, such as gender, religion, language and social class. Like Pries (2008), Faist (2010) concentrates on the migration and the ties that migrants maintain with their countries of origin or other regions after settling in immigration countries, forming transnational social spaces, whereby not geographic mobility, but rather continued contacts between migrants and relatively immobile correspondents across borders are decisive. According to Faist, the implications of transnational lifestyles for social inequalities are highly debated, especially regarding the incorporation of migrants in the national realm. Scholarly and public discussions have addressed transnational networks (cross-border social and symbolic ties) and mobility as an important opportunity of upward mobility, especially in the case of highly qualified well-paid specialists. The integration in transnational networks in essence is being considered either as a positive resource or an impediment to incorporation to the country of immigration.

However, the debate on incorporation and non-incorporation is still very much based on the “national container” view failing to look at exchanges across national borders. According to Faist (2010), these exchanges become clear in the case of social protection, which extend across the borders of national states. For example, more than 10% of Dutch public old-age pensions are paid to recipients who are living outside the Netherlands. Other classic examples of mobility of persons and groups which implicates the transnational activities of organizations and international coordination of states, is the social protection of German pensioners living in Spain, but also former labor migrants from Morocco in France returning to their region of origin, or domestic care workers from Ukraine working in German households and the ensuing restructuring of care work in the region of origin. These are examples of cases where

social protection is not necessarily provided and consumed within the territory of a single national welfare state.

In the case of social protection, one could observe a contrasting situation, where, on the one hand EU citizens are migrating within the EU to Spain (or Turkey), and on the other hand, former labor migrants moving between immigration country and their country of origin. Here the marker of transnationality is related to the production of inequality. The opportunities of transnational lifestyles are not only related to the financial means and social resources (e.g. networks of friends and kin), but also macro-political regulation of mobility and legal status of migrants. Legal status of workers (citizenship status) creates a difference between intra-EU mobility of citizens of member-states and labor migrants who return to the countries of origin on a regular basis. EU citizens move within EU countries and continue to benefit from the social insurance schemes in the country of immigration. However, in the case of labor migrants having access to health care services of the immigration country in their country of origin is not so automatic. Whereas the free mobility across member states accompanied by the access to social insurance schemes is not an obstacle to EU citizens, labor migrants, in order to be eligible for public health care schemes, must maintain permanent residence in the immigration country. Therefore it can be said that a transnational lifestyle is enabled by national welfare state policies and citizenship status.

Unlike Pries (2008) and Faist (2010), Anja Weiß (2005) does not concentrate on the question of spatial unity to understand new transnational biographies and life-styles. By using Bourdieu's concept of capital, the work of Anja Weiß (2005) shows how the social positions of highly skilled migrants, possessing a transnationally valid cultural capital, are socially constructed. Although focusing on the skilled migrants localized in Germany, her aim is to explain how the social positions of migrants are partially determined by the capital accumulated beyond the borders of the receiving country. Here the resources and capacity of "exploiting borders" (*Grenznutzen*) that is the transgression of nation-state borders or their instrumentalization for the accumulation of life chances, has become a key variable of social inequality in the globalized world (Beck 2007).

Hence, the social positions on the world scale are structured according to two aspects of social inequality: spatial autonomy and quality of spaces. They consist of three components: (1) the agency of active transnationalization from below; (2) the capacity of border-crossing as constitutive of transnational inequality, which shows how new hierarchies arise beyond nation and class; and (3) the overlapping and the penetration of various trans-border lifestyles in various national spaces of inequality. The quality of



spaces refers to the actor's positioning in the national space in the world-system divided among center, periphery and semi-periphery structures, as well as his/her access to resources and opportunities. Spatial autonomy implies autonomy to choose the optimal environment for actors and their resources. Based on the access to these resources and opportunities, typologies of three classes have been identified: (1) transnational upper classes that are spatially autonomous, that is, national borders do not play a central structuring role in their positioning in social hierarchy (2) the middle layer which tends to be dependent on the national welfare state it is affiliated with, and (3) lower classes that are part of the nation-state only by name. People belonging to the lower classes are exposed to the consequences of a globalized economic system, while remaining geographically restricted to socially and geographically peripheral regions.

Weiß (2005) argues that highly skilled migrants illustrate best the influence of spatial relations on the structuring of their social positions in the world scale. They (1) have overcome personal ties to a specific nation-state as well as political barriers to migration, since nation-states tend to reduce barriers to free movement for these experts, (2) possess transnationally valid forms of cultural capital such as IT experience, medical expertise or esteemed MBAs prized on the global high-skilled labor market, (3) change countries according to demand, and 4) experience little depreciation of their cultural capital when crossing national borders. Thereby, Weiß shows that geographical, social and structural autonomy from the nation-state can be an important aspect of upward social mobility in the world. A migratory life-course may be characterized by social autonomy and is structurally defined as a portfolio of resources that are globally acknowledged. A subgroup of highly skilled migrants combines both of these features. Therefore, spatial autonomy becomes a desirable condition, structuring positions on the world scale.

Nancy Fraser's (2010) contribution to the field of research on transnational inequalities consists in developing a theoretical framework to understand the construction of a transnational category of "global poor" and their struggles for justice, which take place at the intersection of a variety of geographical scales. According to her, justice expresses itself in a variety of scales (plurality of scales of justice), however, the novelty here is that in some cases injustice is not located on one single scale but at the intersection of several scales – local, national and global. This could be understood best in the case of the social exclusion of the global poor. Therefore, there is a need to understand social exclusions that arise transnationally, when processes that operate at different scales intersect.

In the case of the global poor social exclusion arises from the intersection of three distinct genres of social justice, which operate at several scales. Justice in this case is understood as a norm of parity of participation, which requires “social arrangements that permit all members of society to interact with one another as peers” (Fraser 2010: 365). For participatory parity to be possible, at least three conditions must be met: distributive justice, recognition, and democratic representation. Thus, social exclusion in terms of justice as participatory parity implies that social arrangements that institutionalize obstacles to parity of participation are unjust. Thus, social exclusion itself is an injustice because it represents denial of participatory parity.

In order to express the conditions of the global poor, the three-dimensional framework of justice should take into account the question of scale. The issue of scale reveals the question of parity of participation among “Whom in which social interactions?”, or “Who exactly is entitled to participate on a par with whom in which social interactions?”. So far the frame to think about justice has been the territorial nation-state, or the Westphalian scale. The problem with this frame of reference is that it excludes the case of transnational social exclusion, which is exactly the case with the global poor. Within the frame of the national state, the most disadvantages citizens can have is limited to valid justice claims against their own governments and fellow citizens, but cannot be made against “offshore” actors or transnational social structures. Therefore, the Westphalian frame creates black spots that do not permit the acknowledgement of actors, processes and mechanisms that operate at the global and transnational scale. Thus, considering the Westphalian frame as the only legitimate frame of questions of justice, means committing a special kind of meta-injustice.

In that case, the question of frame itself becomes the question of justice and offers sensitivity to the question of scales, and takes into consideration the injustices located at the intersection of scales. It reveals the injustices and power relations contained in the international system of nation-states, in which the powerful predator states and transnational private powers are shielded from the claims of justice of the global poor. Hence, it could be said that Westphalian frame is foreclosing the option for the transnationally excluded to make claims against “offshore architects of their possession” (Fraser 2010: 368).

The level of meta-political injustice permits, according to Fraser (2010), an understanding of the social exclusions that arises transnationally, for example, when global economic forces converge with local status hierarchies, on the one hand, and with national political structures, on the other hand. For her, the best example of the struggle that intersects various scales is the Zapatistas movement in Mexico. Fraser’s theoretical

framework of justice requires a more thorough elaboration of empirical examples, however, to demonstrate fully how exactly exclusion in intersecting scales works in practice beyond this one example.

Studies concentrating on meso- and micro-relations, fluxes and flows, are definitely a novelty in the inequality research. Their strong side is to emphasize the actor-perspective and the identity dimension. However, by concentrating mainly on the synchronic dimension of social inequalities, they remain too ahistorical. In such a comprehensive slice through complexities at the current time, there is little consideration of inequality as a historical formation.

## 6. Entangled Inequalities

The research on entangled inequalities places itself within the scholarship of entangled modernities (first coined by Randeria 2000). What distinguishes the approach of entanglements from the transnational approach is that it does not only explore the global and transnational interconnections in a synchronic dimension, but analyzes the shaping of inequalities through a complex and asymmetric intertwining of global, national and local inequality structures emphasizing specifically the historical formation of inequalities.

Critical towards Eurocentrism, the “entangled modernities” approach does not conceptualize modernity as a certain value-system exported from Western Europe to the rest of the world, as it has been commonly held in modernization theories. Instead, modernity is seen as a temporal concept, related to different paths in modernity. The temporal orientation permits an understanding of modernities in plural, however, not just as a “co-existence of different modernities but also their interrelations, current as well as historical” (Therborn 2003: 295). It also implies that modernity is a global phenomenon, which entails consideration of “global variability”, “global connectivity” and “global inter-communication”. Hence, the attempt of entangled modernities is: “[T]o grasp the present as history with a wide interdisciplinary grip, relating cultures and social institutions and social conflicts” (Therborn 2003: 294).

Furthermore, Randeria (2006) adds that that the idea of pluralization of modernities allows for a conceptualization of paths and outcomes which diverge from the ideal-typical historical experiences of Western societies. Modernization itself is an uneven process resulting in what could be termed as “disparate and divergent but uneven and entangled modernities” (Randeria 2006: 216). In that light, the approach of entanglements aims at showing how global, national, and local social inequality structures have been shaped

by geo-historical, trans-regional entanglements, “interacting and mutually influencing socio-political roads to and through modernity” (Therborn 2003: 295).

As a part of a research project to de-provincialize sociology (Costa 2007) and contest a eurocentric view on transnationalization, Manuela Boatcă’s (2011) aim is to make visible the transregional entanglements that were a social fact already in the 16<sup>th</sup> century in colonized Latin America. She argues that the transnational links between inequality structures of colonizing and colonized countries did not appear independently, but in fact, they were the consequence of the transregional flows of people, goods and capital between metropolitan and peripheral areas. Boatcă concentrates on the process of “creolization” (Mintz 2010) in the Caribbean in the 16<sup>th</sup> century and its continuity within the current transnationalization process. Thus, contrary to the current transnational research that focuses on the structures of inequalities within the current globalization context, her research reveals how transregional flows were fundamental for the structuring of inequalities in Latin America and the Caribbean already on the 16<sup>th</sup> century in the context of European expansion into the Americas, transnational migration, the Atlantic slave trade and the unequal economic exchange. Effects from deep in the past continue to be relevant today for structuring inequality, more so than ephemeral changes in economies, technology, and political regimes.

Critical of the state-centered modernization paradigms, she draws from the world-system and dependency perspectives to explain the emergence of different inequality structures in the colonial era and their persistence until the post-colonial time. She argues that the economic legacy of colonialism that developed in resource-rich colonies with export economies based on slave labor or in resource-scarce colonies with local manufacturing based on wage work is an important point of departure for the contemporary inequality structures divided into low and high equilibrium inequalities (Korzeniewicz and Moran 2009). For Korzeniewicz and Moran, the continuation of this different inequality patterns based on “selective exclusion” between regions since the 19<sup>th</sup> century has been ensured by the operationalization of the criterion of citizenship and nation-state in the context of transnational migration.

Another way to go beyond a state-centric analysis of inequality and focus on a relational, interdependent perspective on the emergence, maintenance and transformation of social inequalities, is to use the concept of “inequality regime”. The regime approach permits inequality to be understood with regard to “asymmetries between positions of certain individuals or groups of individuals in a determined context” (Costa 2011: 25). Drawing from different authors, the “inequality regime” includes five elements: (1) combined logics of stratification (class, “race”, ethnicity and gender); (2) political,

scientific and popular discourses, according to which individual and collective actors interpret and construct social positions of their own and of others; (3) legal and institutional frameworks; (4) policies; as well as (5) forms of every day sociability. All these components can be understood through an interrelation between national, transnational and global frameworks. A regime as such can be described as having been shaped by a different combination of global linkages and can be identified by its distinct combination and interaction of social categorizations.

Manuel Góngora-Mera (2012) applies this kind of regime approach to examine the role of law in the naturalization of ethno-racial inequalities and racial discrimination under the colonial rule and continuities of this role in Latin America until the end of the twentieth century. Instead of focusing on domestic legislation, he applies a legal transnational approach, revealing the invisible historical articulation between law and “race” which has also made invisible the racial discrimination in the region. The emphasis here is specifically on legal discourses that have appeared at the same time in different world areas, and their articulation at the national, regional, transregional and global levels. By introducing the “inequality regime” concept (Costa 2011), Góngora-Mera (2012) bundles the transnational interconnectedness between domestic, foreign and international legal norms (the protective measures of the Spanish crown, the constitutions of Haiti and the USA, English law prohibiting transnational slave trade and international human rights system) into three inequality regimes – caste, racist nationalist and mestizo nationalist – which apply respectively to the articulation between the categories of law and “race” during European rule, after independence and during the 20<sup>th</sup> century. He argues that regime shifts could bring about discontinuities in legal discourses, however, in Latin America one could observe that the articulations between law and “race” that prevailed in the caste regime continued to persist even until the end of the twentieth century. National, regional, transregional or global norms were either not complied with or were unequally applied, which resulted in the legal naturalization of racial inequalities or invisibilization and exclusion of ethno-racial groups. According to the author, the continuities in these practices can be explained by the unchanging global discourse of white supremacy until after WWII. Góngora-Mera’s legal transnational approach permits an analysis where in the foreground are the interconnections between current domestic and global inequalities and colonial racial structures which have left a legacy with which the post-colonial state has to deal.

The perspective on inequalities put forth by David Manuel-Navarrete (2012) in his approach to entanglements is not focusing so much on the interrelationships between different regions, but rather on what Therborn (2003) considers to be a global look at the relationships of social conflicts, their emergence as a result of the entanglement

between global and local scales as well as between past and present times. Manuel-Navarrete (2012) specifically examines how the concept of “entanglements of power” between institutions, groups, people and socio-ecological structures, analyzed in time and space, can explain critically the spatial segregation created by global tourism. Using a North-Mexican Caribbean tourist enclave he argues that spatial inequality has been constructed by a triple pattern: globalization, local configurations of power positions and transnationalization of space. The entanglements of power approach exposes the genealogy of spatial segregation and dialectics of domination/resistance resulting from this triple pattern across time. By following labor exploitation during Spanish colonization and neo-colonial capitalist entanglements within the context of monoculture agriculture and the capitalist appropriation of space for tourism, Manuel-Navarrete (2012) examines how the triple pattern manifests itself in variety of forms and which kind of domination and resistance dialectics result from it. Thus, the author shows how local power positions have to adjust and reinvent themselves in response to the removal of the global power (the Spanish royal government). His historical account presents how pre-Hispanic *batabs* exercised domination over Maya peasants, the resistance of the latter against the expansion of *haciendas*, supported by the local *caciques*. The power relations reconfigure themselves in the neo-colonial period, when the dominant position is still exercised by white Europeans and the resistance strategies against the commodification of space and spatial segregation are put forth by mestizos in conjunction with the party system (the Party of the Institutionalized Revolution, PRI) and still with the ambivalent self-interested support of *caciques*. The process of transnationalization of local space can be understood in a similar way, whereby the global and local actors – the Mexican government, British timber corporations and Spanish tourist corporations related to the distant power of the Spanish crown – interact with the local space, stabilizing and legitimating local positions and privileges. However, the historical study permits to conclude that the hegemonic spatial configuration that resulted from this triple pattern has not been deterministic; instead, it has been bent by local resistance.

## 7. Conclusion

This paper has discussed recent contributions to the debate on global social inequalities that challenge the methodological nationalism. First, it focused on the main theoretical and methodological challenges that the sociology of social inequalities is facing, reviewing specifically the arguments of Kreckel (2004, 2008), Beck (2007) and Therborn (2006). All three suggest various global-oriented solutions to the problem of methodological nationalism in social inequality studies. Beck’s (2007) proposal is a universal “cosmopolitan sociology”, which permits to develop a framing more adequate



to the analysis of global society. For Kreckel (2004, 2008) global inequality can be best analyzed from the structural perspective of a world-system, which is suitable for explaining income distribution and power relations among regions in addition to the multidimensional relations between global and national scales. Therborn (2006) suggests a more flexible and probabilistic global approach, which would be able to capture the interconnected plurality of inequality paths constructed through global histories, global flows and global entanglements.

The paper has reviewed separately four different approaches to global social inequalities as a response to the methodological and theoretical dilemmas. These four groups are: international and global comparative analyses, world-system, the transnational approach and the approach of entanglements. The first approach focuses mainly on inequality in terms of income distribution between nation-states and individuals. Although valuable for understanding that national borders are still strong factors that influence the different inequality paths and different national answers to current globalization impacts, it is a prisoner of nation-state centric analyses and a view that reduces inequality to its material dimensions measurable by the tools of economics. The world-system analysis explains global inequality structures by employing a world-historical analysis, demonstrating how regional inequality structures are the result of interdependent regional flows. Unlike the international and global approaches, which argue that across different time periods international or global inequalities have either decreased or increased, the studies that apply a world-historical approach observe that the main inequality clusters have been persistent throughout the last two hundred years and cannot be explained only by internal, domestic factors. World-system analysis focuses on nations, regions and classes, but creates a relational and interdependent bond between them. Its largest contribution is, that it shows how inequalities between regions have been constructed historically and relationally during a “long durée”. The transnational approach overcomes the deficiency of world-system approach, in which actors and agency play a minor role, and develops instead a micro- and meso-structural analysis of inequalities which emerge in transnational spaces by, for example, migration flows. Finally, the approach of entanglements works with inequality regimes, instead of fixed spatial units, which are shaped historically by asymmetric interactions between regions at different geographical scales. The focus is on transnational and regional flows, actors, as well as legal and power asymmetries, and their impact on social positioning of individuals and groups in global inequality structures. The emphasis concerning history lies on the persistence of colonial inequality structures and their legacy in post-colonial development.

The classification of different social-scientific approaches to global inequality used here is not clearly bounded. Although every approach has its own historicity, they present many commonalities and have more elements in common than the established borders suggest. This is the case, for example, with the world-system/world-historical, the transnational approach and the approach of entanglements, which often seem to complement each other. However, despite these similarities, particularly in emphasizing how important history is, each approach has distinctive components, on which this paper has concentrated separately, with the goal of highlighting the contributions that each one is bringing to the understanding of global structures of social inequalities – and the issues facing the study of inequalities going forward.



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