

**Technical Report:
“Pilot Project for the Panel Study”
Project C1: “Transnationality and
Inequality”**

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1 Survey Design

1.1 Project Description

Project C1, “Transnationality and Inequality: Pilot Project for the Panel Study”, was established within the framework of the Collaborative Research Center’s program “From Heterogeneities to Inequalities” (SFB 882) at Bielefeld University to assess the role of cross-border ties and activities in the production and reproduction of social inequalities. The aim of the project is the development of a transnational panel survey for investigating social inequalities in the context of transnationality.

‘Social inequalities’ refers to the limited access to and unequal distribution of common and desirable social goods and positions that negatively affect the life chances of individuals and groups (Kreckel 2004: 17).

‘Transnationality’ is defined here as a characteristic feature of heterogeneity that relates to relatively constant social and symbolic cross-border ties and practices between individuals and households. Transnationality contributes to the production and reproduction of social inequalities at different locations in transnational social spaces. Because transnationality characterizes individuals and their relationships within a spectrum from low to high intensity and density, it must be understood as a continuum (Faist et al. 2011). It also implies that practices and transactions circulate through transnational relationship networks or must be seen as two-way flows. The pilot project seeks to identify social mechanisms that produce inequality through transnationality. It also expands the scope by including the middle classes and investigates differently positioned individuals as well as different types of cross-border mobility (Faist 2015; Fauser et al. 2015).

To avoid the complexity associated with quantitative multi-sited surveys, the primary survey in Phase 1 is carried out exclusively in the German–Turkish transnational social space. It involves Turkish migrants to Germany and German emigrants in Turkey, as well as their respective transnational contacts. Concerning the German expatriates in Turkey, the main focus of interest is on the so-called *retirement* and *sunset migrants*. This might allow the transnationally active individuals, for instance, to qualify as ‘players in two social contexts’ (Razum et al. 2005), exploiting the advantages of being integrated into more than one socioeconomic context. The choice of two very distinct groups - Turkish migrants who moved to Germany and German migrants who moved to Turkey - should obviate over-adjustment of the survey tools to suit a particular category of individuals.

The aims of the pilot project for a German–Turkish Panel Study are to reanalyze existing datasets (above all, the results of the German Socio-Economic Panel Study [SOEP]) and then to implement a pilot survey, develop tools for both quantitative and qualitative designs, and thus lay the foundation for a longitudinal study designed to investigate social inequalities within the context of the German–Turkish transnational social space. In addition, this particular social space was chosen as a research field because of the decades-long transnational migration between Germany and Turkey. Such migration developed in different social fields, including economics, politics, and religion, as well as at the level of personal relationships among residents of these two countries (Faist 2000; Faist and Özveren 2004). Using both quantitative and qualitative methods, the first phase of the project seeks to identify some of the links between transnationality and other heterogeneities (such as age, gender, and social status on the one hand and the social position of migrants and, partly, non-migrants on the other) in the fields of education, employment, health, and political participation after a re-analysis of existing data from the SOEP and results of the pilot survey of Turkish migrants in Germany and German emigrants in Turkey and their links back to their respective home countries. The project is inspired by the ethno survey of the Mexican Migration Project (MMP) (Durand and Massey 2004; Massey et al. 2003), which also combines these two methods. In contrast to the MMP, the use of quantitative and qualitative methods is intended to utilize the different logics and to benefit from their complementary strengths. The quantitative data allow statistical generalization and the identification of regular relationships in longitudinal section.

The mixed-method strategy has been one of the distinguishing features of our pilot study and will also characterize the future panel study. Compared with studies such as the MMP and the Comparative Immigrant Entrepreneurship Project (CIEP), our study includes differentiated transnationality items in different social sectors such as health, politics, education, and the labor market. The range of transnationality items used for different areas of social life allows us to draw a more complete picture of the subjects' transnational activities and their effects on positioning within the social structure of the host country. The quantitative and qualitative pilot surveys were multi-sited; that is, they were carried out at several places of reference within the German–Turkish transnational space. According to the research design of the project, the quantitative and qualitative parts are organized sequentially, with the qualitative survey meant to contribute its own results and thus be complementary as well as exploratory relative to the quantitative survey (see Table 1).

Table 1. Structure of the transnational panels in the three phases of the Special Collaborative Program

Initial Analysis	Phase 1: Preparation of the Panel		Phase 2: Implementation of Panel I (2015–2019)	Phase 3: Implementation of Panel II (2019–2023)
Step 1	Step 2	Step 3		
Reanalysis of SOEP	Qualitative preliminary study	Development of quantitative instruments and trial study	Quantitative, representative panel; qualitative survey	Expansion of panel; qualitative survey
All SOEP participants	Turkish migrants and their transnational contacts	Turkish immigrants in Germany and German emigrants to Turkey; their transnational contacts	Turkish immigrants in Germany; their transnational contacts	Turkish immigrants and German emigrants; their transnational contacts

The qualitative analysis is more specifically intended to provide insights into the relationship between transnationality and social inequalities. In addition, a qualitative analysis can reveal the interviewees’ subjective perspective on social positioning and help the researchers understand and interpret the results of the quantitative analysis. The quantitative pilot study is intended to attest to the typicality of qualitative findings and to allow for the generalization of the empirical results based on larger samples. Thus, the line of research involves a mixed-method design.

In the following sections, we will first give a brief overview of the current research on transnationality and social inequality. Next, we will explain how we proceeded in operationalizing the theoretical construct of transnationality and cite the international studies used to orient our own questionnaire for the pilot study. We will then consider the SOEP data, which we used to reanalyze the transnational practices of respondents with German and immigrant backgrounds. Subsequently, the different developmental steps and phases of our own standardized questionnaire will be explained in terms of the pilot study. We will then discuss the pre-test and fieldwork of the different multisided part surveys of the pilot study, along with the findings from the different survey phases. We conclude with the first descriptive analyses of our own dataset and a final discussion.

1.2 Research on Transnationality and Social Inequality

A large number of qualitative and quantitative empirical studies have contributed many important insights into a variety of dynamics, contexts, and implications of transnational social activities and transactions, yet very little is known about the possible nexus of social inequality and transnationality. Qualitative migration studies provide important findings on the transnational life worlds of respondents. However, these studies analyze a small number of cases to explore transnational ties and practices among special groups. In addition to that, quantitative studies that can help decode transnationality across social groups are still rare. Those quantitative studies that were conducted in the U.S. (e.g., Portes et al. 2003; Waldinger 2008) and in Europe (e.g., Caarls et al. 2013; Mau and Mewes 2008; Snel et al. 2006) often dealt with the social integration of migrants into a host country and include only a few aspects relevant to the study of social inequalities. In addition, quantitative studies on cross-border transactions use cross-sectional data, making it difficult to determine the causality and procedural dynamics in the relationship between transnationality and social inequality. For example, the Comparative Immigrant Entrepreneurship Project (CIEP) was the first project to provide quantitative evidence that individuals with a higher level of education are more strongly represented in all dimensions of transnational activities (economic, political, and sociocultural) (Portes 2003). However, the causes and the effects remain unclear. Do transnational resources contribute to a higher social status, or is a relatively high educational and income standard a prerequisite for the maintenance of (re)productive transnational ties? Such questions can be examined comprehensively only with the help of longitudinal studies. Moreover, the CIEP did not take into account further implications concerning social inequalities in health, political participation, the labor market, and education, nor changes over time, over generations, or during migrants' life courses.

Most of the available specific studies on the German–Turkish social space that might be considered relevant to our pilot study involved elderly former ‘guest workers’ (*Gastarbeiter*) (e.g., Krumme 2003, 2004; Horst 2010), particularly in connection with pendular migration in retirement age. Most of these studies were based on qualitative research. Quantitative studies (secondary data analyses) tend to cover the field of marriage migration (e.g., Kalter and Schroedter 2010).

Compared with other studies of migration research and transnationalism, the design of our pilot study provides a deeper insight into the transnational social practices of individuals in the

social areas of health, education, politics, and the labor market. For the pilot study, we conducted an extensive literature search and subsequent analysis and evaluation of the researched literature on the transnationality of Turkish migrants in Germany. Empirical studies on this subject were identified in various fields of research: marriage/family (Straßburger 2004; Şenyürekli and Detzner 2008), identity and culture (Diehl and Blohm 2008), return migration and circular migration (Krumme 2003, 2004; Razum et al. 2005), economic transnationalism (Rieple 2000), political transnationalism (Ögelman 2003), transnational religious issues (Sökefeld 2008), and hometown associations (Christiansen 2008). These studies are only some examples drawn from the vast literature dealing with the topics mentioned above. For our own pilot study, we were able to excerpt validated items from international transnationality studies such as the MMP, CIEP, and Migration between Africa and Europe (MAFE). After discussing possible transnationality items in many project meetings, we chose 136 items to be included in the final questionnaire for the pilot study.

1.3 Identification of Transnational Items and Their Use in Project C1

To operationalize ‘transnationality’ as a marker of difference (Faist 2015) several steps are undertaken. The items for the C1 proposal that had been gathered were verified, supplemented, and discussed. In this step, we arranged all transnationality items of previously conducted international research projects (CIEP, MMP, MAFE, Survey Transnationalisation). In addition, sociodemographic variables that had already been validated in the SOEP and the Mikrozensus (Statistisches Bundesamt) were taken into account.

SOEP Transnationality Items

The SOEP is a wide-ranging representative longitudinal study of private households. It is located at the German Institute for Economic Research, DIW Berlin. The Panel of SOEP was created in 1984. Every year, more than 20,000 individuals were interviewed. The SOEP data provide information on all household members, consisting of Germans living in the new German states, migrants, and recent immigrants to Germany, and also information about those of their children who are living in the same household. Some of the main topics include indicators about household composition, occupational biographies, employment, earnings, health, and satisfaction (Wagner et al. 2007).

One of the important features of the SOEP is the oversampling of migrants, especially of two immigrant groups: those households whose head is from Italy, Greece, Spain, former Yugoslavia, or Turkey, which covers the ‘guest workers’ (*Gastarbeiter*) and their family

members; and those households in which at least one household member had moved from abroad to West Germany after 1984, which covers to a wide extent the ‘ethnic Germans’ (*Aussiedler*) (Sander 2008: 6). The latter group has been oversampled since 1994/1995. Other categories of migrants are underrepresented.

Depending on the main research question of the pilot project, various dimensions need to be considered to capture transnationality. The operationalization of transnationality may include items such as transnational financial exchanges, personal relationships, transnational cultural identification, and also cultural practices in domains such as politics, the labor market, health, and education. In most of the quantitative studies conducted so far, transnationality has not been adequately disaggregated to take account of the fact that the social areas of labor, education, politics, religion, and so on function according to their own logic and may involve very different kinds of transnationality (Faist 2014: 10). In other words, individuals can be transnational in different dimensions and to different degrees, while some are not transnational at all.

As a first step in the reanalysis of the SOEP data, the questionnaires were screened for items that captured the transnational practices of the respondents. Several items were found in the waves 2006 through 2010 which describe different transnational practices of migrants and non-migrants.

Table 2. Transnational items based on the current year, SOEP 2006 through 2010

Dimension of transnationality	Proxy variables for transnationality	Survey year
Financial exchanges	Sends money or goods to country of origin (yes/no)	2010
Personal relationships	Maintains regular contact to friends abroad	2009
	Has close family members or relatives abroad	2006
	Is related to relatives abroad and to relatives in Germany	2006
	Has visited his/her home country within the last two years	2010
Cultural identification	Feels attached to the country of origin	2010
Cultural practices	Stays abroad for more than three months (non-migrants)	2009
	Reads newspapers in the mother tongue	2010
	Uses the mother tongue and is skilled in its use	2010

The following variables (including further characteristics of heterogeneity) were selected for the reanalysis of the SOEP data:

- Country of origin (place of birth, country of birth)
- Migration history (age when immigrating, length of stay in host country)
- Gender
- Variables measuring transnationality
- Education
- Income (individual and household)
- Labor market position
- Discrimination

- Health situation
- Political participation/interest.

In the meantime, the reanalysis of the SOEP data was conducted, and the bivariate and multivariate reanalysis was documented in the form of an extensive internal report (Voigtländer and Tuncer 2012).

The aim of the reanalysis was to gain an overview of the distribution of the transnational characteristics within the adult population in Germany. Apart from the purely descriptive analysis of these features with respect to their distribution, independent characteristics such as age, gender, country of birth, and social status were analyzed. The analyses focused not only on the individual level but also on the household level (e.g., household net income). Another objective of the reanalysis was to describe the interdependence of transnational (sub-) characteristics.

The descriptive analysis of the SOEP data showed the following: Certain characteristic values of transnationality were very common, such as regular contact with friends and acquaintances abroad, and, depending on the group of migrants, visiting the country of origin. Other characteristic values were very rare, for example receipt of payments from abroad.

The bivariate analyses showed differences in the transnational (sub-) characteristics. Visits or sending remittances or goods to the country of origin differed significantly depending on the migrant's country of origin. For example, among migrants from Asian countries, there was a higher proportion of payments abroad and at the same time a lower proportion of visits to the country of origin. Some of the transnational (sub-) characteristics showed a positive social gradient, such as for payments abroad. The correlation analysis of transnational items revealed a relationship between the following dimensions of transnationality (see Table 2):

- (1) financial exchanges and personal relationships;
- (2) cultural identification and personal relationships;
- (3) cultural practices and personal relationships.

The strongest relationships were found between the dimension personal relationships and the other three dimensions (financial exchanges, cultural identification, cultural practices) but not between any of these other three dimensions. Therefore, transnational personal relationships appear to be the unifying element, with personal relationships being a prerequisite or consequence of the other dimensions. There is some indication that preliminary multiple logistic regression models support this interpretation.

In addition to identifying correlations among the dimensions of transnationality, regression analyses confirm statistically significant country of origin-specific differences in all the subgroups studied, particularly between German-born and foreign-born individuals. This finding is obvious, since in many cases migration has triggered transnational practices and cross-border relationships. Cross-border personal relationships are more common for individuals from Turkey, former Yugoslavia, and the other former 'guest worker' countries than for individuals from Poland and other Eastern European countries.

1.4 Development of the Questionnaire

For the implementation of a mixed-method design for the project (combining qualitative and quantitative parts), as well as for developing the questionnaires and guidelines for interviewing, an initial search for projects and of the methodological literature was carried out, and the qualitative interviews were then conducted. Experience with interviewing and the interview results were then used to support the development of the quantitative questionnaire.

The development of the questionnaire for the panel study involved the creation of an extensive list of about 200 potential questions for the pilot study. One part of the questionnaire (including response categories) was drawn from a variety of international studies (e.g., MAFE, CIEP) and the national SOEP. Some of the questions were adopted unchanged; others were revised or extended. Another part of the questionnaire resulted from an extensive literature search as well as from internal discussions. Questions were assigned to one of the four dimensions of inequality: education, the labor market, politics, and health.

The questionnaire was revised within the team several times before it was tested in the field. Some questions were modified and others were omitted. The structure of the questionnaire - that is, the sequence of the four dimensions and the sequence of questions within each dimension - was specified. The socio-demographic and transnational variables were also thematically sorted and placed in a certain order.

Every modification of the questionnaire was documented. Thereafter, some test interviews were conducted with friends, following which they were asked about the clarity of the questions and their subjective judgment regarding the time necessary for the interview.

The final questionnaire was translated by an interpreter who was a native Turkish speaker. To see whether the translation from German into Turkish was correctly done, the Turkish version of the questionnaire was retranslated into the German language by another interpreter. With this approach, the questionnaire could be validated in both languages.

The questionnaire versions in the German and Turkish language could be used for the survey of Turks in Germany. The Turkish version of the questionnaire for the sub-study in Turkey was modified. This was necessary because spoken and written Turkish in Germany is not the same as the Turkish used in Turkey (Brzoska 2013). This language-modified questionnaire was used to interview the significant others of the respondents in Germany who are living in Turkey. Respondents in Turkey, the significant others, were recruited with the help of those interviewed in Germany. Overall, our partner, Middle East Technical University (METU), received 16 contacts, out of which 13 individuals agreed to participate in our study. This part of the pilot study was conducted by METU in May 2014.

The final questionnaire is available in both German and Turkish for interviews with Turkish migrants in Germany. An adapted version in German is available for interviews with German retirees in Turkey, and an adapted Turkish version can be used to interview relatives and friends of Turkish migrants living in Turkey. Questionnaires are available as computer-assisted personal interviews (CAPI) and are also printed on paper. The CAPI were created using Epi Info 7.

Filtering procedures were programmed and, depending on the answer given by the participant, all other specified response options were blocked to prevent the checking of another response field by mistake. Both procedures were programmed using the check code editor of Epi Info 7.

1.5 Pretest

A pretest with eight participants was conducted to test the functionality of the CAPI input masks and the underlying filtering procedures, and to determine the length of the interviews. The pretest phase led to several changes: the questionnaire was expanded to include six new items relating to the transnational activities, occupational status, and country of birth of the respondents' parents. Also, some redundant items were omitted; response scales such as 'don't know' and 'prefer not to answer' were added to almost every item; and a few errors in the filtering procedures had to be corrected. The final questionnaire consists of 136 questions.

1.6 Study Population (Turkish Migrants in Germany)

The study population consisted of first- and second-generation individuals of Turkish origin (including Kurdish, Armenian, and Zaza people from Turkey) living in Bielefeld, Hamm, Dortmund, and the surrounding areas. The aim was to interview two or three individuals per household and to obtain the addresses of important relatives or friends living in Turkey. The

only exclusion criterion applied to the study was that the participant had to be 18 years of age or older.

1.7 Fieldwork

We conducted a total of 200 CAPI (see Table 3), 175 of which were conducted from November 2013 through January 2014 by five bilingual researchers (Turkish and German) in Bielefeld, Hamm, Dortmund, and the surrounding areas; 25 additional interviews were conducted in Bielefeld, so the data collection of Phase I was completed by the end of May 2014.

Table 3. Gender distribution of CAPI

Gender	Number	Percentage
Male	82	41
Female	116	58
Missing values	2	1
Total	200	100

For this fieldwork two approaches were used to gain access to the field: (1) through Turkish migrant organizations and (2) through a snowball method that started with personal contacts within the interviewers' networks.

(1) Field Access Through Turkish Migrant Organizations

The initial contact with potential interviewees in Bielefeld was realized via organizations such as sports clubs and cultural and religious associations of migrants of Turkish origin. All known Turkish organizations and associations - including Kurdish organizations with members originating from Turkey - in Bielefeld and surrounding areas were informed about the pilot study via e-mail and mail. The organizations were contacted twice over a period of two weeks. During the field phase, only three of the organizations replied, and meetings were scheduled. Their low willingness to participate in the pilot study may be due to limited time and staff because almost all board members of migrant organizations work as volunteers.

Although many members were present when the study was presented to the three organizations, only 15 could be convinced to participate in the survey. However, more interviewees were finally recruited using the snowball sampling.

(2) Field Access Through Personal Contacts of the Interviewers

Since the field access through the migrant organizations was not as effective as expected in terms of recruiting study participants, further recruitment was carried out with the help of the interviewers' social networks. Thus, the interviewers were able to recruit family members, friends, and acquaintances in Bielefeld, Hamm, Dortmund, and the surrounding areas. Even in this case, a certain degree of diversity within the sample was obtained because snowball sampling extended recruitment to a variety of different social networks. Some of these contacts were also obtained through affiliated associations of the interviewers.

(3) The Interview Process

Before the interview, every participant was informed about the content of the pilot study and the subsequent interview process and signed informed-consent forms. As mentioned above, all interviews were conducted using face-to-face CAPI. All interviewers were equipped with an encrypted notebook to prevent a third party from accessing the data in case of loss or theft. Fortunately, no losses or thefts occurred during the field phase. Meanwhile, all collected data were stored on a secure external hard drive. After the successful completion of each interview, respondents were asked whether they would be willing to participate in a follow-up survey. Those who agreed to participate were asked to provide their contact information (address and telephone number). This personal information was kept separate from the interviews and could therefore be used should the project be continued. Finally, the interviewees were asked to provide the names of potential contacts in Turkey who might be willing to participate in the pilot study.

(4) Difficulties in Recruiting Transnational Contacts in Turkey

Within the context of the 200 conducted interviews, only 18 transnational contacts could be obtained through the interviewees. Possible reasons for this general unwillingness to name transnational contacts are as follows: One important explanation for the reluctance to name contacts might be the duration of the interview and the broad range of subject areas covered. Moreover, interviewees were skeptical about the anonymization of personal data. Some of the

interviewees also stated that they had no intensive or regular contacts in Turkey, and they did not want to provide the addresses of more casual contacts. Another important hurdle was that interviewees had to consider carefully which of their contacts in Turkey they should suggest for an interview. If an eligible contact was named, the interviewees had to contact that individual via e-mail or telephone and ask them to participate. Because interviewees were not always able to inform the contacts about the contents of the questionnaire, some of the contacts did not fully understand the intent and purpose of the pilot study and refused to consent to an interview. Others had no interest in participating.

It is important to note that realized contacts were either family members/relatives or friends. If this approach is to be used again in the future, the target population should be more precisely defined. It should be clear whether the researchers include close relatives in the definition of the target population or whether they would rather focus on the regular and intensive contacts with any individuals living abroad.

1.8 Study Population (Significant Others)

At the end of each interview with a Turkish interviewee in Germany, the interviewees were asked if they knew someone, especially a close relative (significant other) who might be willing to participate in our pilot study. Some of them reported no immediate relatives as contacts but rather long-time friends who were living in Turkey. Of those contacts interviewed in Turkey, not all were significant others in the strict sense but close friends and acquaintances of the Turkish interviewees in Germany. The study population consisted of 13 significant others, all of whom were living in Turkey. Most often these interviewed individuals were family members or relatives of the Turkish migrants interviewed in Germany.

1.9 Fieldwork

Computer-assisted telephone interviews (CATI) with significant others were conducted by our partners at METU in May 2014. We were able to interview 13 of 18 transnational contacts (see Table 4).

Table 4. Gender distribution of CATI

Gender	Number	Percentage
Male	7	53.8
Female	5	38.5
Missing values	1	7.7
Total	13	100.0

When using the questionnaire, our partner, METU, raised the following points. Nearly all interviewees had reservations about answering questions on specific topics. Questions about membership in organizations such as labor unions, religious organizations, and political parties were viewed very skeptically by many respondents and were consequently not answered in all cases. Some questions were linguistically and semantically confusing, and in some cases, respondents did not understand the context-specific meaning of certain words. Other respondents regarded certain words as old-fashioned or obsolete in the Turkish language as a result of the diverging development of the Turkish language as used in Turkey and in Germany.

1.10 Study Population (German Migrants in Turkey)

The study population consisted of 35 Germans living in Turkey (see Table 5). CAPI was used for all interviews, which were conducted in the southern Turkish city of Alanya and in its surrounding districts Avsallar and Damlataş.

1.11 Fieldwork

The interviews were carried out by two German-speaking interviewers during field research that lasted nearly three weeks during March 2014. All the interviewees were found through snowball sampling. In part, recruits were sought at focal points such as a German parish and German pubs and at two German-language journals. Another source was a German entrepreneur who led us to a German real estate agent who provided telephone numbers of quite a few Germans living in Alanya.

Table 5. Gender distribution of German migrants in Turkey

Gender	Number	Percentage
Male	12	34.3
Female	23	65.7
Missing values	-	-
Total	35	100.0

Overall, field access to the German community in and around Alanya proved to be relatively easy. As with the Turkish migrants in Germany, it was difficult to obtain transnational contacts through the German respondents. Although one German respondent provided the telephone number of a son living in Germany, all the other respondents did not consider it safe to provide information about their significant others in Germany.

1.12 Data Protection

The Ethics Commission of the Faculty of Sociology approved the study. Before taking part in the study, all participants were informed about the aim of the study, the voluntary nature of participation, and the confidential treatment of the data collected, and all gave written informed consent.

To ensure that the data would be protected, the hard drives of the interviewers' laptops were encrypted using TrueCrypt and were password-protected. Participants' names, addresses, and dates of birth were not recorded; instead, consecutive IDs and year of birth were used.

After all the interviews were completed, the data were copied on to a computer with an encrypted hard drive that was not connected to the intranet or the Internet. Immediately thereafter, the data were deleted from the hard drives of the laptops and from the USB flash drive used to transfer the data. Names and addresses of interviewees and contacts in Turkey were separately documented on paper. The arrangements for data protection are in compliance with the applicable guidelines of the Collaborative Research Center 882.

1.13 Data Preparation

Epi Info 7 files were converted to Microsoft Excel format. Epi Info 7 uses an Access database. Because Access data tables are restricted to 256 variables, CAPI data from every interviewer

had to be exported to four Excel files. The Excel files were then imported to the statistical software SAS. In a second step, data from the four files were merged using either the personal identity number or the global record ID generated by Epi Info. Data from the interviewers were then colluded. Variables were formatted and labels were assigned to variables and values. The plausibility of the data and accuracy of filtering procedures programed in SAS were checked. Three types of missing data were defined: 1) unavailable, 2) question could not be answered due to filtering procedures, or 3) question was not available in the (former) version of the questionnaire. This approach allowed us to calculate the actual nonresponse rates.

In a last step, answers in plain text were numerically coded and labeled using general terms. After being prepared (including variable and value labels), the data were exported to the statistical software Stata. Data analyses could then be performed using the statistical-software packages SAS and Stata.

2 Methods

For this report, only few base characteristics were reported. The descriptive analyses (restricted to analyses of frequency distributions) were performed using SAS.

3 Results

3.1 Turkish Migrants Interviewed in Germany

A total of 200 participants living in 146 households in Bielefeld, Hamm, Dortmund, and surrounding areas took part in the study (see Table 6). In 10 of the households, 3 individuals were interviewed; in 34 of the households, 2 individuals were interviewed; and in the remaining 102 households, 1 individual was willing to participate.

Participants were between 18 and 78 years of age; 41.4% were male and 58.6% female. About half the interviewees were born in Turkey ($n = 98$, 49.8%) or other countries ($n = 3$, 1.5%), and a slightly smaller number were born in Germany ($n = 96$, 48.7%). Of these 96 participants, 3 had re-immigrated at ages 10, 19, and 21, respectively. For 3 of the participants, no information was available.

Participants born in Turkey or another country and the three re-immigrated participants born in Germany were defined as first-generation migrants. Participants who had been living in Germany since their birth were considered to be second-generation persons.

According to their own statements, 41.4% of first-generation migrants (total n = 87) but 88.9% of second-generation migrants (total n = 9) had a high school/university degree (data not shown in the table). It should be noted that 104 participants (52.0%) did not answer the question concerning their highest level of schooling.

In some cases, not all members of a family - that is, two or three interviewees in a household - ranked their household income in the same category. However, a difference of more than one category could not be found. On average, second-generation migrants have higher household incomes - defined as greater than €2,500 - than first-generation migrants (36.0% and 26.3%, respectively) (not shown in Table 6).

Table 6. Socio-demographic characteristics of Turkish migrants interviewed in Germany

	Male*	Female*	All participants*	Missing values
Number				2 (1.0%)
Absolute (%)	82 (1.4)	116 (58.6)	198 (100.0)	
Age				2 (1.1%)
Range (years)	22–73	18–78	18–78	
Mean (STD)	36.8 (11.5)	37.9 (14.1)	37.4 (13.1)	
Status of migration				2 (1.1)
Not living in Germany since birth (first generation)	40 (49.4%)	61 (52.6%)	101 (51.3%)	
Living in Germany since birth (second generation)	41 (50.6%)	55 (47.4%)	96 (48.7%)	
Marital status				5 (2.5%)
Married, living with spouse	47 (58.0%)	63 (55.3%)	110 (56.4%)	
Other marital status	31 (42.0%)	51(44.7%)	85 (43.6%)	
Highest level of schooling				104 (52.0%)
Primary school/none	4 (8.9%)	27 (52.9%)	31 (32.3%)	
Secondary school	14 (31.1%)	7 (13.7%)	21 (21.9%)	
High school/university	27 (60.0%)	17 (33.3%)	44 (45.8%)	
Household income				25 (14.3%)
< €750			18 (10.4%)	
€750–1,500	25 (35.7%)	37 (35.9%)	44 (25.4%)	
€1,500–2,500	23 (32.9%)	36 (35.0%)	59 (35.0%)	
€2,500–4,000	22 (31.4%)	30 (29.1%)	43 (24.9%)	
> €4,000			9 (5.2%)	
* Without missing values				

3.2 The Significant Others

During May 2014, our partner, METU, interviewed 13 Turkish citizens living in 12 households. Of these, 7 (58.3%) were male and 5 (41.7%) were female (one statistic missing).

Participants were 21 to 60 years of age (mean = 40.2, $s = 11.8$). On average, the male participants were younger (mean = 39.4 years) than the female ones (mean = 41.2 years). 8 participants were married/living with spouse. Most participants reported having received a high school degree ($n = 11$, 91.7%); 1 individual had only primary school education or none (one statistic missing). The income of 10 participants was TRY1,500 or more; 3 participants decided not to provide any information about their income.

3.3 German Migrants Interviewed in Turkey

A total of 35 German migrants living in 32 households were interviewed in Turkey; of these, 12 (34.3%) were male and 23 (65.7%) were female (see Table 7). Participants were 17 to 80 years of age (mean = 55.4 years). On average, the male participants were older (mean = 59.6 years) than the female ones (mean = 53.2 years). The majority of participants were married and living with a spouse (57.1%). About 46% had a high school or university degree. One third of the interviewees had an income of less than €750.

Table 7. Socio-demographic characteristics of German migrants interviewed in Turkey

	Male*	Female*	All participants*	Missing values
N				-
Absolute (%)	12 (34.3)	23 (65.7)	35 (100.0)	
Age				-
Range (years)	38–78	17–80	17–80	
Mean (STD)	59.6 (11.6)	53.2 (16.2)	55.4 (14.9)	
Marital status				-
Married, living with spouse	8 (66.7%)	12 (52.2%)	20 (57.1%)	
Other marital status	4 (33.3%)	11 (47.8%)	15 (42.9%)	
Highest level of schooling				-
Primary school/none	6 (50.0%)	13 (56.5%)	20 (54.3%)	
Secondary school				
High school/university	6 (50.0%)	10 (43.5%)	16 (45.7%)	
Household income				12 (34.3%)
< €750			7 (30.4%)	
€750–1500			5 (21.7%)	
> €1500			11 (47.8%)	
* No missing values				

4 Discussion

Pilot study

One of the most important challenges we encountered during the field phase and the implementation of the pilot study was how to develop a survey instrument that could be used in two countries that have serious cultural and especially system-specific differences. In

particular, it was difficult to formulate questions that fit the target groups in both countries. The possible response categories for each variable had to be calibrated in order to yield a dataset in the merging of the partial surveys conducted in Germany and Turkey. Likewise, we noted differences between the Turks in Germany and the Turks in Turkey in their understanding of the questions and of some statements. Although Turks in Germany have access to all sorts of Turkish media and although Turkish is offered as a native supplementary language of instruction in many state schools, we found that the Turks in Turkey reacted more sensitively than the Turks living in Germany to certain questions or statements. Turks in Turkey hesitated or refused to answer many of the questions concerning membership in political organizations or associations, presumably owing to the current political conditions in Turkey. For example, in Turkey the Turkish term ‘*örgüt*’ (organization) tends to be associated with illegal subversive organizations, whereas the same term caused no skepticism for most of the Turkish interviewees in Germany. In addition, certain terms or statements were interpreted or understood differently among the Turks in Turkey, whereas most Turks in Germany responded directly. On the basis of these experiences, cultural and system-specific differences (e.g., in the education system, country-specific retirement system, or health system), as well as the linguistic nuances that may arise after a certain period of time, must be checked and considered during the development of transnational survey instruments.

A large variety of indicators of transnational ties and activities in the areas of health, politics, education, and the labor market allow for a deeper analysis of transnationality as a marker of difference and in connection with other heterogeneities such as age, gender, ethnicity, lifestyle, and competences in the analysis of social inequalities (Diewald and Faist 2011). If such questionnaires are to be used as instruments for longitudinal research, they should help identify changes, over a certain period of time, in the production or reproduction of social inequalities among different social groups or individuals that could be influenced by their transnational ties and activities.

As has already been mentioned, significant others in Turkey were very difficult to recruit. Therefore, a different approach should be chosen for a longitudinal study. Perhaps an extensive survey should be conducted in Turkey with individuals who are not connected with the survey participants in Germany. Based on a propensity score, a nearest-neighbor matching could be performed: individuals surveyed in Turkey who are similar to the specified significant others with respect to selected characteristics will replace these significant others in

analyses. Possible criteria for matching are age, gender, and of course relatives or acquaintances in Germany.

In contrast, the recruitment of Germans in Turkey was relatively easy. Also, it seemed to be easy to recruit more Germans in Turkey. An analysis of the data obtained from the significant others (n = 13) will be restricted to general statements. Because of the paucity of data, further investigations will not be possible. The majority of questions asked were identical in the three surveys (Turks interviewed in Germany, Germans interviewed in Turkey, and Turks interviewed in Turkey). However, not all answers of the different interviewed groups could be compared owing to changes in and adaptations to specific situations (e.g., living conditions, migration status).

Conclusion: Feasibility of a longitudinal study

Based on the experience gained through the pilot study, longitudinal research regarding transnationality and inequalities is, in principle at least, feasible.

First, in planning a longitudinal study, field access must be extended to include several cities and regions in a host country. During the field research we found it difficult to recruit interviewees of Turkish origin within a relatively limited geographic area (Bielefeld, Hamm, Dortmund, and surrounding areas). Although the target population was numerically strong in these regions, recruitment for interviewing posed great challenges. Second, more interviewers must be employed to achieve a certain number of cases, thus enabling generalization of the empirical results. To counteract the problem of panel attrition, the drop-out rate must be kept low through panel maintenance, and the sample selected must be sufficiently large. In addition, for an ambitious long-term study, there must be a solid partner in each country in which the study is not performed directly by the project owners. Our experience with our partners at METU in Turkey was a good one. We were able to rely on a competent team that enriched our study with their sensitivity to cultural issues, as well as with the specific nature of the development of the Turkish language in Turkey, which is not entirely compatible with the Turkish language as spoken in Germany.

On the whole, our experiences during the pilot study provided evidence that a quantitative study applied transnationally to analyze the genesis of social inequalities is feasible. A transnational longitudinal study could help elucidate the dynamics and hidden causes of the production and reproduction of social inequalities. With the adoption of a transnational perspective, a paradigm shift takes place on the empirical level, namely, methodological

nationalism can be abandoned (Amelina et al. 2012; Wimmer and Glick Schiller 2002). Defining transnationality as a heterogeneity feature (Faist 2014) will allow a special focus on different transnational ties and activities of subjects and will verify their relevance to the production and reproduction of social inequalities in a transnational perspective.

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