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From Being the Other to Becoming the Local: Hong Kong's Sociological Exploration

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“Hong Kong is well known as a place; but almost unknown as a society.
It is much publicized, but almost unstudied.”

(Jarvie 1969: xix)

Introduction

When Jarvie, the co-editor of one of the earliest academic title on a sociological and anthropological study of Hong Kong, *Hong Kong: A Society in Transition* (1969), commented on the state of social research on Hong Kong in the 1960s, he made the remark: “In economics, history and geography quite a lot of material already exists. Sociology and anthropology have hardly begun.” (1969: xv; also see the above quotation) Furthermore, Jarvie grumbled:

“Socially and ideologically, then, Hong Kong is all at sea; neither one thing nor the other. Yet for all its being almost a laboratory for the social scientist where he can watch culture contact between East and West, unimpeded economic growth, rapid changes in the social structure approaching breakdown, a morass of changing standards and values, despite all this, almost no sociological studies on the Colony have been published.” (Jarvie 1969: xix)

In other words, despite the fact that Hong Kong itself was an interesting case for us to examine how various social processes were at work in shaping its drastic changes, little attention had been paid by social science researcher to this Colony. Looking back at Jarvie’s remark from our position in the year 2010, we may be surprised to find out how much changes there have been in the past 40 years. Both sociology and anthropology have established their statuses as important disciplines for research as well as teaching (Lee and Lau 1993). Once they have secured their

foothold in local colleges and universities since the late 1960s¹, they grow.

But it is one thing to see the organizational growth of sociology (both in terms of teaching and research) within the establishment of local education institution, it is quite another to say that a local sociology is born. Such an experience of a separation of the organizational building of an academic discipline and the formation of local sociology, with a strong local identity and a developed local agenda, is not peculiar to Hong Kong. Nor is it solely an outcome of Hong Kong's former colonial status². Other Asian sociological communities also have their discussions about the indigenization of sociological theories and concepts developed in the USA, Europe and Britain. This seems to be an issue affecting the development of sociology outside those so-called 'core' countries.

This paper is an attempt to examine the development of sociology in Hong Kong. Particularly, I shall examine how sociology in Hong Kong has been struggling to find its own identity and to develop its local agenda. As stated above, I strongly believe that Hong Kong's experience is by no means peculiar. Our review here will also be relevant to our understanding of the development of sociology in other Asian countries.

Discovering Hong Kong Out of Extrinsic Interests

According to Baker (2007: 10), the first anthropologist arrived at Hong Kong was Barbara Ward and she did so in 1950. She started her work on a fishing village in Sai Kung and looked at people and communities that lived on boats. She was followed by other anthropologists, namely Pratt (on a Hakka village), Osgood (on a semi-urban neighbourhood in Ap Lei Chau Island), Potter (on a lineage village in the New Territories), Freedman (on the rural communities in the New Territories), etc³. Despite variation in their focus of research, most of these researchers did share one common characteristic – they saw Hong Kong, more precisely the New Territories within Hong Kong, as a case for knowing another society, namely China. As noted by Jarvie (1969: xxii), “Most of the scholars who have been to the Colony ... are interested in Hong Kong for extrinsic reason that, in Professor Freedman's words, ‘The New Territories ... have ... the advantage of offering for study perhaps the best living example (however much affected by British rule and modern changes) of traditional Chinese country life.’” In a sense, this focus on China, and not Hong Kong *per se*, had always been the case.

¹ At present, there are only four sociology departments in Hong Kong. They are located in Baptist University, Shue Yan University, The Chinese University of Hong Kong, and University of Hong Kong. But sociologists can be found in multi-disciplinary departments (e.g. applied social studies) in local colleges and universities. Also, many are employed to teach service courses and general education courses.

² Colonialism is, of course, a major factor here. The administrative colonial state in Hong Kong avoided long term planning. The colonial officials expected little input from social science academics and researchers. That the decolonization process was not followed by nation-building efforts, a process described by Lau as ‘decolonization without independence’, also significantly reduced the opportunity of developing applied and policy-related social science research. But this factor alone cannot explain why it takes so long to develop a local sociology.

³ Marjorie Topley was perhaps an exception in the sense she was one of these few early social researchers that had paid a lot of attention to urban life in Hong Kong.

“First and foremost there is of course the quite overwhelming presence of China proper. This has always overshadowed Hong Kong, and does so still. ... Students of China would always prefer to get into China proper, than to study Hong Kong say, or Shanghai. After the virtue closure of China to serious foreign students by the communist authorities, the value of Hong Kong to scholars lay primarily in the opportunities it provided to study the mainland through the medium of refugees and printed materials. ... Scholars wishing to study Chinese traditional society have tended to go to Taiwan.” (Jarvie 1969: xx)

The establishment of the Communist regime in China in 1949 and later the start of the Cold War were critical to the practice of anthropological studies in China. Potter (1968: vii), who carried out his fieldwork in Ping Shan, admitted that:

“In all frankness, this study represents the work of a frustrated anthropologist who would have preferred to write a book based on first-hand investigation of a Chinese commune. But given the present political situation, the New Territories were a close to China as I could get. ... Like other students of China, I hope that conditions will someday improve to the point that we can cease studying communes through refugee interviews or by peering at them through binoculars across the Sham Chun river.”

Moreover, Potter was well aware of the limitations of such a way of studying China through Hong Kong or Taiwan:

“One of the main objections to this book and to all such studies of Chinese society on Taiwan or in Hong Kong will be that these places are not China and have little relevance for the understanding of either traditional or modern Chinese society. I am fully aware, almost painfully so, that the New Territories are not China.”

That said, under the political condition of the Cold War and the political seclusion of China from the non-Soviet world, there was little option available to field researchers of China studies. Given their interest and focus on China, it was quite obvious why they all turned to the New Territories in Hong Kong for conducting their fieldwork. Rural villages there, as noted by Freedman above, were substitutes of traditional Chinese communities⁴. In this connection, the cases found in Hong Kong offered an additional advantage to the researchers. That is, the New Territories were under the influence of modernization and urbanization, and this gave the researchers an opportunity to examine how these macro social processes would shape the course of social change in traditional communities⁵.

⁴ The underlying assumption of the existence of some kind of Chinese-ness (or essential characteristics of being Chinese) in all Chinese communities was rarely challenged at that time.

⁵ Equally important was that Hong Kong was the place wherein researchers could find refugee informants for asking information on changes in China since 1949. This had been the most commonly accepted strategy for information gathering for research projects on contemporary China until the gradual opening of China for social research.

What is most relevant to our discussion here is that in the early development of anthropological and sociological studies of Hong Kong, researchers' focus was often placed not on Hong Kong society. Rather these researchers were more inclined to see (rural) Hong Kong as a substitute of traditional Chinese society. They came to Hong Kong not out of an interest in Hong Kong *per se* but rather that of a curiosity about somewhere else. Should they not be deterred by political events from visiting China in person, they were unlikely to have chosen Hong Kong as their site of fieldwork. Hong Kong society itself was irrelevant. They discovered Hong Kong out of extrinsic interests.

The Modernization Perspective: Another Case for Proving the Universal

When sociological studies of Hong Kong began to take off in the late 1960s, researchers continued to get curious about Hong Kong society for reasons other than an intrinsic interest in the local community itself. Some of them found Hong Kong relevant because it was a modernizing and urbanizing colony that would allow them to assess the impacts of industrialization and urbanization on social institutions. Family studies carried out in that period of time were particularly indicative of such an orientation. As put by Hong (1970: 2-3) in his study of the changing structure and functions of Chinese families:

“Hong Kong was chosen for this study because it is the most industrialized Chinese society at the present time. ... In this study both industrialization and westernization are regarded as major factors that could affect the family in Hong Kong.”

The basic assumption of such an approach was that Chinese families, being exemplars of the traditional (pre-industrial) family, in Hong Kong were exposed to the major challenges brought about by the processes of modernization, industrialization, urbanization, and the so-called Westernization. A study of Hong Kong's families would allow the researcher to identify the impacts of such processes of social change and to see how the traditional family has been modernized.

The same kind of underlying concern could be found in community studies in the late 1960s and early 1970s. C.K. Yang, the senior member of a research team on the growing industrial satellite town, recalled:

“In 1969, I took a group of sociology colleagues up the Black Hill for a panoramic view of Kwun Tong, a new satellite of about one-half million population which had risen with high speed from an unpopulated trash dump, in less than 15 years. The view was sociologically exciting, with all the ecological components plainly displayed like a toy city under our feet. The size seemed manageable for a field study of a Hong Kong satellite.” (Yang 1981: xii)

And then, he elaborated:

“The transformation of Hong Kong from a quiet, relatively homogeneous colonial city to a bustling and heterogeneous metropolitan community follows an ecological pattern with considerable universal features in common with metropolitan

communities elsewhere in the industrial world.” (Yang 1981: xvi)

His emphasis on social changes and development which could be universally identified in all industrializing (and industrialized) societies was telling. He saw the relevance of Hong Kong, a Chinese society undergoing the social processes of industrialization and urbanization, primarily in terms of its significance of verifying and reformulating Western theories. To be fair, we have to admit that he did not see this as a one-way dialogue. In his own words, the purpose of conducting social research in Hong Kong was to “acclimatize social science to the Oriental soil”.

“Modern social science faces the problem of universal, cross-cultural validity, for it draws its theoretical conclusion from data in culture-bound facts. The validity of Western social science theories and the use of Western texts in social science education in Oriental societies demands research, verification and reformulation in the light of the native environment. The Social Science Research Centre was established primarily with this goal in view – to acclimatize social science to the Oriental soil.” (Yang 1981: xxv)

Yet, that said, working largely within the framework of modernization, his understanding was premised upon a recognition of “the influence of universal trend”. In short, Hong Kong was largely a laboratory for examining the impacts of industrialization and urbanization on societies that were going through modernization.

“The prevalence of nuclear families, the trend toward an egalitarian family structure, and the distinct preference for smaller-size families, are reversing some of the central features of the traditional Chinese family ideals which once accounted for many of the fundamental characteristics of traditional Chinese society. Save for the encouragement of family planning, these developments have not been the result of policy encouragement from the British colonial government, but rather the product of impersonal forces generated by the development of industrialization and urbanization of the metropolitan community of Hong Kong. It is notable that the prevalence of nuclear families, the egalitarian trend of intra-family relationship pattern, and the reduced size of families, have been a general common feature in metropolitan communities in the industrialization world, and their prevalence in Hong Kong shows the influence of thus universal trend, regardless of the ideological intentions of the colonial policies.” (Yang 1981: xxiii)

The modernization perspective gave local sociological studies a benchmark and a handle. Development in the locality was basically measured against the constructed type of a modern society (primarily in the image of the USA and/or the UK). Furthermore, modernization was seen as the major driving force that shaped the course of development of the concerned society. This perspective was teleological, assuming all societies would move towards the same destination of becoming a modern society. In this connection, the local would be interesting only if it helped demonstrate the value and significance of this macro perspective. Its conformity to the universal trend was expected. If not, it was largely an outcome of some kind of time and/or cultural lag. It would only be a matter of time that it would catch up. In the modernization perspective, the significance of the local was only secondary.

The Beginning of a Two-way Dialogue

The erosion of the hegemonic status of the modernization perspective since the late 1970s and the 1980s was critical to the development of a two-way dialogue between the local and social theory in general. This coincided with a major economic restructuring in the core countries after the Oil Crisis in the early 1970s and rapid economic growth in East Asia. The rise of Japan as an economic giant posed serious challenge to the established explanation of how the developing economies could catch up with the industrialized core. The economic success of the so-called Asia's Four Little Dragons further reinforced the call for serious rethinking of the modernization perspective.

In the case of the development of Hong Kong's sociological studies, three major changes had been important in structuring a new research agenda. First, it was the introduction of a gender perspective to the study of the Chinese family. The milestone here was Janet Salaff's research (1981) on the working daughters of Hong Kong. Salaff conducted ethnographic interviews with the working daughters who started their working careers early and contributed to the family economy. However, their economic independence did not automatically bring about a significant enhancement of their status in the family. Indeed, it was the established gender norms, gendered division of labour and family obligations that pushed these young women towards giving up education prematurely for the purpose of supporting their families (especially the education of their siblings). Salaff described such a form of family politics as the centripetal family. By highlighting the subordination of the interests of the daughters' to those of the family's (as defined by the father), Salaff challenged the rather simplistic analysis of changes in the family according to modernization theory. By rejecting the claims (e.g., some universal trends towards greater independence among women) made by the modernization perspective, Salaff alerted us of the need to look at the local from a different angle. That the situation being different from the prescription put forward by the modernization perspective was an issue that merited serious attention.

Second, the economic success of East Asian economies called for alternative thinking about economic development. Largely a result of their phenomenal economic growth and development, there witnessed a proliferation of new perspectives for analyzing why these Asian economies had been so successful. Modernization theory was quickly replaced by the emergence of the Weberian problematic. Whereas traditional (and Chinese) culture was once condemned as an obstacle to rationalization and economic development, in the 1980s we saw growing interests in unraveling the secrets of economic success in East Asia in the light of its culture(s). Concomitantly, there also witnessed the rapid development of various perspectives for understanding East Asian development (e.g., the developmental state thesis). Particularly important was a growing concern of the organizational foundation of the successful enterprises and industries within the region. Siu-lun Wong's studies of Chinese entrepreneurship, Chinese economic culture, and the Chinese firm (1985, 1986, 1988) prepared for a new research agenda for developing an economic sociology in Hong Kong.

Third, for a long time, the political stability of Hong Kong society was seen as an intriguing phenomenon. It was a colony (and thus vulnerable to political contention) and had been undergoing rapid economic and social changes. Both of these factors had been accountable

for political turmoil and transformation in a lot of developing countries. That Hong Kong stayed stable and the colonial rule was rarely challenged by anti-colonial social forces required a sociological explanation. Siu-kai Lau's (1982) systematic analysis of the major characteristics of Hong Kong's polity and society was innovative in the sense that instead of asking for a dialogue with the established theories, he confronted the local literature and explained why his structural analysis would be a major advance towards understanding Hong Kong's political stability.

All in all, both changes in the macro environment (socio-economic as well as intellectual) and a recognition of the significance of the local were critical to the gradual formation of a local research agenda and sociological studies with a nascent local identity.

The Formation of a Local Agenda

Hong Kong in the 1980s was quickly overwhelmed by the question of decolonization and its return to China (and thus triggering off a process of political transition). Hong Kong's peculiar political position posed serious challenges to established understanding of political change. First of all, it was exceptional in the sense that the handover would be a process of 'decolonization without independence' (Lau 1990). Hong Kong's political transition, in the form of partial democratization, could not be understood simply in terms of a democratic transition. The constraints of Hong Kong's political reform imposed by China were real and determinant. Second, Hong Kong's partial democratization brought about various outcomes (e.g., the underdevelopment of party politics) that were very different from the course of political development in developing and/or democratizing countries. Third, the post-1997 framework was largely a consequence of political compromise among China, Britain, and the vested interests in Hong Kong. It was characterized by two overarching themes, namely prosperity and stability. Such a political design constituted institutional constraints of further democratization in Hong Kong. The rapid development of political sociology in Hong Kong could be seen as a response to the challenge posed by this peculiar process of political transition.

A growing sense of political uncertainty brought about by the 1997 question was one of the key factors that structure Hong Kong people's identity. Hong Kong was a migrant society. The immigrants coming to Hong Kong in the early post-war decades tried to stay away from the political turmoil in the Mainland. However, at the same time, they had difficulties in adjusting to the socio-economic environment of the colony. For a long time they saw themselves as sojourners, never having a plan to stay in Hong Kong for good. Their children, essentially grew up in Hong Kong, tended to adopt a different approach to their life in the local community. By the time they developed a local identity, they had to encounter Hong Kong's fragile political status. The 1997 question set the scene for an exploration of how a local culture and a local identity were formed in the early post-war decades. It also posed serious questions to academic researchers about how to characterize and to make sense of Hong Kong's local culture, identity and sense of belonging. This growing literature on Hong Kong identity was synthesized by Mathews, Ma and Lui (2008). They argued that Hong Kong constituted an interested case for our understanding of national identity in a globalizing and post-national environment. Hong Kong society had gone through a process of finding and developing its own identity, and then had to face the challenge of locating itself in a nation (namely, China). Instead of seeing Hong Kong a case of anomaly, they argue that in a globalizing and post-national world, perhaps more and more societies would find Hong Kong's experience relevant.

After 1997, Hong Kong encountered the Asian Financial Crisis, the SARS attack, and the Financial Tsunami. It was also a period of time wherein the Mainland had shaken off its socialist past and became an economic powerhouse. Such development brought about a major turnaround, with China becoming stronger and stronger and Hong Kong struggling with its own survival. Post-1997 social and economic development was very different from the projection made in the 1980s. Hong Kong was increasingly restructured by the dynamics of regional integration. How would Hong Kong reposition itself in this changing regional and national context had no easy answer (Chiu and Lui 2009).

In brief, the peculiar course of social, economic, cultural and political change in Hong Kong urged local sociologists to work on a research agenda that would help them deal with these emerging issues in post-1997 Hong Kong. While theories, perspectives, and concepts borrowed from the global sociological literature were found relevant, the way they were applied and made use of had to be locally pertinent.

Future Challenges

The building of a sociological literature with a local identity and a local agenda would not guarantee that this would be further reinforced and strengthened. One of the major challenges to the construction of a local sociology is the changing intellectual environment in local universities. That increasingly universities in East Asia have to compete with others in terms of world ranking drives many universities and research institutes to place much emphasis on international venue of publication and thus the dissemination of ideas and findings in a foreign language (mainly English). How this would shape the practice of local sociology remains an open-ended question. But its impact requires our critical assessment and evaluation.

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