

A LOCALIZED CULTURE OF WELFARE

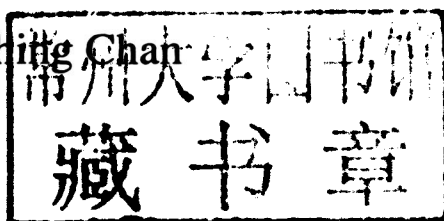


ENTITLEMENTS, STRATIFICATION, AND
IDENTITY IN A CHINESE LINEAGE VILLAGE

KWOK-SHING CHAN

A Localized Culture of Welfare
*Entitlements, Stratification, and Identity
in a Chinese Lineage Village*

Kwok-shing Chan



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A Localized Culture of Welfare

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Note on Romanization

All the local place names in this book are romanized according to the system found in *A Gazetteer of Place Names in Hong Kong, Kowloon and the New Territories* (Hong Kong Government, 1960). Place names outside Hong Kong are in *pinyin*.

Personal names (surname followed by given name—e.g., Pang Si Yan) follow conventional Cantonese romanization. All personal names in this book are pseudonyms, except those of the villagers (e.g., Pang Kwai) who passed away before the lease of the New Territories in 1898 or who are public figures (e.g., Pang Fu Wah), and those recorded in the government office or documents which could be read by the public. The names of Chinese officials (e.g., Ji Peng Fei) and dynasties (e.g., Song dynasty) all have been written in *pinyin*. Cantonese terms, in italics, are romanized with reference to *A Practical Cantonese-English Dictionary* (Sidney Lau, 1977), with the exception of the terms *tso*, *tong* and *wui* which are commonly adopted by the Hong Kong Government.

A glossary of the Cantonese terms is provided at the end of the book.

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Introduction

Welfare and Security, an Anthropological Perspective

Hong Kong is a modern yet traditional Chinese society. Several days before the lunar New Year, many Chinese families in Hong Kong are busy preparing for celebration. In addition to buying festive foods and new clothes, cleaning up their houses and preparing red packets,¹ they also perform domestic rituals. They decorate their home altar with a new pair of dazzling, eye-catching golden paper flowers and a long, thin strip of red cloth. These golden flowers and red cloth are actually adornments and offerings for ancestors and designated deities. In addition, during the lunar New Year festival, these ancestors and deities will also receive elaborate sacrificial foods and a crop of paper gifts.² By performing this ritual and making such offerings, these families hope to receive religious blessings or spiritual protection in return. They also paste new prints of Door Gods on every door to ward off evil spirits. These annual domestic rituals held during the period of cosmological renewal aim to reinforce the reciprocal linkage between the living, the dead, and their deities, as well as the traditional family value of filial piety.

Pasted alongside the images of Door Gods are the New Year's couplets. These are a pair of counterbalanced phrases written on strips of red paper and hung on the door panels. Though the contents of these couplets are varied, auspicious notions such as health, wealth, longevity, and good luck are the key themes. To complement couplets are diamond-shaped or rectangular red papers called *fai' chun'* (meaning auspicious writings for the Spring Festival). These are usually pasted or hung on the wall in the house to express aspirations for an auspicious future.

These rituals performed before the arrival of the lunar New Year are examples that demonstrate the aspirations for material and spiritual wellbeing of most Hong Kong Chinese. Their persistence in aspiring to them and, more importantly, their efforts to achieve them are worth studying. This is especially true when current literature has suggested that the people of Hong Kong are living on the double edge of insecurity and uncertainty due to rapid socioeconomic and unprecedented political changes in recent decades.

A Society Fraught with Uncertainty and Risk

As a so-called residual welfare state and in the spirit of laissez-faire capitalism [in Aspalter's terms (2002:120)] which Hong Kong embraced, state welfare provision was minimal, and the population had to rely on local social parameters for welfare assistance in times of need. The colonial government had encouraged the traditional Chinese culture of welfare, which was based on self-reliance, family responsibility, community support, an ethic of hard work, and low expectations of

support from the state. In other words, as Ku and Pun (2004) suggest, this ideal citizen-subject emphasis on self-help and mutual help was required to acquire a specific ethic of self: the enterprising individual who is “always on the lookout for resources and new opportunities to enhance their income, power, life chances, and quality of life in order to take advantage of rapid changes in the economy and society” (Ku and Pun 2004:1). Consequently, the notion suggested by Marshall (Marshall and Bottmore 1992) of state-provided welfare assistance as a social right of citizens was remarkably underdeveloped or there was little extension of it (Holliday and Wilding 2003:173; Wilding, Huque, and Tao 1997:19; Lee 1996:27). Therefore, welfare assistance, for the most part, was guaranteed only after means testing, and, more importantly, it was highly stigmatized.

Hong Kong has undergone rapid and substantial social, economic, political and demographic changes since the 1970s. These changes include more women participating in the formal labor markets, increasing rates of divorce, decline of the extended family and kin group, eclipse of communities, decline of traditional family values, rapid ageing of the population, neglect of the aged and children, and emigration of younger people (Chan 2010:89-105; Chan and Wong 2005; Chow 1990; Gibb and Holroyd 1996; Ikels 1983; Jones 1990:173; Leung 1995:368; McLaughlin 1993:128-29; Wilding and Mok 1997:159).

As the convergence theory suggested by Wilensky and Lebeaux (1965) predicts, the above changes are significantly weakening the capacity and willingness of the family, kinship, and community to provide care and support for its needy members due to modernization, industrialization, and capitalism. This is especially so in Hong Kong where there are no retirement pensions, unemployment benefits, or child benefits, and where there is a great shortage of state-provided care services. Therefore, while traditional, local security networks were an important source of care and support in a residual welfare city-state, they were simultaneously facing the pressures of weakening change and heavier responsibilities. A number of studies on the plight of the aged in modern Hong Kong (Chow 1990; Ikels 1983; Gibb and Holroyd 1996) provide illustrative examples. They reveal the economic vulnerability, depressing circumstances, and falling status of senior citizens in contemporary Hong Kong exacerbated by the fact that the government did little to provide welfare benefits to relieve the pressure on the family and community in looking after older members. Also, there was little or insufficient attention given by the government to child care or to those with physical disabilities, mainly because the government had not developed a clear family policy (that is, a policy to provide support for families) (Gibb and Holroyd 1996).

Though Hong Kong was returned to Chinese sovereignty in 1997, the lurking jeopardy resulting from insufficient local welfare provisions and entitlements was not overcome. The new government in post-1997 Hong Kong also distances itself from front-line welfare responsibilities in order to discourage welfare dependency (Chan 2011:149-169). This correlates with the welfare provisions of the sovereign state of Communist China, which continues to promote heavy reliance on the family and local social affiliations and networks for self-reliance and mutual help (Chan and Chow 1992; Chan 1993; Davis-Friedman 1983; Dixon 1981; Leung

and Nann 1995; Wong 1998; Yang 1994). Consequently, Hong Kong people and their families continue to work hard to secure their own well being in a new polity where welfare assistance for needy citizens is limited as it was before reversion.

Another haunting concern closely connected with Hong Kong people's wellbeing and livelihood is the future of Hong Kong after 1997 under Chinese rule. Many studies (Chan 1996; Chiu et al. 1987; Ho and Farmer 1995; Khun 1996; Lam 1995; Lau 1988; Bueno de Mesquita 1996; Salaff and Wong 1995; Skeldon 1991, 1995; Smart 1995) have demonstrated that from the early 1980s to the late 1990s, Hong Kong's return to Chinese suzerainty in 1997 aroused feelings of insecurity and uncertainty about the future among the local populace. Many feared that the free capitalist society of Hong Kong would be put in jeopardy once incorporated under the rule of an autocratic socialist government. In 1995, two years before the handover, the international economic journal *Fortune* used "The Death of Hong Kong" as a cover page title. It seriously questioned the applicability of a "one country (China), two systems (capitalism and socialism)" political framework to post-1997 Hong Kong. Numerous local polls and surveys also indicated that there was much indigenous concern (Khun 1996; Lam 1995; Lau 1988; Skeldon 1995; Smart 1995; Tsang 1997; Wong 1995). They predicted that, after the handover, *on¹ ding⁶ faan⁴ wing⁴* (stability and prosperity) would be squandered and *gong² yan⁴ ji⁶ gong²* (Hong Kong people ruling Hong Kong) denied. This pessimism was further reflected in the fact that many businesses withdrew from Hong Kong in the pre-1997 period and by the flight of capital generally (Chan 1996:191). These factors gave testimony to the lack of confidence in the new Chinese regime's intentions toward Hong Kong.

Sun² sam¹ ngai⁴ gei¹ (crisis of confidence) was a popular and prevalent term articulating Hong Kong people's feelings of insecurity on the eve of reversion. These feelings were intensified by the Chinese government's callous suppression of demonstrations in Beijing's Tiananmen Square in 1989 (Hong Kong Standard 19/12/1989; South China Morning Post 9/12/1989; Tsang 1997:168). There was widespread belief and worry in Hong Kong that freedom, human rights, and democracy could not be guaranteed after 1997. Many perceived that what had happened in Beijing augured the future for Hong Kong after its incorporation under Chinese rule. Consequently, approximately 500,000 Hong Kong people sought a safe haven by migrating to overseas countries, mainly the United States, Australia, and Canada. Most obtained the right of abode overseas through the business migration program (Ho and Farmer 1995; Salaff and Wong 1995; Skeldon 1995; Smart 1995). Some emigrants who were less educated and could not meet the immigration criteria of those foreign countries, emigrated to South Africa, Latin America, or Caribbean countries (Khun 1996:57).

Of the above-mentioned studies, most recorded a crisis of confidence in the future welfare and security of a way of life Hong Kong people had taken for granted as a British colonial outpost. There was palpable fear that the wellbeing of Hong Kong itself would be jeopardized by the 1997 transition. Several months after the handover, there was a major crisis—commonly referred to as the "Asian financial crisis." The serious economic downturn that began in Thailand with the collapse of its currency shattered confidence in the post-1997 Hong Kong

economy. The economies of Hong Kong, South Korea, and Indonesia soon began to feel the effects. The downturn's impacts on Hong Kong include sharp reductions in asset values (down about 60 percent), a dramatic rise in unemployment (close to 7 percent), and a significant decrease in domestic demand (retail sales down 17 percent). The livelihood of Hong Kong people was adversely affected. Moreover, the outbreak of SARS (severe acute respiratory syndrome, a highly infectious disease) in 2003, though lasting only a few months, further undermined the economy and confidence of Hong Kong. Hong Kong's economic recovery was slow. Because of a sharp drop in government revenues from land sales and taxes from stock and property trades, there was a retrenchment in social welfare and services. In short, in the early years following the handover, Hong Kong faced great difficulties, declining optimism about the future and reduced ability to provide adequate social welfare development.

The Aim of this Study

It was reasonable to anticipate that many Hong Kong people might feel anxious and vulnerable about living on the double edged sword of insecurity and uncertainty in the changing context of a colonial and postcolonial regime. But, this prediction has been based largely on urban-based and quantitative or archival research. This volume examines critically the real impact of these events on a specific group of people through an ethnographic case study of a rural community situated at Fanling in Hong Kong's New Territories. It draws on anthropological fieldwork conducted during the late 1990s and the early 2000s.

My findings provide an ethnographic account of the repercussions of those crises for members of this Hong Kong community. They offer, in some respects, an exceptional, local vantage point and specific details of a rural community that cuts against the grain of assumptions and arguments held in much social welfare literature and, particularly, against the anticipated effects as set forth in previous studies. This ethnographic study demonstrates that kinship, particularly agnatic kinship, has remained a valuable resource for villagers, enabling them to acquire key welfare entitlements and to secure a good measure of economic and social wellbeing. This local form of welfare provision and entitlement (which I call a "localized culture of welfare") sheds new light on kinship, welfare, and entitlement studies within anthropological and social policy literature about Hong Kong society. Also, in the following chapters, I would demonstrate that in the colonial and post-colonial Hong Kong context, rural villagers such as the Pangs are treated differently from urban dwellers in terms of citizen entitlement. The Pangs enjoy more privileges and entitlements by virtue of their government-granted indigenous inhabitant status. This means that they have more and definite advantages over other Hong Kong people in terms of welfare and security.

The Study of Chinese Welfare in Anthropology and Social Policy Research: Review and Critique

In Chinese studies, ethnographic writings have paid attention to such issues as kinship, religion, rituals, ethnicity, identity, gender, stratification, inequality, and state and society relationships. This “regional tradition of ethnographic writing,” to use Fardon’s (1990) words, has ignored welfare matters as an explicit concern, and has relatively little to say even implicitly on social welfare issues. In the 1980s, though anthropologists Croll (1987, 1988) and Feuchtwang (1987, 1988), for example, researched social welfare policy percepts and provision in contemporary rural China, their works focused on policy administration and changes and their repercussions, primarily at institutional levels. They did not provide an ethnographic analysis or insight into the experiences of the people studied (from the resident’s point of view or the actor’s perspective) and the strategies they adopted in concrete situations.

Rarely, works such as that of Ikels (1996) and Ku (2003) offered an ethnographical account of the changes brought about by many reforms in post-Maoist China in the material circumstances of life and the overall wellbeing of the local populace, as well as their response to the changing situations. Ikels demonstrated that although there was an improvement in the living standards of urban dwellers in Guangzhou, many of them remained worried. This was not only because increasing disparity in income across different segments of the urban population might eventually generate social discontent, but also because, as Ikels (1996:269) demonstrated, “human feelings and relationships [that] seem to have been replaced by a drive to make money no matter what it takes and no matter how dishonest the means.”

Ku’s (2003) study of a single surname village in rural China demonstrated how the villagers reformulated and reactivated their ancestral hall committee to cope with the decline of the socialist state’s welfare provision in the post-reform era. The ancestral hall committee has played an active and vital role in taking charge of communal affairs and providing care for marginalized or needy groups and public goods for the community. These clearly revealed that agnatic kinship and lineage organization have significantly replaced the major function of the local government in securing the welfare and interests of the local populace. This anthropological study serves as a comparative reference for the present study.

In studying Hong Kong, most anthropological studies have followed the traditions of Chinese ethnographic writings. The ethnographies of Watson (1975) and Ikels (1983) are just a handful of exceptions focusing on specific welfare issues. Watson illustrated that lineage membership and organization was a valuable resource that facilitated villagers of the Man lineage in rural Hong Kong in seeking jobs abroad in the 1950s and 1960s when traditional rice farming became unprofitable and there was a high unemployment rate. Ikels highlighted the limited arrangements that were available in the 1970s and 1980s for elderly Chinese without relatives, and emphasized the importance of relatives in constituting their

first line of defense in a rapidly changing, residual welfare society. Both Watson and Ikels's ethnographic studies showed the salience of attention to welfare concerns, but they were focused on one particular aspect or issue of welfare and security.

After them, it was not until the mid-2000s that an anthropological study appeared that focused on welfare issues in terms of conceptions, meanings, and forms of happiness, wellbeing or life satisfaction, among people of Hong Kong, Japan, and America (Mathews 2006:147–68). Mathews argued that the statistical findings on the subject are broadly accurate or suggestive, but, at a subtler level, “their accuracy is arguable” (147). This is because the conceptions, meanings, and forms of happiness, wellbeing or life satisfaction, vary in different cultural milieu; therefore, local context must be taken into consideration. Mathews (152) suggested “a way to compare individuals and societies, not in terms of happiness, but in terms of ‘that which makes life worth living . . . People’s senses of ‘what makes life worth living are no doubt a key factor in their personal happiness, and by studying these senses we can compare individuals in relation to their social worlds in different societies.’” Mathews’s work indeed offers a new approach to the study of happiness, wellbeing or life satisfaction, but, as a short article, it is inherently inadequate to analyze this subject matter thoroughly in a specific local context.

The extant literature on Chinese welfare (Aspalter 2001; C. Chan 2011; R. Chan 1996, 2002; Davis-Friedman 1983; Dixon 1981; Holliday and Wilding 2003; Wong 1995) pays prime attention to macro-level policy analysis that investigates its rationale and its implementation and results in welfare provision. Hence, research has centered on the role of the state in policymaking and implementation or the variables in shaping this process. This kind of policy-oriented study has paid scant attention to aspects of welfare provision at local or community levels and to the experiences of the people studied in concrete situations.

As for social welfare studies on Hong Kong in particular, in addition to a policy-oriented approach, they have adopted a number of perspectives and analytical frameworks. First, they have primarily looked at those living in urban settings, leaving rural villagers unexamined and implicitly assuming that they are the same as urbanites in pursuit of welfare and security. Second, the studies have suggested and paid much attention to a mainly four-tier structure of pluralistic welfare framework in Hong Kong. This framework assumes the primary significance of the family, market, and charity in providing care and support, with the state being a minimal and residual provider. In highlighting these four mechanisms or channels, which are mainly found in the urban Hong Kong context, the question arises: does the same framework apply to communities in rural areas?

Third, in discussing welfare benefits and provisions in Hong Kong, citizenship rights are also a focus of social welfare research. There are a number of studies looking at public opinion concerning citizen entitlement in the area of social rights³ or at differential treatment given to citizens in terms of class, gender, and ethnicity (CUHK and UHK 2003; Ku et al. 2003; Law and Lee 2006; Lau and Kwan 1988; Leung 1998; Pun and Wu 2004; Sautman 2004; Tam and Yeung 1994; Wong and Wong 2005).⁴ Notably, the status of (welfare) citizenship of

these people under study is in striking contrast to the status of the 700,000 people who are classified by the government as *yuen⁴ gui¹ man⁴* (“indigenous inhabitants”—those whose ancestors settled before the British came to rural Hong Kong in 1898). Indigenous inhabitants are entitled to more social and legal rights under British colonial rule. Nevertheless, the specific configuration and practice of this differentiated citizenship has not been well received according to a current citizenship study that primarily focused on revealing the levels of expectations of social rights among the Hong Kong Chinese.

Fourth, in examining the notion of welfare, the existing literature has mainly been concerned with the provision of financial assistance, social services, and public support by the state or benevolent institutions to persons in need. Little attention has been paid to the satisfaction of psychological or emotional needs or the wellbeing of individuals and the collective, which are called “higher-order needs” in Maslow’s terms.⁵ These needs include the desire for finding and maintaining secure circumstances, stability, and protection; the need for the respect of others, status, and recognition; and a sense of belonging to a group or a community. In other words, the extant study of Hong Kong welfare has adopted a narrow definition of welfare that mainly confines itself to the satisfaction of material or basic needs. I suggest that an examination of the ways and levels of attaining those higher-order needs in fast-changing, modern Hong Kong society is noteworthy. It is especially so when many studies purported to demonstrate that Hong Kong is beset with social problems and crises that seriously dampen those higher-order pursuits. Importantly, these social problems and crises are also to be seen in many western and advanced industrialized societies. They are the eclipse of community; the atrophy or lessened importance of extended family and kinship; alienation (individual’s estrangement from traditional community and others); anomie (individual disorder because society norms are confused, unclear, or not present); disdain for tradition or detraditionalization; the decline of religion and rituals in a disenchanted modern secular world; and identity crisis (e.g., ontological insecurity and a sense of not belonging) (Beck 1992, 2000; Giddens 1990, 1991, 1994; Sennett 2000; Wilensky and Lebeaux 1965).

Fifth, another focus of extant welfare study centers on the determinants of the (under)development of social welfare and services in Hong Kong, particularly under British colonial rule. In addition to political and economic factors or forces, many welfare studies (Chan 1996; Wilding, Huque and Tao 1997; Jones 1990) also either emphasized or paid more attention to cultural values as a significant variable to explain policy development and unique welfare provision methods.⁶ Notably, the extant welfare literature has paid much attention to the prevalence and importance of traditional Confucian values or ethics, which constitute what Pinker (1986) refers to as Hong Kong’s “culture of welfare” in the pursuit and delivery of care and support. It has overlooked what I call a “localized culture of welfare,” another dimension or facet of the culture of welfare in Hong Kong. This culture is developed particularly in some long-established communities that have strong, century-old, local traditions for dealing with entitlement and obligations among members in matters of care and support. Hence, investigation of this localized culture of welfare can provide substantial empirical data on how Confu-