

# Democratising qualitative research methods: Reflections on Hong Kong, Taiwan and China



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## The great invitation

It was a great honour to be invited to review the June 2017 special issue of *Qualitative Research* examining democratic research practices. As social work scholars focusing on issues of gender, sexuality and intimacy, we have long been interested in how power and hierarchy in knowledge production serve to marginalise service users, practitioners and research participants. Here, we draw on our personal experience to consider what is at stake in attempting to democratise qualitative research methodologies in Hong Kong and Taiwan. The special issue usefully categorises participatory qualitative studies into five approaches: ‘transformative’, ‘inclusive’, ‘co-produced’, ‘indigenous’ and ‘care’ful’ (feminist) research. This categorisation serves as a good starting point for examining the extent to which our own studies achieve the goal of democratic knowledge production. What do the five categories mean – and how are the approaches they entail practised – in the social and political contexts of Hong Kong, Taiwan and mainland China? In addressing that question, we reflect upon what we have learnt from both our own collaboration and that with the participants of our studies on the 2014 Umbrella Movement to explore the personal consequences of social movement

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participation for Hong Kong families (Ho et al., 2017b), Hong Kong men (Ho et al., 2018) and young female activists (Ho et al., 2017a) and to initiate a dialogue with the issue's contributors. We discuss some of the opportunities and challenges of confronting the western/northern dominance of academia, from western theoretical hegemony and the valorisation of science to the constraints of knowledge production and dissemination within an authoritarian regime. We propose that democratic knowledge production does not simply require a shift in ethical (recognising how knowledge-making often disadvantages the less powerful), epistemological (recognising how knowledge is produced from the standpoint of those in power) and practical (seeing how knowledge can be used to improve policy) practices, but is also political: it constitutes a political statement, set of political practices and form of social activism, particularly in politically turbulent times when public opinion, civic education and participatory social science all find themselves in jeopardy.

### **Three scholars from the 'East'**

We have struggled with how to introduce ourselves to 'western' scholars, wondering whether it is sufficient to say that we are Chinese social workers and scholars. Two of us were born in Hong Kong and hold PhDs from universities in the UK, whilst the third is a Taiwanese scholar who was educated in Canada. Hence, we are ethnically Chinese scholars/practitioners initiating a dialogue with the 'West'. However, that description just prompts more questions: What is 'the West'? What is 'the East'? How do we define 'Chinese'? 'The West' in this context usually refers not to a geographical location but to the Eurocentric world wherein the dominant population is of European origin. We know very well that the language of Global North and Global South is problematic because it leaves the relatively wealthy East Asian nations/territories out of the picture. As Jackson and Ho (2018) write:

They are certainly not part of the South if that is envisaged as the poor world, but they are still located as peripheral to the metropole even if some of their universities are in the top tier of the world rankings.

There is a profound asymmetry between theory and research generated in the west (or the metropole) and that generated elsewhere (see Bhambra and Connell, 2017; Connell, 2015). Scholars from outside the metropole are obliged to reference western work, whilst little citation flows in the opposite direction (Jackson and Ho, 2018). At the same time, however, we cannot but be aware of Asian economic ascendancy – 'the seemingly irreversible shift to the East, particularly to Asia, of the dynamism of global capitalism' (Bhambra and De Sousa Santos, 2017: 4).

The first author of this review, Sik-Ying Ho, is a gender/sexuality scholar whose work involves the creation and development of new research methodologies, including dialogic filming (Berry, 2013), conference as ethnography (Constable,

2013), cross-sample data feedback (Jackson, Ho and Na, 2017), paired strangers interviews (Ho et al., 2018) and collaborative focus group analysis plus theatre (Ho et al., 2017a). The second, Sui-Ting Kong, considers the lack of women's voices in domestic violence services as an ethical and practical problem (Kong, 2016). She advocates for the participation of abused women and their children in the development and delivery of such services to transcend existing individualist social work practices and embrace Chinese familial culture and its emphasis on mutuality (Kong and Hooper, 2017), leading to the development of a new methodology called 'cooperative grounded inquiry'. Finally, Yu-Te Huang's work is situated at the intersection of mental health, sexuality and cultural diversity. The overarching purpose of his research is to promote social workers' competency in discerning the epistemological and historical foundations of practice knowledge of depression (Huang and Fang, 2016) and sexual behaviour between men (Huang and Souleymanov, 2015; Souleymanov and Huang, 2016). Huang's latest constructivist grounded theory study (Huang and Fang, 2017) illuminates the lived experiences of Chinese immigrant gay men in Canada, bringing into the light their strengths and agency and characterising their intersectional position. What the three of us have in common with one another – and with the special issue's contributors – is our keen concern to produce innovative knowledge through democratic research practices. We would even go so far as to say that we are attempting to create a new genre of writing through our work, not just for academic purposes but also to cope with our own fear of the authoritarian regime in which we live. Our shared concern with cognitive justice (De Sousa Santos, 2014) is what inspired us to become qualitative researchers. Our shared opposition to authoritarianism has made us comrades in the struggle against patriarchy and Communist Party rule through democratic research practices even though they may not constitute the best strategy for surviving neo-liberal university governance.

## **Democratising qualitative research methods to disrupt hierarchical harmony**

Although the democratisation of research has been identified as one of the key methodological challenges for feminists, it has not been widely discussed in the context of democracy movements. The special issue under review features six projects encompassing the principles of democratic dialogue and participation in setting agendas, collecting data and implementing research projects to empower those who used to be relegated to the status of research subjects but who are of the utmost importance to democratic struggle today. As Edwards and Brannelly (2017: 271) point out in the issue's introduction, the reasons for effecting the transformation of conventional paradigms in qualitative and other research processes are 'ethical, political and pragmatic'. We not only concur but take their stance as a starting point for making sense of the challenges posed by the

'indigenisation' of inclusive research in the epistemology of the East, particularly in the contemporary political contexts of Hong Kong and Taiwan, whose futures lay in the hands of the increasingly authoritarian Beijing regime.

The ethical and political are usually intertwined. In their article, Brannelly and Boulton (2017) argue for the need to address the power and privilege with which the diverse individuals involved in research studies have been historically and politically endowed. At the point where different means of knowledge-making clash, the ethics of care is proposed to negotiate difficulties in the research process. Ultimately, 'the purpose of ethics is to interrupt the centring of the dominant, and therefore diminish the colonial act of mastery' (Brannelly and Boulton, 2017: 3). Kara (2017) also argues that power and identity are intrinsic to participatory research aimed at securing equality and sparking dialogue amongst co-researchers. The assumed power imbalance between academic researchers and participant-researchers does not always align with the realities experienced by participatory researchers, meaning that the virtues of care, compassion and equality that many of them uphold can become a 'burden', sometimes even placing them in danger, she continues.

Kara's (2017) account of an incident that threatened a co-produced activist evaluation research project reminds us of the sharp exchanges between the researchers and research participants in our Labouring Women Devised Theatre project (Ho et al., 2017a). One participant, a well-known writer, kept questioning the therapeutic value of the project for women subjected to political persecution even as a number of younger female activists expressed their appreciation of the project and even shed tears. The experience was a reminder that we cannot celebrate our work as if it has a universal impact, particularly on participants who are critical of art-based research or of researchers whose authority they wish to subvert.

Inclusive research always involves people traditionally considered 'subjects', affording them the power to interpret their lives and realities. Research 'with' rather 'for' people generates research knowledge that is relevant, meaningful and practical (action-ready). To meet those quality markers, Nind (2017) proposes a mode of knowledge production that embraces both *phronesis* and *techne*, pointing to the need to transform the pedagogical approaches used to train (co-)researchers through problem-posing learning (see Freire, 1970). Although constructing knowledge that embraces 'both and' rather than 'either or' can transcend differences and foster collective wisdom amongst participating partners, there is no guarantee that inclusive researchers will satisfy all stakeholders or achieve discussion harmony or solidarity amongst participants owing to the dynamic nature of inclusive research.

To enable ethical, political and practical transformation, inclusive researchers therefore need to make 'care'ful judgements in research practice. In developing 'collaborative focus group analysis plus theatre' (Ho et al., 2017a), we created an experimental, democratic and empathetic performance space for women activists, minority groups and those who have experienced political persecution, almost like a *Theatre of the Oppressed*. Collaborative focus group analysis couples a focus

group with a reflecting team (a technique from family therapy) to subvert the power relationship between researcher and researched. In our case, researchers from the sexuality and intimacy fields were invited to view a theatre performance by a group of women activists and then first on the stage then respond to what they had seen in a reflective meeting. Finally, their responses and analysis were then subjected to analysis by the activists themselves. The process engaged the researchers and researched in constant conversational and performative exchanges. Each took on the role of the other in turn, fostering critical reflection, dialogue and emotional exchange. Of the articles under review, we therefore find Erel et al.'s (2017) work on participatory theatre for transformative social research the most relevant to our experience. Our work with female Umbrella Movement activists is similarly aimed at providing a caring, supportive space for socio-political transformation through connecting feminist movements in Hong Kong, mainland China, Taiwan and the wider world (Kong et al., 2018). The sharp exchanges noted above are perhaps evidence of our research participants' intuitive understanding that our research encourages them to question the 'hierarchical harmony' (Ho et al., 2017b) and oppression they have experienced in their everyday lives in a Chinese society. The research platform provides a relatively safe space for learning that disrupting harmony is not a crime! Such research practices create new *political* subjects, including the researchers and research participants alike, possibly forging a new democratic alliance between local activists and international scholars.

These ideas about the transformation of research are also linked to the theorising about 'democratisation' that started in the mid-20th century, particularly with regard to the identification of emerging expectations of equal relationships and lifestyle choices coupled with calls for 'dialogic democracy' involving consultation and participation in decision-making within society more generally (see, e.g. Beck and Beck-Gernsheim, 2002). They also provide us with a foundation for moving forward as activists, academics and practitioners – and a hybrid of the three – in a non-European context. Chinese scholars on this side of the globe are facing challenges variably attributable to the neo-liberalisation of academia and tightened control over freedom of speech under the regime of Chinese President Xi Jinping. We thus call on the world's researchers to recognise that there has never been a greater need for critical qualitative inquiry that matters. We were pleased to learn that the theme of the 2018 International Congress of Qualitative Inquiry is 'Qualitative Inquiry in Troubled Times'. The call for papers emphasises that the world needs 'a discourse that pushes back', a discourse committed to 'a politics of resistance, a politics of possibility and a politics that dares to dream of social justice, to dream of equity, peace and a world without violence'. This is a discourse that speaks exactly to our precarious situation in an academic environment that requires considerable manoeuvring and always results in compromises. In these circumstances, making a commitment to democratic knowledge production is a way to honour the values of equality, human dignity and social justice in the midst of panoptical monitoring (both external censorship and self-censorship).

## **Landscape of ‘outstanding’ research in Hong Kong and Taiwan**

Before we specify the social, cultural and political contexts in which research takes place in Hong Kong and Taiwan, we would like to outline the landscape of ‘exemplary research’ in which ‘outstanding papers’ are produced using the Hong Kong Studies Annual Conference (HKSAC) as a site of scrutiny. It is important to note that the way in which research is judged as outstanding in Hong Kong (and to some extent Taiwan) may actually discourage the pursuit of innovative qualitative and participatory methods. In the past few years, the HKSAC has organised an annual event to honour outstanding papers in various disciplines. A review panel comprising distinguished local scholars has been tasked with identifying ‘outstanding papers’ in the five major streams of Hong Kong studies: politics and law, sociology, communication, history, and arts and culture. The 2017 review exercise identified 188 papers published in peer-reviewed English-language academic journals from 1 July 2015 to 30 June 2016. To offer an outline of the research landscape in Hong Kong, we have reviewed the abstracts of those papers to identify participatory action research (PAR) and studies making use of inclusive or feminist methodologies.

Of the 188 papers, 48 reported qualitative studies, with nine studies using mixed methods. Nine of the qualitative studies involved document analysis and a news review, and all 48 involved interviews with a view to understanding participants’ lived experience. The latter studies adopted theory verification, critical discourse analysis, grounded theory methodology and phenomenological approaches, and the major methods of data collection were interviews, focus groups and ethnographic observation. Although efforts at sample diversification were in evidence, with interviewees including women (Adams, 2016), students (Dukic et al., 2015), youth offenders and legal practitioners (Cheng et al., 2015), local and tourist consumers (Chan, 2015), social movement participants (Bhatia, 2015), and domestic workers (Boersma, 2016), PAR, theatre performance, documentary film, creative writing, photo collages or any other methodologies that could be seen as remotely innovative were conspicuous by their absence. In none of the papers considered did the participants share decision-making power over the research topics/research design, and neither were they involved in data analysis/interpretation. Of the five outstanding papers selected by the panel, only one featured ethnographic fieldwork, which was applied to analyse the ‘death narratives’ of Hong Kong film personnel (Martin, 2015). Even without information on the selection criteria, the underrepresentation of innovative methodologies or democratic research practices is obvious. Of course, we cannot claim that a review of 188 papers from a single year is in any way representative of the Hong Kong situation. A thorough review is definitely in order.

Thus far, we have focused on identifying PAR as an entry point to painting the landscape of what qualifies as outstanding research in Hong Kong and Taiwan as we face the challenges of arriving at an understanding of indigenous and post-colonial research in our particular contexts. Although we work in post-colonial



societies struggling to maintain some elements of ‘Chineseness’ and local culture, we can find few examples of research methods that have developed from the de-colonisation and de-imperialisation agendas. Ho et al. (2013), for example, adopted the concept of body-mind-spirit to make sense of the holistic health of patients, whilst Kong and Hooper (2017) developed a familial community of practice with domestic violence survivors to support the democratic transformation of family practices. However, these efforts have not yet led to the translation of cultural, social and spiritual concerns into methodological approaches that ‘edit our voices, with a view to what we think outsiders will count as knowledge and what we choose to articulate’ (Barnes et al., 2017) and share with [western] academic audiences.

Understanding the colonial history and sub-national status of Hong Kong is complicated by the internationalisation agenda of China. In the higher education arena, for example, Hong Kong is strategically employed as a bridge between China and the world (Mok and Cheung, 2011). The Hong Kong government has identified a need to improve Hong Kong’s global competitiveness by building ‘world-class universities’ to compete with the economic powerhouses of Beijing, Shanghai and Guangzhou. A clear indicator of international academic excellence is publishing in high-impact peer-reviewed journals, which disproportionately favour quantitative studies. Perhaps with the exception of psychology, which employs largely quantitative and experimental methods, the social sciences in Hong Kong struggle to achieve such excellence. Hence, social work and sociology, disciplines in which qualitative research is prevalent, tend to be considered weak under the hierarchy of knowledge established in Hong Kong academia, a hierarchy underpinned by market logic and the globalised economy of knowledge, leaving little room for innovative qualitative inquiry that is not to be made a scapegoat for the failure to demonstrate international competitiveness. Social work scholars, particularly those specialising in gender, sexuality and intimacy studies, gain better recognition when they are able to approach their research from a public health perspective or conduct intervention studies incorporating randomised controlled trials in pursuit of generalisation. However, the recent introduction of research assessment exercises to Hong Kong higher education, with their emphasis on originality, rigour and impact, may reclaim space for innovative qualitative inquiry, although the worship of impact factors and journal rankings still often complicates actual research and publication practices.

In our search of papers published in Taiwan in the same year as the aforementioned HKSAC review, we were encouraged to discover a few studies whose titles explicitly indicated that they were reporting PAR. Participants included survivors of domestic violence (Liuh and Chan, 2009), students (Chan, 2015) and teenagers (Lin, 2016). It appears that some Taiwanese scholars recognise the potential of participatory/innovative methodologies to deepen our understanding of participants’ complex lived experiences. However, these experiments have emerged primarily in specific fields (e.g. arts-therapy). A search of Airiti Library, a major database of electronic journal articles published in Taiwan, using PAR as a

keyword yielded 13 articles spanning nursing (Huang and Wang, 2005), community development (Chen et al., 2001; Huang and Su, 2017; Lu et al., 2011), special education (Huang, 2011), sex/gender (Wang, 2011) and other areas. In view of this progressive trend, we can say that PAR has not been entirely marginalised in Taiwan, at least relative to Hong Kong.

Despite the accumulation of PAR in Taiwan, it must be admitted that these studies' visibility and dissemination in the 'western' academic world are highly limited, as most were published in Chinese. Arguably, however, it is the persistent emphasis in Taiwanese academia on the construction and dissemination of local knowledge in Chinese (Chen, 2003) that has permitted and facilitated democratic knowledge production in Taiwan. At the same time, the higher education review system with respect to tenure, promotion and academic evaluation does count publications appearing in local Chinese journals. These institutional parameters likely play a role in encouraging the use of innovative, participatory research methods in the social sciences. However, whilst Taiwanese scholars enjoy a certain degree of freedom in their choice of research topics and methods, there are under growing pressure to publish in international journals if they want to be seen as competitive, productive and globalised researchers/scholars (Kuo, 2005). There is also a growing trend towards the self-colonisation of higher education in Taiwan (Hwang, 2016), with the space for inclusive, participatory and innovative methodologies narrowing.

The increasing emphasis on international competitiveness is clearly affecting both Hong Kong and Taiwan. Although the latter's tenure system provides greater recognition of and more incentives for the indigenisation of academic research, Taiwan is still confronting the challenges of the global economy of academic knowledge. However, scholars in Hong Kong and Taiwan alike are trying to incorporate 'Chinese' concepts into scholarly understanding of the body, health, family practices and sexuality. This review of the landscape of 'outstanding' research in the two locales confirms the need for 'multi-epistemological research partnerships that revolutionize the research methods landscape, bringing new paradigms onto the map to advance new research methods that engage and transform communities' (Chilisa et al., 2017) in Chinese contexts.

## **The politics of democratic knowledge production in Hong Kong and Taiwan**

The democratisation of knowledge production requires more than an epistemological, ethical and practical agenda. It requires a political one. When generating knowledge through a democratic approach, researchers need to take the critical step of envisioning the possible political implications thereof. For example, researching sex in mainland China may involve the politicisation of gender studies and sexuality research, thereby revitalising and expanding the 1960s mantra 'the personal is political'. Such attempts unquestionably cannot hide behind the



neutrality of academic practices. To the contrary, they resulted in the arrest of five feminists in 2015 (see Fincher, 2016), as well as a growing clampdown on scholarship and any form of speech seen as threatening the regime.

By contextualising the discussion of colonial privilege raised by Brannelly and Boulton (2017) in the special issue under review in Hong Kong and Taiwan studies, we are attempting to highlight the challenges of conducting inclusive research under an authoritarian regime. Those authors advocate adopting an ‘ethics of care’ to unravel the way in which research has largely been constructed around and shaped by western concepts and values. Such ethics can also serve as a tool for examining inequality, injustice and the marginalisation of voices at the local level. Interestingly, Yuen (2015) reports that China has organised a campaign against western values and recently established a new Internet regulatory body – the Cyber Administration of China – to combat threats both domestic and foreign. The country’s current anti-western ideology has contributed to the demise of issue-based activism in the areas of environmentalism, women’s rights, public health, human rights and civil society expansion. In these circumstances, conducting ‘care’-ful research in Hong Kong, Taiwan and China has become something of a double-edged sword, and going forward we can also anticipate even more obstacles to such research given that democracy is perceived by both the Hong Kong and Beijing governments as an invasion of western values and subversion of the party-state. The inclusive research that we have conducted in Hong Kong and Taiwan has also exposed the potential political consequences of democratic knowledge production. Democratic practices in knowledge production not only run counter to the political revival of Confucianism as a valued part of China’s cultural heritage (Bell, 2008, 2010) but also challenge hierarchical decision-making and respect of seniors by juniors. Cheung (2012: 205) argues that Confucianism ‘provides new discursive resources for continuing authoritarianism’, central to which is emphasis on harmony. In contrast to ‘hierarchical harmony’, democratic practices empower those at the bottom to speak up to those at the top in both public and private (Ho et al., 2017b; Ho et al., 2018). The concepts of ‘harmony’ and a ‘harmonious society’ have become increasingly prominent in the political rhetoric of the party-state, and even been capitalised upon by the Hong Kong government to jail young activists for destroying social harmony by opposing all proposals from the government (SCMP, 2017).

In the climate of increasing censorship under the Xi regime, the lack of clarity about what is and is not permissible is rendering Chinese scholars ever more cautious and likely to engage in self-censorship. Fortunately, public discourse that supports bottom-up decision-making, autonomy and non-hierarchical dialogue is still in evidence in Hong Kong and Taiwan, although it is facing constant challenges from Beijing. Social research, if conducted innovatively and democratically, can still provide a space for supporting and sustaining counter-authoritarian narratives. Compassionate awareness and consciousness may bring about collective ethical actions (Cheung, 2016) that are political in nature.

## Conclusion

Under the umbrella of democratising knowledge production, academics are resisting the longstanding power imbalances between the researcher and researched, the privileged and marginal, and the West/North and South/East. The special issue of *Qualitative Research* under review documents the footprints of inclusive researchers, as well as their resistance efforts and struggles. In resonance with our own experience as scholar-activists in politically turbulent times, we see the editors of and contributors to this special issue as wielding an umbrella against injustice, just like the protesters in Hong Kong's Umbrella Movement who had nothing more than an umbrella to ward off tear gas and fight for social justice and equality in the face of violence and oppression. Developing innovative methodologies to promote democratic research practices that enable us to explore the impact of political participation on personal lives is our way of engaging in peaceful activism against the violent structures and values of academia and society alike. The way we cultivate awareness and equality as research and academic practices is part of our struggle for democracy in a time of political turbulence and limited options. As citizens living under increasingly authoritarian rule, we are grateful to still be able to work on expanding scholarly understanding of what constitutes transformative, inclusive, co-produced, indigenous and care'ful research in the company of inclusive researchers from all over the globe. We are proud to join them in applying democratic research practices to transform ourselves and our research participants into new academic-political subjects.

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