A special territory: visions of Hong Kong and its people

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Chapter One: Introducing Hong Kong and the Research

A typical history might describe Hong Kong as an area on the southern tip of China encompassing several islands, including the eponymous Hong Kong Island [香港島], the founding site of the British colony in 1841, lending its name to the territory. The British Government governed the area as the Crown Colony of Hong Kong for 156 years until the 1997 handover to the People's Republic of China (PRC). The territory of Hong Kong has since been governed under a structure called One Country Two Systems (OCTS), conceived during the handover negotiations in the 1970s and 1980s. Under OCTS, Hong Kong would have a high degree of autonomy on most governance matters except for defence, national security, and certain diplomatic issues. Hong Kong people would further be able to continue their way of life unchanged for a fifty-year adjustment period after the handover, until 2047, when it would presumably fully integrate with the PRC. What form its integration would take, or how Hong Kong society could remain unchanged while at the same time gradually integrating into the PRC, remains ambiguous.

Hong Kong, a territory with a population of around seven million, experienced what many termed a golden era in the 1960s and 1980s. Its economy flourished, and its vibrant culture gained global popularity. During this time, stereotypes emerged, portraying Hong Kongers as apolitical, inhabiting a land of opportunity [福地] where hard work was rewarded. Writing in this context, the people of the British colony of Hong Kong had no "suicidal demands for self-government" as Hughes, a local journalist, describes the 1980s (Hughes, 1989, p.36). However, just decades later, following its handover to the PRC in 1997, Hong Kong witnessed a seismic shift. In 2014 and 2019, hundreds of thousands went out on the streets in massive protests, demanding universal suffrage. In 2019, slogans such as "Hong Kong independence the only way out" [香港獨立唯一出路] rang through the streets. How did this dramatic transformation occur?

It might be easy for a visitor to confuse the territory with a nation-state or country. Hong Kong as a state under OCTS functions similarly to how people experience nation-states. Entering the territory of Hong Kong, visitors encounter a typical customs experience, needing to go through visa procedures, and separate border procedures are necessary when traveling from Hong Kong to Mainland China. The Hong Kong state has its own currency, language, flag, and other signifiers that visitors would likely identity as national. The state of Hong Kong represents itself as distinct from the PRC alongside numerous nation-states in international sports and the Olympics. The Hong Kong state and territory are comparable to other territories that are "special" such as Scotland (vis-à-vis the UK), Catalonia (vis-à-vis Spain), Okinawa (vis-à-vis Japan), or Quebec (vis-à-vis Canada). Hong Kong is a territory with its visa and customs, police force, education system, stamps, telecommunications code (web address .hk, telephone code +852), foreign relations, and an internationally recognized leader in the form of a Chief Executive. Nevertheless, Hong Kong society under OCTS is not a country or a nation but an anomaly in the world. It is a colony colonized twice, a territory that knows it will be de-

territorialized. As such, Hong Kong can teach us much about the theory and practice of nations and nation-states.

Hong Kong's future has become increasingly contentious as the PRC and Hong Kong governments pursue integration with the PRC. Tensions between different visions of Hong Kong have emerged in various protests and social movements, the largest of which occurred in 2014 and 2019, which thrust Hong Kong into the global spotlight. These protest movements expanded beyond their original grievances to extend to the future of Hong Kong society under OCTS and fears of growing repression by the PRC. While the Umbrella Movement (2014), triggered due to changes to electoral law, was mostly peaceful, the Anti-Extradition Bill movement (2019) was marred by increasing violence. Images of protests circulated worldwide as Hong Kong captured global attention for months. These images depicted hundreds of thousands, if not millions, of Hong Kongers demonstrating, being shot at with tear gas, hurling Molotov cocktails, and becoming embroiled in escalating violence. The cause of the 2019 protests was a proposed extradition agreement with the PRC, and the protests, like the 2014 Umbrella Movement, grew into wider-ranging frustrations around Hong Kong's post-handover status, especially the lack of democratic reforms. As a response to the 2019 protests, the government enacted the National Security Law (NSL) in 2020, which has stifled civil society in Hong Kong and made public protest difficult. The year 2022 marks twenty-five years after the handover, and initial optimism has made way for pessimism following successive civil unrest.

Hong Kong state and society are at a crossroads between on the one hand the PRC, which follows the nation-state model, and on the other hand a people that have thrived under a colonial government and subsequently resisted nationalization by the new state. The PRC has followed the nation-state model since its founding in 1949 as its leaders want it to be seen as a modern, capable nation-state (Duara, 1993; Hui, 2020). This model pursues an ideal of common language, history, culture, and often ethnicity. As a nation-state, the PRC is following similar national strategies preceded by the likes of France, Britain, the United States, and Indonesia (Anderson, 1983; James, 1996). All have committed atrocities in the name of the nation, eradicating minority languages, peoples, and cultures, and this helps to understand the how and why of the actions of nation-states that pursue the national model.

While the PRC is pursuing a policy of integration in Hong Kong, many in Hong Kong consider themselves and Hong Kong distinct from the nation-state they are supposed to belong to. This happens under the banner of localism, a catch-all term that ranges from appreciating anything Hong Kong (from food and pop culture to flora and fauna) to activism in the form of preserving heritage and, in extreme cases, calling for independence. This tension between the two visions of Hong Kong (integration with, or separation from Mainland China) forms the marrow of the research.

1.1 Research Question and Method

My key primary sources are four books released from 2008 to 2019: three from a Hong Kong localist point of view and one that aligns with the Chinese government. These texts serve as gateways to various widespread visions of Hong Kong. They are

1. *China's Hong Kong [*中國香港] by Jiang Shigong [強世功] (2008), an academic work published by Oxford China,
2. *On Hong Kong as a City State* [香港城邦論] by Chin Wan [陳雲] (2011), a manifesto published by Enrich Publishing in Hong Kong,
3. *On Hong Kong as a Nation* [香港民族論] by the University of Hong Kong Student Society (2014), a collection of essays published by the student society itself; and
4. *Hong Kong Independence* [香港獨立] by Yu Jie [余杰] (2020), a collection of essays published by Lordway Publishing Company (known for publishing critical works about the PRC), written during the 2019 Anti-Extradition Bill movement and meant to instigate the people to activism. Chapter three addresses these works in greater detail. Each text offers a different vision of the Hong Kong state, its people, history, and future.

The first three have especially impacted Hong Kong. Nativist and localist political parties have cited *On Hong Kong as a Nation* and *Hong Kong as a City State* as inspirational sources (Veg 2017). Authors of both works have formed political parties and civic organizations (since banned or disbanded) aimed at promoting localism or sometimes independence. *China's Hong Kong* is discussed frequently in scholarship, and Jiang, its author, worked for the PRC's Hong Kong Liaison Office, the representative office of the PRC government in Hong Kong, for four years. The fourth book, Yu's *Hong Kong Independence*, is a popular work that explicitly advocates independence and reflects the hardened attitude of many of the more radical localists in Hong Kong following the 2019 protests.

This research originates from two broad questions: What is Hong Kong, and who are its people? Asking the 'what' question about any territory will be complex. Definitions overlap and are rarely clear-cut. Defining Hong Kong as a special territory of the PRC, as it is officially known, engenders other questions. What is a special territory, what size is it, what makes it special, and who belongs in it? Answering the 'what'-question for Hong Kong will tell us much about Hong Kong and its significance to the world. Furthermore, as an anomaly, it can inform us about a measure of arbitrariness in how political and social systems are enforced and imagined.

As for the people of Hong Kong, my four key primary sources offer vastly differing interpretations of what Hong Kong means today and to whom, what it has meant in the past and to whom, and what the future holds for Hong Kong. While there have been isolated articles discussing the formation of national ideology in/for Hong Kong, there has been no systematic study of what I identify as a set of primary ideological currents at play in Hong Kong. There has been a lot of discussion of the said four works in Hong Kong academia, particularly in their relation to localism and nationalism (for example, Sautman & Yan, 2015; Wu, 2016, 2016; Veg, 2017; Fong, 2020; Carrico, 2023), but these contributions do not engage with the said ideological currents in

conjunction, which is where I hope to contribute. To this end, I have reworked my original two questions into two research questions that drive this project, focusing on nation-states and belonging:

- How is Hong Kong positioned in the nation-state system?
- Who belongs in Hong Kong?

This research contributes to the existing scholarship by analysing the larger ideological implications of Hong Kong's identity and nationalism formation within different discourses. While the four texts exemplify the ideological flows of many of the social and political movements seen in Hong Kong since the handover, they have not been studied systematically. Why is there a drive amongst many in Hong Kong towards nationalism and national identity formation, why is the political imagination largely confined to a nationalist vision, and why do both activists and academia need to conjure up a Hong Kong nation with an associated national identity? I look at how academic theories have affected Hong Kong society by providing localists with justification for ideas of a potential Hong Kong nation and its people.

To compare the four works under scrutiny, I ask the following questions:

1. Who are the authors, and what is their background?
2. What do they consider Hong Kong to be?
3. Who do they think are the people of Hong Kong?
4. What is their perspective on Hong Kong's relation to China and Chineseness?
5. How do they evaluate Hong Kong's colonial past?
6. How do they evaluate the post-handover period?
7. What is their vision of the future of Hong Kong?

These questions aid me in comparing and linking the different works thematically. They also allow me to connect the works to my primary framework: theories of nationalism. Hong Kong, however, is not a nation, and certainly not a European nation, where most of these theories originate. If the territory or state of Hong Kong is not a nation, how could I apply theories of nationalism to Hong Kong? To get out of this conundrum, I start with the assumption that Hong Kong under OCTS is somewhat like a nation-state, in light of the "visitor experience" outlined above. Hong Kong further fulfils the definition of state as provided by Gellner (1983, p. 3), who frames the state as a "set of institutions concerned with the enforcement of order". Chapter Two discusses in detail the definition of the nation, its relation to the nation-state, and how the Hong Kong state might fit.

Besides the four works, my material consists of sixteen interviews. Most interviewees were fine arts graduates I contacted after visiting an exhibition in the context of researching the 2019 protest movement and Hong Kong identity. This provides me with a diverse yet clustered group, from an almost retired social worker to a lawyer in his thirties or full-time students who just graduated from high school. Nearly all interviewees, to varying degrees, identified themselves as ethnically Chinese, with some denying Chineseness in favour of Hong Kongness. I also draw on informal conversations with other ethnicities in Hong Kong who self-identify as Hong Kongers. I do not aim for representativeness in my interviews but consider them to add a layer of context to the analysis of the

four works. The interviews were held as semi-structured conversations, meaning I had a set of topics I wished to discuss and let the conversation run freely within the framework of the interview questions. I asked broad questions such as about the interviewee's conception of Hong Kong history and culture, what they define as a Hong Konger (香港人), whether they saw themselves as Chinese, and the meaning of "local" in Hong Kong.

Interviews lasted from one to three hours. Twelve were conducted in English, three in Cantonese, and one in Mandarin. I took notes during the interviews after receiving permission to do so. I gained informed consent for the interview before the meeting by stating the nature of my research and the results (a dissertation and academic articles). When meeting face to face, I introduced myself again and stated the premise of the interview and how I would handle their answers, noting that they could opt out at any moment. I did not record personal information apart from their given name (not their family name) and age. The interviews are referred to in the text as I+interview number. For example, "Hong Kong is people" (I-13)

Discussing mainly Chinese interpretations of Hong Kong, it might be easy to forget that Hong Kong is a multi-ethnic city. Many non-ethnic Chinese Hong Kongers have lived in Hong Kong for longer than most Chinese people, who mostly came in multiple immigration waves following the Second World War. One could argue that Hong Kong is a Southeast Asian City through its rich history and present communities of people from Sri Lanka, India, and other former British colonies migrating to Hong Kong. Or one could argue that Hong Kong is a Eurasian city with European (majority British) and Asian influences. The non-Chinese in Hong Kong should not be reduced to a counterexample, turning these peoples into token minorities to prove Hong Kong's cosmopolitan nature. However, as this research is mainly concerned with Chinese interpretations of Hong Kong, I will not deal with them in this research.

This leads me to what I believe are the main limitations to the approach of this project. The interview selection privileges ethnic Chinese, Cantonese speaking Hong Kongers rather than including other Hong Kong ethnicities and a more comprehensive range of political views. My pool of interviewees was mostly based on convenience sampling. Still, as argued in the introduction, the aim is not representativeness of the population but rather to contextualize certain prevalent discourses articulated in Hong Kong society and made explicit in the four works. The selection of the works poses a similar limitation. All selections exclude something, and there were many works that I did not discuss, or barely discussed, which nevertheless would have offered a different look on things. I did not include Chin's other books. This was a conscious choice to focus on a moment in time when these books were published, with the developments in Hong Kong society (protests, polarization) in hindsight. I could further have discussed Tsui's historical works in depth, as Carrico (2023) does, for example. The decision to adopt a more in-depth close reading approach has naturally limited the scope. This is something that I hope to alleviate in future research by discussing other sources such as localist works of fiction and non-fiction published after the 2019 protests, most of which written in Chinese, that form part of the growing debate on what it means to be a Hong Konger.

Consequently, much of the research is about how the Hong Kong state is imagined from a Chinese[1] point of view. These imaginations differ greatly, ranging from a state-oriented point of view from the PRC wanting to fold Hong Kong into the existing national narrative to one that explicitly rejects Chineseness in favour of Hong Kongness, and from the starting point that affirms the Chineseness of Hong Kong state and society to one that rejects this. In Chapters Four and Five, I will return to these matters.

Returning to the four books I study, one might ask: Are these representative of the various discourses that are at play in Hong Kong? How were they read, discussed, and so on, especially in the fast-moving, turbulent environment of Hong Kong since the mid-2010s? Should I have included other writings by the authors in question? The four books under scrutiny have been and are being discussed often and have had significant theoretical and practical impact in Hong Kong, with the exception of Yu's *Independence*. They are discussed academically and cited by (since defunct) localist organizations and in interviews. Localism and (sometimes) nationalism in Hong Kong society is a multifaceted affair. I hope to show that these localist and nationalist discourses are indicative of larger discourses in Hong Kong. Theory-making affects the real world, and Hong Kong is an excellent example. It is important to remember that Hong Kong is not an abstract entity or theoretical concept. It is alive, lived, and experienced by millions of people. How it is lived and experienced stands at the centre in different interpretations of the meaning of Hong Kong during growing tensions between the populace and the authorities since before and especially after the handover.

1.2 A Note on the Notion of Articulation

I am indebted to articulation theory in the analysis of the four texts and my interviews. One of the strengths of this theory, which originated from cultural studies, is that it helps me create context and push back against deterministic interpretations (e.g., of class, race, nation). One of the main concepts of this research is nationalism, which I consider an ideology. Articulation works well with the study of ideology, as both articulation and ideology represent different approaches to understanding things that present themselves as complete, unquestionable, and understood: the normal.

Articulation is foremost historical, critical, and anti-determinist in nature. It frequently finds application in the analysis of various media forms, such as television or popular culture (Slack 2006; Wilson 2013), elucidating how power dynamics, such as those within the context of gender and race, are manifested. Articulation theory shows the potential for change by pointing out that the categories that make up our everyday life are never necessary but are always historically constructed and situated. Critics or social theorists must look for new ways to (re)construct the social (e.g., class, race) to address inequality. For example, articulations and de-articulations of the British colonial legacy and its ties to Hong Kong identity constantly shift in Hong Kong. Hong Kong identity and colonial legacy are de-articulated by the Chinese government, which wishes to emphasize a Chinese national identity.

[1] Although some authors might reject this label.

They are articulated or re-articulated by Hong Kong localists who see their colonial history as a point of pride as opposed to the current identity work by the PRC.

As Stuart Hall (1986, p. 53), in an interview with Grossberg, said about articulations:

> It is a linkage which is not necessary, determined, absolute and essential for all time. You have to ask, under what circumstances can a connection be forged or made? (…) it enables us to think how an ideology empowers people, enabling them to begin to make some sense or intelligibility of their historical situation, without reducing those forms of intelligibility to their socio-economic or class location or social position.

Stuart Hall's passage above lines up three vital ingredients of articulation theory. Firstly, it is concerned with linkages that are not always necessary and never permanent. Secondly, these connections are formed under certain circumstances and certain conditions, underlying a particular period's historical and societal particularities and the non-deterministic character of articulation. Thirdly, articulation helps to think about how a specific ideology empowers people. In the case of Hong Kong, articulation helps in thinking of the particular circumstances in Hong Kong and how nationalists are, for example, empowered at certain historical moments to write their vision of Hong Kong. I will now examine these three points in detail.

First, as Clarke (2015) notes, articulation was initially a way to reconceptualize the analysis of social formations. Hall's vision of ideology follows a Marxist tradition, which serves as a lens to consider applications of the (then) new field of cultural studies, which could move away from social totalities to a more nuanced expression. Drawing on Gramsci's conceptualization of hegemony and common sense, Hall constructs articulation as a political practice, which "implies paying attention to common sense, its multiplicity, its fractures, the desires it voices, the silences it contains and more" (1981, p. 230). What is common about common sense, the given, the normal, is a construction contingent upon historical and material conditions.

Hegemony and common sense are interlinked in Hall's interpretation of Gramsci. The ruling bloc articulates ideas and conceptions through which the subordinate groups "come to identify themselves in the leading project" (1981, p. 279; Halberstam, 2011). This is not to say that all common sense is constructed through ruling blocs, but rather that common sense makes up the elements that shape our understanding of the world (e.g., the nation-state, the economy, the political structure). As Slack (1995), discussing Hall, notes, articulation has opened up ways to think about how "structures of dominance and subordination" in society might be re-articulated and how it might be possible to construct articulations to "intervene in history in a progressive way" (Hall in Slacks 1995, p. 124). Clarke calls this the embodied practice of articulation, in which theory is not just an abstraction but a pedagogical and political practice. Articulation theory helps uncover power structures, domination, and the arbitrary and often violent nature of things considered normal.

Second, the notion of "certain historical moments or circumstances" naturally leads to a discussion of context, a vital point in both articulation and cultural studies (Grossberg, 2006). Grossberg notes that context is relational, and an event can only be understood in terms of the

multiplicity of articulations that formulate the present moment. Following Grossberg and Hall (2006), contextualism conceives history as a continuous process in which structures, unities, and (social) relations are constantly articulated, de-articulated, and re-articulated. Articulation is primarily concerned with the discursive. However, it acknowledges the material conditions that underly discursive and historical practices. Hall writes: "material conditions are the necessary but not sufficient condition of all historical practice. The material conditions must be thought of in their determinate discursive form, and not as a fixed absolute" (1986, p. 57). As noted, articulations are always constructed, which allows for change. One example is the articulation of 'gender' and 'sex' in different societies at different historical moments (Butler, 1990). The awareness of contextualization further embeds within itself a non-determinist stance, as articulations are not always essential.

Third, Hall (1985) uses articulation to move away from fixed structures, particularly those of class and ideology (and their relation). Discussing Gramsci in relation to Marx's economic determinism, Hall reaffirms the move towards a "non-reductionist" type of analysis. Articulation is, therefore, a move from reductionism towards situating things in terms of linkages created in specific historical moments. Hall draws on Gramsci to distance himself from the deterministic conception of class that was prevalent at the time. He writes: "[Gramsci] shows how the so-called 'self' which underpins these ideological formations is not a unified but a contradictory subject and a social construction" (Hall 1996, p. 440). As noted above, no articulation is permanent, meaning there is always the potential for change, a possibility to re-articulate or de-articulate certain (social, political, etc) configurations. As Clarke writes, the internal organizations of articulations by themselves involve contradictions and tensions.

In conclusion, articulation theory helps in thinking about how the circumstances in Hong Kong have led to the creation of the four different visions of Hong Kong that this work focuses on and how these visions are articulated or embedded in everyday meaning.

1.3 Chapter Overview

Chapters Two and Three are concerned with the main concepts of the research, Chapters Four and Five are devoted to the case study, Chapter Six offers a discussion, and Chapter Seven offers a conclusion.

Chapter Two discusses nations and nation-states. I will discuss prominent works that discuss the definition of the nation, how it came into being, and how it differs from a nation-state. How do the (national) people relate to the nation (state)? I will further discuss whether Hong Kong as a political entity fits within the nation-state system. Which features of the nation do Hong Kong state and society have, and does it make sense to analyse Hong Kong as a nation or a nation-state?

Chapter Three is about the creation and maintenance of the nation through the ideology of nationalism. What is nationalism and its role in the nation, and how can the concept of ideology help us understand the workings of nationalism? I focus on the role of the intellectual as an important

factor in creating nationalism. In this context, I discuss Hong Kong localism and the four works through the lens of the intellectual and ideology. This discussion lays the foundation for the case study in the next two chapters.

Chapter Four discusses Hong Kong's political status and the Hong Kong people. What kind of political entity is Hong Kong, and how is this regarded in the four texts and my interviews? I show how Hong Kong is pulled into different directions and that this holds for both the territory and political entity of Hong Kong and the people residing there. I discuss civic and ethnic visions of Hong Kong people.

Chapter Five is devoted to the past and future of Hong Kong and how its past is used to justify a vision of its future. I show how Hong Kong history as a localist category has come up in recent years and how history is used to create a future for Hong Kong as either an independent nation, a part of China, or something else altogether. Chapters Four and Five intermingle the interviews and the four texts to show various perspectives on the issue. I have chosen this format to build a general context of the issue.

Finally, in Chapter Six, I argue that Hong Kong shows us not just the limits and the possibilities of social theory but also its power to shape social developments, even if social developments shape the theory to begin with.

In Chapter Seven, the conclusion, I connect Hong Kong to nationalist theory and the limits of academic imagination and posit that theory has become too caught up in abstractions, rather than in the reality it is meant to describe and explain.