

## Pursuing Qualitative Research *From* the Global South: "Investigative Research" During China's "Great Leap Forward" (1958-62)

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**Key words:**

qualitative  
research; Global  
South;  
investigative  
research; China's  
Great Leap  
Forward;  
decolonizing  
methodologies

**Abstract:** Over the last decade, qualitative researchers have begun to challenge the domination and universalistic claims of the Global North. Nevertheless, it is still unclear what pursuing qualitative research (QR) *from* the Global South might entail. I advance this effort by situating it in the larger context of the decentering endeavor in social science and decolonizing methodologies in aboriginal scholarship. Informed by their locally-grounded approach in the quest for constructing alternative social science accounts and articulating decolonized knowledge, I argue that writing locally-grounded histories is an essential first step to explore methodologies and epistemologies of QR *from* the Global South. Noting that no national history of QR has been derived from the Global South, I present an example of writing the history of QR by examining MAO Zedong's legacy of "investigative research" (IR). Specifically, I analyze the practices of IR during China's "Great Leap Forward" (1958-62). In conclusion, I discuss the implications of IR to the development of social science research in contemporary China. I lay out key issues in pursuing QR *from* the Global South and present how such a pursuit is relevant to social science inquiry in the Global North.

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### 1. Introduction

Over the past decade, qualitative researchers have made concerted efforts to decenter the domination of the Global North in qualitative research (QR).<sup>1</sup> These efforts have resulted in writings about the early establishment of QR in the Global South after being introduced from the Global North and how specific methods

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1 Researchers have used various terms to capture the global divisions in knowledge production. In this article, I adopt the term North/South and core/periphery to summarize main arguments in the existing literature.

have been used locally (BOLIVAR & DOMINGO, 2006; BRUNI & GOBO, 2005; CISNEROS PUEBLA, 2000; CORRADI, 1988; DZVIMBO, 1994; KATO, 1988; KIM & CHO, 2005; MAST, 1988; OOMMEN, 1988; SCHUBOTZ, 2005; SUZUKI, 2000; WEIL, 2005; WYKA, 1988). Despite qualitative researchers' critiques of the universalistic claims and global domination of the Global North in relation to QR, it is still unclear what pursuing QR *from* the perspective of the Global South might entail. [1]

Researchers have presented two propositions regarding QR in the Global South. On the one hand, scholars like RYEN (2011) dismiss the necessity to uphold the conceptual North-South divide. She argues that this divide was a critique directed toward the classic, colonial "methodological imperialism" of the past, noting that qualitative researchers from the core have since acquired sufficient methodological insights to refrain from presenting those from the Global South as stereotypical "others" (p.439). Although she welcomes "new epistemological alternatives or adjustments based on philosophical traditions and practices in non-Western contexts" (*ibid.*), such alternatives/adjustments would presumably be employed by scholars from the Global North in their studies of the Global South. RYEN did not discuss the possibility that scholars from the Global South can produce legitimate research about their own land in their own right. Nor did she acknowledge the effects of the researchers' locations and positions in knowledge production and the values in North-South dialogue. In contrast, ALASUUTARI (2004) has critiqued the perpetuation of the Global North's domination. But at the same time, he portrays qualitative researchers from the periphery as simply retrieving, modifying, and returning tools from a QR "toolbox" that is presumably created in the core (p.606). This perception neglects the well accepted position in QR regarding the interconnectedness of methodology, epistemology, and methods that challenge the assumption that researchers can simply employ research techniques without examining the effects of their methodologies and epistemological lenses. Thus, it precludes discussion of the implications of such interconnectedness to pursuing QR from the perspectives of the Global South. [2]

Pursuing QR *from* the Global South is to challenge RYEN's assumption that researchers from the Global North have the exclusive privilege to study the Global South so that scholars from the Global South can begin to assume positions as researchers to study their own societies. It must also depart from ALASUUTARI's proposition by identifying and examining ubiquitous methodological practices and/or epistemological lenses used in local QR and/or social science research. Before researchers are ready to articulate perspectives of QR from the Global South, it is necessary to map out histories of social science inquiry of the Global South. Writing locally grounded histories can help identify diverse QR traditions, lay the groundwork for enriching QR, and decenter domination by the North in a global era. Ultimately, mapping histories of social science inquiry of the Global South will challenge the normative genealogical trajectory of QR from the Global North. [3]

Although ALASUUTARI has proposed a spatial metaphor as a critique of the linear, unidirectional evolution of QR in the Anglo-American core described by DENZIN and LINCOLN (2005), to date, no national history of QR has been derived from the Global South. It is not clear what research traditions actually exist locally as a means of knowledge production, how these are similar to or different from QR of the Global North, what the implications are of having these traditions for the practice and development of QR in the Global South, or how these locally grounded histories may enrich QR in a globalized world. [4]

Two bodies of scholarship that have effectively challenged the asymmetric North-South divide in knowledge production render support to the significance of advancing the quest of QR from the Global South through writing locally grounded histories of QR: 1. the de-centering effort of writing sociology or social science knowledge from the Global South and 2. decolonizing methodologies articulated by Aboriginal scholars. After decades of effort, the former has effectively disputed the claim made by SZTOMPKA that there is no "new original indigenous theory" except the "universal" sociological knowledge produced in the North (2011, p.392) by engaging in de-centering projects intended to construct social science knowledge that is grounded in national sociologies (ALATAS, 2006; BHAMBRA, 2007; CONNELL, 2011). In contrast, the latter includes Aboriginal researchers in Canada, Australia, and New Zealand who, as part of the decolonization endeavor, have challenged methodological practices and epistemological foundations of Western-centered knowledge production (BISHOP, 2005; KOVACH, 2009; SMITH, 1999). These researchers foreground the praxis and worldviews of indigenous knowledge to demonstrate the rationale and transformative promises of decolonized knowledge and the disjuncture of indigenous and non-indigenous methodologies and epistemologies. [5]

Although neither group explicitly discusses the implications of the North-South divide to the development of QR, their collective endeavor and intellectual trajectory are informative to the pursuit of QR from the Global South in a global era. Both groups derive their critical perspectives from their marginalized positions in relation to the "core," whether this core is seen as the Global North or Western-centered methodologies/epistemologies. Furthermore, both groups have evolved into vocal, dynamic subfields where their legitimacy and significance to the de-centering and decolonizing endeavor have been well articulated through a bottom-up approach that conceptualizes the margins as being fertile ground for locally grounded knowledge and theory. Pursuing social sciences from the Global South also entails an inward-looking effort to identify mechanisms in the periphery and/or across the core-periphery divide that continue to perpetuate the asymmetric North-South relationship in knowledge production (CONNELL, 2011; HANAFI, 2011; SINHA, 2003). [6]

In this article, I present an example of writing a locally grounded history of QR of the Global South by mapping out the history of social science inquiry in China. I demonstrate that rather than having two research traditions, as is the case in the United States, social sciences inquiry in China consists of three research traditions: the quantitative approach (introduced by Western-trained scholars),

the qualitative approach (similarly introduced), and *diaocha yanjiu*, 调查研究 [investigative research (IR)], a research tradition claimed as containing the Chinese socialist characteristics (GAO, 1987). IR is not an indigenous tradition reflecting ancient traditions but was introduced by MAO Zedong in the 1920s and was used extensively during the "Great Leap Forward" (1958-1962, GLF).<sup>2</sup> It nonetheless became embedded in the research culture and continues to influence the practices of both quantitative and qualitative approaches beyond the GLF as a hegemonic presence through discourse and institutionalized mechanisms. In its context, IR was a means of knowledge production that simultaneously embodied intellectual pursuit and state-building. [7]

I analyze two renowned cases where Chinese intellectuals were organized into investigative teams to conduct IR during the early years of the GLF<sup>3</sup>. To capture the tension between the intellectual and political attributes of IR, I address: 1. how investigative research was carried out at the individual and institutional levels; and 2. how investigative reports were constructed, presented, and interpreted. My analysis is guided by methodological and epistemological traditions of QR where the process, context, and results of the research undertaking are the subject of sociological interrogation in order to understand how knowledge is produced and "truth" constructed, contested, and/or certified (CHARMAZ, 2004; HEIMER & THOGERSEN, 2006; SMITH, 1999). My approach is in-line with scholarly efforts that examined the politics of knowledge production in nuclear science during the GLF and earthquakes monitoring during the Cultural Revolution (FAN, 2012; HYMANS, 2012). Thus, my article differs substantially from existing scholarship, in which specific historical events or empirical facts of China's GLF and the resulting nationwide famine are adjudicated.<sup>4</sup> By focusing on the practices and politics of IR during China's GLF, I identify MAO's IR as a means of inquiry even though it is underscored by ideological/political directives. Such a

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2 The Great Leap Forward was launched by MAO and the Chinese Communist Party (CCP) to foster a strong, modernized nation through increased collectivization, grain production, and industrial output. On one level, it stressed the superiority of Chinese Marxist society over capitalist America. On another, it intended to move China from socialism to communism by eliminating the market/capitalist economy and by undermining feudal structures at the local level. The CCP collectivized and organized communes as the basic units of production, with communal kitchens established to undermine individual households' productive functioning. The CCP also pushed forward a program of rapid industrialization and various agricultural and industrial experiments that destabilized rural life (CHAN, MADSEN & UNGER, 2009; FRIEDMAN, PICKOWICZ & SELDEN, 1991; THAXTON, 2008). To ensure that this massive program of change was successful, a nationwide campaign on conducting investigative research was launched to monitor information about the progress (or the lack thereof). For further discussion on the historical events of the GLF see GRAY (1990) and MEISSNER (1982).

3 Three differently positioned groups were involved in IR during the GLF: academics, bureaucrats, and members of the All China Women's Federation. While my on-going project examines the IR conducted by all three groups, this article addresses selected aspects of the IR conducted by the academics.

4 The nationwide famine is known as the Great Famine (1958-1961). It was caused by the Chinese Communist Party's GLF policies on drastic industrialization, agricultural collectivization, and bureaucratic mismanagement. While the CCP state used to employ the term "Three Years of Natural Disasters" to dismiss its own roles, it has now come to admit that the CCP's mismanagement was responsible for "70% of the famine, while the other 30% was the result of natural factors" (BO, 2008, pp.1023-1024). While scholars have used interviews, ethnographic study, and archival data to estimate the death toll, the exact number remains inconclusive, ranging from 15 to 45 million. For recent publications, see DIKOTTER (2010), LUO (2003), SONG and DING (2009), YANG (2008) and YU (2005).

conceptualization recognizes a local research tradition of the Global South that is outside of the dual (quantitative and qualitative) modes of social science inquiry which currently dominates the Global North. In conclusion, I will relate this case study to recent discussions on the globalization of QR (CHARMAZ, 2014; DENZIN, 2014; FLICK, 2014; HSIUNG, 2012). I will discuss the implications of IR for the practice and development of social science inquiry in China, present key issues in pursuing QR from the Global South, and articulate how such pursuit holds promise for undermining the north-south divide in social science inquiry in a global era. [8]

My analysis of IR during the GLF is partially based on recently published/printed memoirs of members from two renowned investigative teams described below. In their recollections, they corroborate their personal experiences of IR with publications, historical documents, or archival data that have become available in recent years. I also draw on insights and data I acquired through key informant interviews I conducted annually from 2011-2013 in Beijing with former investigative team members, their colleagues, and family members<sup>5</sup>. [9]

## 2. Social Sciences Research Traditions in China

Social science inquiry in modern China must be understood within the larger political and historical contexts in which the research was used not only as a means of academic knowledge production but also as a tool for social transformation and state-building. The quantitative approach was first introduced to China from the West in the early 1900s by Chinese returnees. It was used to explore urban poverty and the experiences of the underprivileged, whose realities were absent from traditional Chinese elite knowledge, and to develop interventions to address the problems (CHIANG, 2001; LAM, 2011). In the 1930s, the qualitative approach was similarly introduced by Western-trained social scientists to identify opportunities and develop urbanization policies in order to build a competitive urban-based political economy in the face of colonial forces (ARKUSH, 1981; YAN, 2004). Predating the introduction of qualitative research from the West by a decade, however, was an investigative paradigm exemplified by MAO's rural IR (see Section 3) in the 1920s that eventually brought about the Chinese Communist Party's (CCP) proletarian revolution of 1949 (GAO, 1987; MAO, 1986). The three research traditions coexisted until the People's Republic of China was established in 1949, after which quantitative and qualitative approaches were severely criticized because of their Western origins. They were ultimately replaced by MAO's methodological directives of IR. Quantitative research was not reintroduced until the late 1970s, while qualitative was only reinstated in the 1990s. [10]

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5 I spent a total of three months in Beijing, 2011-2013. I talked to twenty informants who had direct knowledge about the IR reported in this article. I carried out eight tape-recorded interviews. During my subsequent visits, I took notes, instead of using a tape recorder for our conversations. Topics covered in the interviews and conversations include, for example, their personal involvement in, observations of, and reflections about the IR. For this article, I mainly rely upon printed and/or published sources. In my subsequent writings, I will compare and contrast the written sources with the personal narratives I collected.

To date, no comprehensive history of social science inquiry in China has been produced. Studies about social science research in China have primarily focused on the era before 1949 (CHIANG, 2001; LAM, 2011; YAN, 2004). There are a few studies about social science research focusing on the 1950s, but these were conducted in the 1970s when researchers could only rely on investigative reports published in official (and therefore biased) sources such as *Hongqi Magazine* and *People's Daily* (LAU, 1974; YOUNG, 1974). Further, although some scholars have identified tensions between the CCP state and social science research (CHENG & SO, 1983), no in-depth examinations have focused on the practices and politics of MAO's legacy of IR and the implications of this method to the re-introduction and development of the quantitative and qualitative approaches in recent years. [11]

### 3. MAO's Legacy of Investigative Research

Three key directives have often been cited as defining IR. First, the *santong*, 三同 [three principles of togetherness] required investigators to develop a sense of camaraderie by "eating together, living together, and learning/working together"<sup>6</sup> with the informants. MAO (1986, p.24) argued that unless investigators were perceived as enthusiastic, humble, and willing to learn, they would not be able to carry out adequate investigative work and gain an insider perspective. [12]

Second, MAO stressed that investigators should never rely on existing written reports. He argued that investigators needed to be on site and in the midst of the issue under study, using an analogy of the difference between *zouma kanhua*, 走马看花 [browsing through a flowerbed on horseback] and *xima guanhua*, 下马观花 [getting down from the horse to take a closer look at the petals]. "Getting down from the horse" and *dundian* 蹲点 [squatting down], in research terms, meant immersing oneself in a local site over a long period (MAO, 1986, p.27). [13]

Finally, MAO emphasized the generalizability of case studies. To explain, he used another analogy: "dissecting a sparrow" (*jiepou maque*, 解剖麻雀). He used two popular proverbs to illustrate this concept: "even though the sparrow is small, it has all the organs shared by all birds" and "the crow is black wherever you go." MAO argued that it was not necessary to study the "big sparrow, small sparrow, Chinese sparrow, and foreign sparrow"—as the dissection of one sparrow provides information about all birds, an investigator only needs to study one example to understand the essence of related issues (MAO, 1964, p.20). [14]

At first glance, MAO's methodological instructions resemble the general principles of social science research. "Dissecting a sparrow" can be understood as an attempt to address issues related to sampling, representativeness, and generalizability in quantitative research. "Squatting down" parallels ethnographic fieldwork as conducted in QR. MAO's comments about how investigators should be immersed in the field are not dissimilar from the practices of empathy and

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6 All English translation from the Chinese sources is mine.

establishing rapport used in QR, as exemplified by MAO calling his informants "respected teachers" and referring to himself as their "disciple" (1982, p.16). [15]

In order to understand what made IR a research paradigm with "Chinese socialist characteristics," it is necessary to clarify how MAO's methodological directives have been employed in conjunction with Marxist-Leninist-Maoist ideologies as a means to advance the CCP's agenda in political struggles. The interconnectedness of MAO's directives and Marxist-Leninist-Maoist ideologies can be traced back before 1949. Throughout the 1920s and 1930s as the CCP tried out its revolutionary strategies in rural China, MAO (1964) wrote about the need for the cadres and commanders-in-chief to carry out investigations so that they would be fully in touch with the masses and local realities. He was livid whenever military/political setbacks were caused by reports and/or assessments carried out by inadequately trained cadres (ibid.). In 1930, MAO pronounced his infamous slogan, "no investigation, no right to speak" (没有调查, 就没有发言权) (1982, p.13). The embodied nature of CCP's state-building in IR was particularly evident when a year later, MAO revised the slogan to "without *proper* investigation, one still has no right to speak" (不做正确的调查, 同样没有发言权) (ibid.), even though it was never clear what a "proper" investigation exactly entailed in practice, and many of the first generation of socialist investigators were unclear as to how they were to simultaneously revamp "bourgeois sociology" and to contribute to state-building led by the CCP. [16]

IR conducted during the GLF constituted a key segment of a Chinese history of social science inquiry because it was sanctioned and practiced under the command of MAO and the CCP apparatus. Its importance was attested when MAO designated 1961 as "The Year of Investigative Research" (YANJIUSHI, 2013, p.34). IR remains prominently embedded in both the political and academic spheres in contemporary China. For example, it is not entirely surprising when Jingping XI, China's current President and General Secretary of the CCP, states that IR should be routinely carried out by rank-and-file bureaucrats (XI, 2011). The discursive, pervasive presence of IR as a means of producing officially sanctioned knowledge in the academic world is illustrated by on-going, deliberate effort made by committed intellectuals to assert dissident positions; for example, W. GAO (2006) and Y. GUO (2013) have endeavored to rewrite/rescue peasants' voices and lived experiences in what has been termed "from below."<sup>7</sup> Institutionally, the prominent and somewhat intimidating standing of the Chinese Academy of Social Sciences (CASS) as CCP's institutionalized think tank manifests IR's hegemonic status. The politics and contested nature of doing social science research in contemporary China is tellingly revealed when Xueyi LU, a renowned expert of rural sociology and the director of the Institute of Sociology in CASS (1988-1998), was unanimously commemorated for his unyielding effort in carving out and diligently negotiating intellectual space from

7 Wangling GAO's book (2006) is a historical ethnography on peasants' resistance and survival strategies during China's GLF. GAO documents not only resistance and attitudes among peasants, but also how he himself came to discover the truth from below. For a discussion of his methodology, see HSIUNG (2015). Yuhua GUO's book (2013) is an ethnographic study of peasants' lives in a village in northwest China. GUO's main objective is to re-write the People Republic China (PRC)'s revolutionary history using the lives and narratives of ordinary peasants.

within (SHEN, GUO & SUN, 2013). The politics of doing *critical* QR in contemporary China reveal the lasting effects of MAO's legacy (HSIUNG, 2015). [17]

The use of IR in the GLF particularly illustrates the tension between ideological and investigative impulses. The investigators themselves were caught between a commitment to the ideals of truthful reporting and the ideological imperatives of a rapidly changing political climate, especially after the Lushan Conference in June 1959<sup>8</sup>. A changing political climate intensified uncertainty about how to conduct research at individual and institutional levels, while the events at the Lushan Conference altered MAO's and CCP bureaucrats' interpretations of investigative reports. [18]

#### **4. The Great Leap Forward and the Political Context of Investigative Research**

In January 1958, the CCP launched their "Five-Year Plan" to advance industrial output and transform socialist China into a "communist utopia." The latter would be achieved through the process of mandatory agricultural collectivization, which the CCP launched in August 1958 by establishing communes as a means to explore ways to transform from a socialist to communist society (LIU, 2006). This announcement spurred a nationwide frenzy to move agricultural production units from small, family-operated plots of land to large, communal fields for which agricultural decisions would be made by the collective organization of the commune. At the same time public canteens were established. The CCP believed that collectivization would result in greater equity, and more importantly, increased productivity. [19]

These political campaigns and MAO's authoritarian rule put considerable pressure on rank-and-file and local cadres to showcase productivity increases and political progress. Under this pressure, they quickly resorted to dishonesty and corruption in reporting and showcasing the advancement, and in enforcing administrative orders from above. By early 1959, the CCP had become aware of widespread administrative abuses from various layers in the party hierarchy. MAO and the CCP's central committee sent out directives to alleviate the problems. The overall political climate in the early months of 1959 was therefore fairly receptive to skepticism and opposing positions about the effectiveness of communes and public canteens as advocated by the GLF. Nevertheless, though MAO and the CCP were willing to receive reports and consider viewpoints critical of communes and public canteens, they remained unwavering about leaping into communism in one step. [20]

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8 Between July and August of 1959, top CCP leaders gathered at Lushan, a scenic mountain resort in the Jiangxi province, to discuss the implementation and direction of the GLF. At the Conference, Dehuai PENG, the Defense Minister, wrote an open letter to MAO criticizing several key aspects of the GLF. This was the first time in the CCP's history that the leader openly disagreed with MAO's directives. PENG was purged and others who shared similar positions were condemned and/or demoted. For further discussion on the Lushan Conference and its implications, see LI (1999).



This relative openness ended in July 1959, when the Minister of National Defense, Dehuai PENG, openly challenged MAO and his approach to the communist transformation during the Lushan party conference. After this public confrontation, MAO condemned any viewpoints that he considered to be critical of collectivization and the public canteens. This immediate change in the political climate, from tolerance to a crackdown on any criticism of collectivization, had severe repercussions; investigative researchers whose reports documented local problems found themselves labeled "right-leaning opportunists" and they were harshly punished. [21]

## 5. Changli and Liangxiao Investigations

During the roll-out of collectivization, intellectuals were organized to carry out IR to assess the reform and to renew the existing knowledge in social sciences. The Changli and Liangxiao investigations were the most well-known because they were carried out by researchers in the most prestigious research institutions in China. The Changli team was organized by the Department of Economy in the Philosophy and Social Science Division at the Chinese Academy of Science, the highest ranked science institute in China. The team was named after the county of its research site, which was about a hundred and twenty miles from Beijing. The Liangxiao investigative team of 162 members was comprised of two universities: the Peking University and the Chinese People's University. In addition to one international student from Russia and two international students from Vietnam, the members consisted of chairs, junior instructors, graduate students, and fourth-year undergraduate students from the departments of law, economics, finance, philosophy, and political science. This team was divided into three groups, which went to Xinyang and Lushan counties in Henan province and Gaocheng county in Hebei province, in November 1958. Investigation in Xinyang county turned out to be especially significant because Xinyang was one of the regions hit the hardest by the Great Famine (DIKOTTER, 2010; LUO, 2003; SONG & DING, 2009; YANG, 2008; YU, 2005). [22]

As recalled by a member of the Changli investigative team, the objective of the investigations was to "explore how social sciences could serve the economic transition, to alleviate research capacity of economics through applying [Marxist-Leninist] theory to reality and to gather primary data and to accumulate practical experiences" (JING, 2005, p.58). For the Liangxiao investigative team, its aim was to "carry out a comprehensive investigation on communalization, gather [new] knowledge to advance teaching and academic research, and offer our investigative reports as tributes to celebrate the tenth National Day" (LI, 2009, p.12).<sup>9</sup> The ideas of truth-seeking in combination with political aspirations were apparent at the lavish departure party held in Beijing for the Liangxiao investigation team, which was organized by the party secretaries from Peking University and the Chinese People's University. Lufeng ZOU, the vice-president of Peking University and the administrative director of the investigation, gave a

9 October 1 is the National Day of the PRC. National and local celebrations are held yearly to commemorate the establishment of the PRC. The National Day of 1959 was the tenth National Day since the PRC's establishment in 1949.

keynote speech, in which he asked the team members to diligently follow MAO's methodological directive of the "three togetherness" (LI, 2009, p.12). [23]

Starting in November 1958, the Changli investigative team spent six months at the research site, and produced two investigative reports. The first report not only documented widespread abuses among local officials; it also specifically recommended measures to stop the extreme, radical move toward the communist utopia. When it was delivered to MAO in late April 1959, MAO commented that "the situations in Changli and the report's recommendations have general appeal" (JING, 2005, p.58). Most significantly, he demanded that the report and his own handwritten comments be reviewed by CCP secretaries and distributed to party secretaries at the provincial, county, and regional levels as well as to the administrative party secretaries of every production brigade nationwide. He instructed local party secretaries to address the documented problems, "the sooner, the better" (ibid.). [24]

On May 7, 1959, the Changli team was elated to learn of MAO's approval and the impact of its report (JING, 2011). Based on this early approval, the team leader, Qian DONG, instructed team members to carry out additional investigations, specifically about the public canteens. DONG (1998) laid out four guidelines: that the investigative team must use reliable materials; affirm advancements already achieved; acknowledge existing problems and offer possible solutions; and complete its investigation in a timely manner. Four days later, the investigative team submitted its second report, documenting the problems observed in the public canteens. However, it did not reach MAO until after the change in political climate following the Lushan Conference. It was, then, condemned and its findings were dismissed for being overly negative and for the limitations of its scope (i.e., one county). The investigative team was denounced and became the target of political criticism during the subsequent "anti-right leaning opportunist" campaign.<sup>10</sup> A new investigative team, which included some of the original team members, was sent to re-investigate the matter (LIU, 2007). [25]

At approximately the same time as the Changli team was finishing its second report, the Liangxiao investigative team was completing its investigations having also spent six months at its research sites. Beginning in May 1959, the team met at the Peking University for two months to discuss its observations, deliberate on the findings, and draft its final report. The report, like the Changli reports, included a number of observations that were critical of the public canteens and the effects of collectivization (LIU, 2006). Because the report was also not received until after the July 1959 Lushan conference, the Liangxiao team was persecuted and the report was used as hard evidence against the team members (CHEN, 2004). All members were instructed to write confessions and documents of self-criticism for having committed "ideological mistakes" (LIU, 2006, p.60). [26]

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<sup>10</sup> After the Lushan Conference, MAO and his top followers pushed their policies to the extreme. Any bureaucrats or intellectuals who expressed comments or positions that were perceived as differing from MAO's directive were labeled as "right-wind leaning opportunists."

The "rehabilitation" of the Liangxiao team included a requirement that members return to their original investigative sites to discover "the superiority of the people's commune" (LI, 2009, p.12). When the team members returned to Xinyang county, they found that the locals had already suffered from severe famine; they saw widespread malnourishment and death from starvation—people went hungry, ate roots and leaves, and were affected by edema. Nevertheless, none of these observations and experiences were included in their new report, which applauded the commune's supremacy and praised the public canteens' contribution to the communist utopia (LI, 2009). [27]

## **6. Practicing Investigative Research during China's Great Leap Forward**

The empirical evidence presented above suggests that IR carried out during the GLF was administrated by MAO and the CCP apparatus as a tool of political intervention. Nevertheless, it was also perceived and employed by the investigative teams as a means of discovering, assembling, and presenting the "truth." This section analyzes the embedded tensions between truth finding and political intervention in practicing IR by examining what it means to carry out IR at the individual and institutional levels and how reports are constructed and interpreted. [28]

### **6.1 Doing investigative research at the individual level**

Based on the objectives described above, investigative teams were called upon as the first generation socialist investigators to use their intellectual capabilities to strengthen academic research and teaching capacities and to advance the CCP's political agenda in state-building. The researchers saw this as an opportunity to transform academic knowledge by incorporating and reinterpreting previously excluded or neglected components of the social world through Marxist-Leninist-Maoist lenses. They were also eager to see their investigative endeavor contribute to the political transition from socialism to communism. Ongoing debates about how China could move from a socialist economy to a communist utopia suggested that intellectuals could make a real difference in state-building. The researchers assumed that information about peasants' lives, their incomes, and the daily operations of local communes and public canteens would be useful to policy-making. They saw their efforts as similar to those of previous generations of intellectuals, which were intended to eliminate human suffering and societal problems. [29]

However, their intellectual enthusiasm was also subjected to a watchful undercurrent. After being through many political campaigns, some members of the investigative team understood the political nature of the investigation and its risks. The Changli investigative team's exultation over MAO's positive appraisal demonstrates the political overtone of IR conducted during the GLF. When recalling the incident, team members referred to an enormous sense of relief, excitement, and vindication. They were relieved because MAO was receptive to their critical assessments of the communes, and excited by the fact that MAO had

instructed that their report, along with his positive appraisal, be distributed to the secretaries and every level of the CCP administration. That MAO ordered to address the problems identified in the report "the sooner, the better," they interpreted as buttressing their commitment to state-building (JING, 2005, p.58). This mixture of relief and excitement overcame their political caution, as evidenced by the team leader's instructions for the second report, which reflected more of a truth-seeking mission than a politically underscored undertaking. As a result, they were completely shocked when their second report was denounced and individual members were prosecuted. In their memoirs and interviews, members of the Changli and Liangxiao investigative teams stated that it had taken them decades to learn about the Lushan Conference and why their investigative work was "cast as a politically motivated undertaking" (WANG, 2005, p.16). [30]

MAO's emphasis on squatting down and laboring side-by-side with peasants is repeatedly referenced as one of the guiding principles of IR. During the GLF, doing IR at the individual level meant physically engaging in long periods of labor in the countryside. However, it was unclear whether engaging in long periods of physical labor in the countryside would inevitably lead to an epistemological shift in which a researcher's "intellectual chauvinism" would be replaced with an empathetic understanding of peasantry through Marxist-Leninist-Maoist lenses. Also, no individual researcher was immune from prosecution and/or persecution due to changes in the political climate. [31]

In fact, doing physical labor in the countryside was not simply a research directive: it was a coercive device used by the CCP to discipline the intellectuals' body and mind. When the investigative mission was organized, many faculty members and students had either just completed or were currently engaging in physical labor and "thought reform" in the countryside. Zisong WANG, the leader of the Changli Team, recalled being repeatedly criticized and denounced publically for failing to understand and follow the CCP's political order. When he heard about the new initiative, he eagerly joined the investigative team to "catch up" and bring his body-mind into alignment (2005, p.14). After the political fallout of 1959, the confessions and self-criticisms written by team members were similar to those produced during the CCP's political struggles; in an interview I conducted, one team member called such writings *luanzheng*, 乱整 [rubbish] and *qiangjia de ziwo pohai*, 强加的自我迫害 [externally imposed self-prosecution]. Selected members of the investigative teams were sent back to re-do their investigation at the original sites, which was regarded as a disciplinary measure rather than a methodological directive (LI, 2009). [32]

## 6.2 Doing investigative research at the institutional level

The political nature of IR at the institutional level is evident through the CCP's prominent presence from the outset. For both investigations, the CCP's party apparatuses and various administrative units were involved in the establishment of the investigative teams, selection of members and sites, and development and approval of the research objectives. For example, although the Changli

investigative team was mainly composed of Department of Economics faculty, the undertaking was jointly approved by the Division of Social Sciences at the Chinese Academy of Science and the Central Bureau of Propaganda. The investigative site was also chosen and approved accordingly (JING, 2011). [33]

Once the investigative teams arrived at the selected sites, the CCP's institutional capacity was activated to facilitate the IR. Upon their arrival, the team leaders of the Changli and Liangxiao investigation were assigned administrative duties and official titles (CHEN, 2011; JING, 2011). Although these arrangements gave the investigative team direct access to the daily operation of the local bureaucratic system, it did not mean that learning and reporting local realities were a straight forward matter. For example, Zisong WANG, the chair of the Philosophy Department from Peking University recalled an encounter where local officials deliberately concealed local realities through media production and fabricated statistical data. As the Liangxiao deputy team leader, Wang went with his supervisor to Gaocheng county to make pre-arrangements, and they visited the county's exhibition gallery showcasing its achievements during the GLF. WANG was stunned by a photo that showed a "gigantic sweet potato bigger than a staircase."<sup>11</sup>



Figure 1: A photo composite of the Great Leap Forward exaggerating the rice production<sup>12</sup>

11 Flyers and composite photos were produced to showcase the extraordinary results of the GLF. One of the underlying themes was disproportionate agricultural outputs, both in physical size and quantity. An acre was said to produce a thirty seven thousand kg of rice.

12 This image is one of the most infamous photo composites of the GLF. It shows that the rice stocks were so thick and dense that children could stand and jump on them. The photo was originally published in the *People's Daily* in the summer of 1958; it was subsequently re-published nationwide. The included image is from a report in *Zhongguo qingnian* 中国青年 [China Youth] (CHEN, 2009). It was written by Tong CHEN who made a trip to the original village in Macheng county, Hubei province, where the photo was taken in 1958. The report details how despite the fact that almost everyone in the village knew about the photo, the reporter was unable to track down the four children featured.



Figure 2: Promotional drawings of the Great Leap Forward<sup>13</sup> [34]

He later wrote:

"We first visited the 'Exhibition Centre of Great Leap Forward.' We were very encouraged and excited by the displayed statistics, tables, graphics, and agricultural products. However, there was a photo with a sweet potato at the center and a stepladder leaning against it and a person standing on its ladder. The photo shows that this person was not even half the size of the sweet potato. I was puzzlingly surprised and asked the staff there: 'Is the sweet potato really that gigantic?' The staff replied with a gentle smile, 'The photo is a composite done in a studio' (WANG, 2005, p.14). [35]

WANG noted that he and his supervisor "left the Centre with many unanswered questions" (ibid.), yet the supervisor repeatedly instructed his team members to follow two practical guidelines: "searching for the truth" when doing IR; and being "cautious and vigilant" when dealing with local cadres (ibid.). According to WANG, his supervisor's dual approach demonstrated his unwavering pursuit of "truth" as an academic and his pragmatic practice as an administrator with years of experience living through political campaigns and purges (ibid.). [36]

Once they started "eating, sleeping, and working" alongside villagers, the investigative team realized that they were not alone in needing to manage the gap between "knowing" and "presenting." Local villagers also had to be vigilant about when and to whom they could reveal their "knowing":

<sup>13</sup> This figure includes five drawings. The top image shows that three children are needed to carry just one stock of wheat. At the bottom left, two adults carry one green vegetable. In the middle of the bottom row, a child stands in a boat-sized squash. Finally, the bottom right shows a baby acting as a counterweight for a green bean and a child carrying an apple nearly as large as her (ZHONGYANG MEISHU XUEYUAN, 1959, p.28).

"Once we started our work, the most notable, repeated report from our team members had to do with their conversation with the villager: when they asked the villager about productivity levels, the villager would say, 'Do you want me to tell you the *correct* answer or *real* answer? If you want to know the *correct* answer, then it would be two thousands grain per mu.<sup>14</sup> The *real* answer would be two hundred grain per mu" (ibid.). [37]

Local discontent was widespread regarding daily consumption and public canteens, the symbol of communist utopia. The investigative team noticed that because the reported productivity level was many times higher than the real production and that the local grain got sent up and away many times more than in the past years, there was no wheat flour left even just right after the harvesting season. All the villagers had breads made of sorghum and other grains (ibid.). The team also learned that public canteens actually had negatively affected agricultural production. [38]

Nevertheless, because MAO and the CCP regime steadfastly upheld their utopian fantasy amid human suffering, a bureaucratic practice was set up to suppress discontent. For example, as one component of "political education," gatherings and meetings were occasionally organized for villagers and lower-level cadres to study official documents or publications (JING, 2011, p.497). These local "public debates" were in fact used deliberately to silence any discontent; individuals who expressed dissenting voices were criticized or labeled as being politically motivated. [39]

The political nature of IR at the institutional level is the real issue here. The CCP apparatus facilitated the researchers' truth-seeking endeavor by integrating them into the administrative system. The researchers soon came to realize that the institutions which had facilitated their research endeavor were the same ones that had fabricated statistics and silenced local discontent. Through squatting down in a local site and laboring alongside the peasants, researchers not only uncovered concealed realities and silenced local discontent: they also realized that they needed to manage the gap between "knowing" and "presenting." [40]

### **6.3 The politics of constructing investigative reports**

Even though the investigative process was rather contentious, the first two reports produced by the Changli team still provide much insight into communalization and public canteens<sup>15</sup>. For example, the first Changli report details how unrealistic production quotas imposed from the top hindered peasants' incentives in agricultural production because their basic consumption need was compromised. This unsettling situation was compounded by local cadres who relentlessly confiscated local grain that was being withheld for local,

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14 Mu (畝) is the Chinese area unit of measurement. One mu is roughly equivalent to 666 square meters, or 797 square yards.

15 The Changli team produced three reports, two are accessible. None of the reports produced by the Liangxiao teams are currently available.

daily consumption, which resulted in widespread hunger (WANG, 1958). The second Changli report discussed how the public canteen not only had failed the CCP's expectation but created unexpected negative effects. For example, the household chores had generally been carried out by retired elderly women, and the able-bodied women had already joined the agricultural labor before the organization of the public canteen. Therefore, the public canteen had not led to an increase in female labor force participation as anticipated by MAO and the CCP. Furthermore, it was, according to this report, detrimental to household poultry and raising pigs because kitchen waste was no longer available (JING, 2011). [41]

The contentious nature of IR lies not solely in what is included in the reports but the negotiated process of report construction, which entailed an interactive and intensive process of interpretation and decision-making. Investigative teams routinely gathered, disseminated, interpreted, and discussed the viewpoints from upper-level bureaucrats, especially MAO. Their reading and assessment of the "official position" was then factored into methodological decisions such as how subsequent IR would be carried out, what information would be included in the final report, and how the report would be written up. As mentioned above, MAO's positive reception to the first Changli report encouraged the team leader to instruct his team to study problems related to the public canteens. This interactive process of assessing the official position and subsequent methodological decisions was captured by Junjian JING, an economist who drafted the second Changli report. In his recollection of a crucial meeting on May 7, 1959, when his team learned of MAO's appraisal, he not only remembered the exhilaration, but also comments made by team members and local officials about problems related to the public canteens. The decision to fully explore and eventually expose these problems was made because the team leader "indicated that since the Central Office was seriously considering problems aroused by the public canteens, the team should report on the observed problems in a timely manner" (JING, 2005, p.58). [42]

The report construction was a collective, rather than an individual endeavor. The Changli team finalized its second report after rounds of internal deliberation. The report was then handed to the Department of Economic, the team's host institution which organized a special meeting to openly discuss the report. Leaders from the key administrative units, such as the Central Bureau of Propaganda and the Division of Social Sciences at the Chinese Academy of Science, collectively approved the report at the meeting. It was then sent up for approval from an upper tier of administrative units including the Central Bureau of Propaganda, the Division of Social Sciences at the Chinese Academy of Science, the Provincial Party Committee of the Hebei province, Tangshan Prefectural Party Committee, and Changli County Party Committee. When the report was published as a Central Bureau of Propaganda's internal publication, it was not under the name of Junjian JING, who drafted the report, but of "the Changli Investigative Team of the Economic Department at the Chinese Academy of Science" (JING, 2011). The Liangxiao investigation went through a similar



process of internal deliberation and external approval in producing the report (CHEN, 2011). [43]

A focal point in the deliberation and approval was the report's wordings; words and phrases were vigilantly discussed to ensure proper interpretations upon its superior's readings. The second report of Changli investigation is illustrative. Even though the Changli team was encouraged by MAO's appraisal of its first report, they were being careful in choosing a "neutral," impartial stance to present their second report (JING, 2005, p.59). When the report was published, although the content of the original report remained unchanged, its title and subtitles were altered, presumably by someone within the CCP bureaucracy. To this day, many team members attribute the denunciation of their report to the unilateral editorial changes made to the report following its submission. They resent the fact that the report's "neutral" title, "Several Problems Concerning the Public Canteen," was changed to a "critical" and "doubtful" one: "Is the Public Canteen Truly Superior?" (ibid.) They listed the startling differences between the original (on the left) and new subtitles (right) (DONG, 2009; JING, 2005):

Public canteen and releasing women's labor force	Public canteen did not free up women's labor
Public canteen and grain consumption	Wasting grain
Public canteen and slops	Making it impossible to raise livestock
Public canteen and fuel	Fuel shortage
Dining hall	Appropriating dwellings and burdening villagers
Public canteen and collective living	Upholding the collective at the cost of individual freedom
Public canteen and management	Lack of management experiences [44]

It is not clear why the "neutral," impartial title and subtitles were changed. Nor is it possible to guess why the editor was able to later escape political fallout. The fact that the team members still attribute the team's fallout to the report's wording speaks volumes about the politicized aspect of IR. [45]

## 7. Conclusion

In order for the Global South to produce its own QR rather than be a field of QR research conducted by researchers exclusively from the core, writing locally grounded histories of QR of the Global South is essential. Not only will this process de-center the genealogy of QR from the Global North, but it will also cause scholars from the Global South to take stock of local traditions, thus providing entry points into in-depth analysis about methodologies, epistemologies, and research methods from the Global South. Locally grounded history of social sciences inquiry can also provide meaningful and relevant materials for the teaching and learning of QR in the Global South that can

complement, if not completely replace, English-translated textbooks and publications originating from the Global North. [46]

Advancing QR in the Global South must take a bottom-up approach that is informed by local methodologies, epistemologies, and research practices. For example, although reflexivity has been upheld as one of the key concepts in practicing QR in the Global North, it may have a completely different meaning when it is exercised in the Global South. The political and criminal connotation of confession and self-criticism demanded of researchers participating in the IR during China's GLF is informative in this regard. Rather than reflecting on their relationship with the subject/informant, as has been advocated currently in the Global North, researchers need to expand their reflective exercises centering on the state and political regime. Such exercises not only are applicable to researchers in authoritarian and developmentalist regimes in Africa, Latin America, and USSR, incidents such as the US "Project Camelot" in the early 1960s<sup>16</sup> and recent muzzling in scientific research in Canada point to their relevance to the Global North. Thus, pursuing QR from the Global South holds promise for furthering the de-centering and decolonizing endeavor if the Global North also begins similar inward looking exercises about its history by interrogating its own assumptions and practices that have remained unexamined. [47]

In the case of China, MAO's legacy of IR positions prominently in China's history of social science inquiry. IR conducted during the GLF constitutes a significant segment of this history. The Changli and Liangxiao investigations demonstrate how intellectuals were caught between intellectual pursuits and CCP directed state-building. Because the CCP state continues to play a vital role in knowledge production, IR's hegemonic status must be recognized and examined. Notably, when sociology was re-instated in 1979, Xiaotong FEI, the renowned sociologist and student of MALINOWSKI, led the entire discipline to embrace a "scientific," "objective," quantitative approach reintroduced through training workshops taught by American sociologists and Chinese diaspora-scholars: While the phrase *buke*, 补课 [catching up] was repeatedly used to underscore the "coming of spring" for sociology, their embracing of the quantitative approach was driven by the longing for its "objective," "scientific" promises, with no attention directed to the approach's positivistic attributes (FEI, 1994). Likewise, after QR was re-introduced in the 1990s, doing QR in contemporary China entails not only employment of research techniques but carving out critical space in the midst of a hegemonic discourse (HSIUNG, 2001, 2015). As quantitative and qualitative approaches gradually take root in China, the initial sites of re-encounter between IR and these two approaches and their subsequent interplay warrant further research for they comprise essential aspects in the Chinese history of social science inquiry. [48]

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16 Project Camelot was a social science project sponsored by the United States Army in 1964. Its objective was to assess the causes of violent social rebellion and to identify the actions a government could take to prevent its own overthrow. It was canceled a year later, after the revelation of the relationship between American politics, military patronage, and American social science. Nevertheless, scholarly works suggest that such relationship continues, though it may be more covert. For Project Camelot and its related discussion see HOROWITZ (1967), ROHDE (2013) and ROSS (1991).

## Acknowledgments

This project is funded by the Chiang Ching-kuo Foundation for International Scholarly Exchange (USA) (RG013-A-11). It receives ethical approval from the Office of Research Ethics, University of Toronto, Canada (#28064). I thank students Hank ZHAO, who provided research assistantship at different stages of the project and Yu WANG, who helped track down several sources and the included photo composite. I also thank Sherri KLASSEN and Linn CLARK for their editorial support. Yongyi SONG has been extremely generous in sharing with me archival documents on the Great Leap Forward that he and his colleagues have collected. Meeishia CHEN, Yuesheng WANG and Weiguo ZHANG help put me in touch with members of the investigative teams during my initial field trips to Beijing, China. I owe deep debts to several key members of the investigative teams who have shared with me their experiences, insights, and unpublished memoirs. I hope I have fulfilled their trust in "getting the stories right." I thank anonymous reviewers at FQS. My special thanks go to Katja MRUCK, FQS' main editor, for her meticulous editorial skills and enduring patience to ensure that I correctly put together the Chinese characters and their English spelling. I take full intellectual responsibility for my positions.

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<sup>18</sup> This is an unpublished document. It was made available to me by an anonymous informant during my second visit in 2012. Based upon the informant's status in relation to the investigation, I consider this a creditable document.

## Author

*Ping-Chun HSIUNG* conducts research on the politics, mechanism, and engendered process of knowledge production and ignorance perpetuation in local and global contexts. She has facilitated and contributed to critical dialogue across the core/periphery, Aboriginal/non-Aboriginal, and science/social sciences divides to advance the interpretative paradigm of social science inquiry. She is currently carrying out two studies. Through historical ethnography, archival research, and in-depth interviews she examines how investigative research was conducted, findings constructed, and policies derived during China's Great Leap Forward (1958-1962), which result in the great famine and 15-45 million deaths. Working with women's NGOs, she analyzes how rural women's participation to local governance is facilitated through transforming cultural and political practices in contemporary China (1995-2015).

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## Citation

Hsiung, Ping-Chun (2015). Pursuing Qualitative Research From the Global South: "Investigative Research" During China's "Great Leap Forward" (1958-62) [48 paragraphs]. *Forum Qualitative Sozialforschung / Forum: Qualitative Social Research*, 16(3), Art. 2, <http://nbn-resolving.de/urn:nbn:de:0114-fqs150325>.