

亞洲價值

2013 ART TAIPEI FORUM 台北藝術論壇

ASIAN VALUE



2013 ART TAIPEI FORUM 台北藝術論壇

004	序文	2013 台北國際藝術博覽會 執行委員會召集人	150	150
010	論壇介紹			
010	主要議題	城市藝術經濟力 企業藝術經濟力 學術論文發表	158	
012	論壇議程		158	
016		場次 1 城市藝術經濟力 - 文化關鍵		
016		德國礦業同盟工業文化園區 - 新魯爾博物館 尤里奇·伯斯多夫	164	
022		與談人 林崇傑	164	
024		主持人 吳介祥		
026		場次 2 學術論文場次 - 產業環境與趨勢研究	178	
026		從廢校轉變為藝術空間 - 臺灣與日本案例的觀察 談宜芳	180	
070		藝術品網路交易平台：亞洲華語市場與 西方市場初探分析 林牧葶、張乃予	180	
100		主持人 約普·德容	186	
102		場次 3 學術論文場次 - 藝術市場 - 量化與質化調查分析	188	
102		藝術行政 - 藝術這門行業 派特·維勒尼芙	190	
116		東亞藝術在倫敦 - 以中國當代藝術一級 市場為主要關注 蕭雅文	192	
148		主持人 印永翔		
		場次 4 全球藝術市場報告 2012-13 全球藝術市場報告， 展望 2014 年及未來藝術 市場走向 詹姆士·古德溫		
		場次 5 亞洲文化自由港的 趨勢與戰略 免稅而多元的視覺藝術品服務平台： 下一步是什麼？ 東尼·雷納德		
		場次 6 企業藝術經濟力 Art Works - 德意志銀行的全球藝術計劃 弗理德 海姆·胡特 主持人 劉奕成		
		場次 7 ArtPP - 藝術市場的 數位行銷與統計分析 ArtPP - 藝術市場的數位行銷與 統計分析 石隆盛		
		場次 8 亞洲價值 - 專題座談 與談人 長谷川智惠子 與談人 張學孔 與談人 Andreas HECKER 主持人 陳韋晴		

006	Preface	The Convener of 2013 Art Taipei Executive Committee	150	Session 4 Global Art Market Report
011	Introduction		153	Global Art Market Report 2012-13 Looking to 2014 and Beyond James GOODWIN
011	Themes	Urban Art Economy		
		The Value of Arts for Business and Institutes	158	Session 5 Culture
		Thematic Paper Session		Freeport in Asia: Trends & Strategies
014	Programme		160	Tax-Free Multi-Service Platforms for Works of the Visual Arts: What's next? Tony REYNARD
018		Session 1 Urban Art Economy – Culture is the Key		
018		The New Ruhr Museum at Zollverein in Essen Dr. Ulrich BORSODORF	164	Session 6 The Value of Arts for Business and Institutes
023		Panelist Chung-Chieh LIN		Art Works – The Global Art Program by Deutsche Bank Friedhelm HÜTTE
025		Moderator Dr. Chieh-Hsiang WU	170	Moderator I-Cheng (I.C.) LIU
026		Session 2 Paper Session I – Industrial Environment & Trends	179	
046		Transforming Closed Schools into Art Spaces - an observation on Taiwan's and Japan's Current Conditions Yi-Fang TANG	180	Session 7 ArtPP: Digital Marketing & Statistical Analysis for Art Market
086		The Platform of Online Art Trading: An Initial Analysis between the Asian Chinese-speaking Market and Western Market Mu-Ting LIN · Nai-Yu CHANG	182	ArtPP: Digital Marketing & Statistical Analysis for Art Market Long-Sheng SHIH
101		Moderator Dr. Joop de JONG	187	
102		Session 3 Paper Session II – Art Market - Qualitative and Quantitative Analysis	189	Session 8 Asian Value - Panel Discussion
		Arts Administration - The Business of the Arts Pat VILLENEUVE	191	Panelist Chieko HASEGAWA
108				Panelist Richard CHANG
		East Asia Art in London - With Main Concerns on the Primary Contemporary Chinese Art Market Ya-Wen HSIAO	193	Panelist Andreas HECKER
134				Moderator CHEN Wei-Ching, Joanne
149		Moderator Dr. Yung-Hsiang YING		

亞洲價值—— 全球藝術市場成長的主要驅動力

近年來全球藝術市場持續聚焦亞洲，除了本身的經濟成長強力助長了藝術浪潮，國際頂尖畫廊和知名藝術博覽會紛紛東來，亞洲藏家也屢次在拍賣場中展現做人實力，促使國際拍賣公司積極在此布局，繁盛的景象改變了以歐美為藝術中心的傳統思維。同時，在此去中心化的趨勢下，亞洲多元豐富的文化底蘊也激發出更多樣化的藝術創作，與活躍的交易市場形成動能豐沛的良性循環，在在都彰顯了亞洲作為目前全球藝術市場主要驅動力的重要價值。

「2013 台北藝術論壇」即以「亞洲價值 Asian Value」為年度主題，首先由德國魯爾博物館館長尤里奇·伯斯多夫博士和台北市都市更新處林崇傑處長，以「城市藝術經濟力—文化關鍵」為題，以魯爾工業區礦業遺址再利用的經典案例，對照台灣文化古蹟保存與工業地景再生的現況，並與視覺藝術協會吳介祥理事長一同以在地參與、人本思考以及跨界創新為出發點，探索老舊建物在保存、開發與更新之間的各種可能，重新發掘亞洲後工業都市的藝術經濟潛力。

近來，企業界對於的藝術收藏與贊助已蔚為一股風潮，藉由「藝術倡議 (ABIs)」的實踐，在提升品牌形象與營運績效的同時，也為藝術家帶來實質的助益，創造了互惠的成功模式。德意志銀行多年來秉持著「藝術能驅動世界，為社會帶來正面能量」的信念，積極推動多面向的藝術收藏與贊助計畫，可謂企業贊助藝術的最佳典範。在「企業藝術經濟力」的專題中，德意志銀行全球藝術部總監弗理德海姆·胡特與英商巴克萊銀行台北分行投資銀行部董事總經理劉奕成，將就德意志銀行富有盛名的藝術贊助計畫進行多方剖析，期盼藉此交流，在國內激發更多藝企合作的想像，讓台灣企業也能在其中開創出兼顧文化與經濟價值的嶄新藍海。

在「全球藝術市場報告」的單元，國際藝術市場專家詹姆士·古德溫，將從藝術市場歷史、價值評估與稅務法律等方面切入，同時考量政經科技等外部宏觀環境因素，分析形塑目前全球藝術市場的原因以及未來的發展趨勢，並探討此趨勢對於台灣乃至於亞洲

市場的影響，作為藝術從業人員和機構因應未來局勢變化的參考。

自 2010 年起，仿效香港經貿條件的文化自由港已陸續在新加坡和北京成立，上海亦將文化產業列入自由貿易區重點項目，在亞洲各國力求消弭藝術品關稅稅負限制的同時，置身於外的台灣是否能在亞洲縱貫線上保有立足之地？在「亞洲文化自由港的趨勢與戰略」的場次中，新加坡自由港房地產管理有限公司主席東尼·雷納德將從其集團在全球綿密布局文化自由港的視角，為與會者剖析這個攸關整體視覺藝術產業發展的重要趨勢。

今年首度開闢「學術論文場次」，與國立台灣師範大學管理學院以及荷蘭馬斯垂克大學藝術與社會科學院合作，結合產業與學術領域之創新元素與資源，推動跨領域的交流對話，期能促進視覺藝術產業的永續發展。在此場次將公開發表四篇涵蓋「閒置空間再利用」、「藝術品電子商務」、「藝術行政管理」以及「東亞當代藝術市場」等不同面相的論文，企盼在未來建

立起全球性視覺藝術產業學術論文固定的發表與交流平台。

最後，在「亞洲價值」單元，呼應年度主題，邀請了多位深耕亞洲藝術市場的國內外知名畫廊業者，就藝術創作和藝術市場兩大方向，共同探討亞洲藝術環境現況，同時也與其涉足歐美藝術市場多年的經驗比較，從中發現亞洲藝術未來的挑戰與機會，使亞洲價值能持續擴大創新。

「台北藝術論壇」是國內少數兼顧學術與市場的國際型藝術研討會，聚集國內外產業代表與專家學者，系統性地介紹豐富異質的亞洲藝術文化，以及市場與產業的多元觀點，竭誠邀請您一同與我們構築串連亞洲與國際藝術世界的平台。

張逸群

Asian Value - The Key Growth Driver for Global Art Market

In recent years, Asia continues to be the focus of the global art market. This art wave benefits greatly by not only the significant regional economic growth, but the eastern expansion of many prominent international galleries and leading art fairs. Additionally, the proactive field development in Asia of international dominant auction houses fueled by Asian collectors' impressive purchasing power also contributes to this strong emerging art market. Such vibrant arts scene challenges the traditional Western-centric view in the art world, and under this market trend toward decentralization, the rich diversity of Asian culture stimulates a more varied artistic offer, generating a dynamic virtuous circle together with the booming market. All of this once again demonstrates the value of Asia being the key growth driver for the global art market.

With "Asian Value" as the theme of the year, in the first session of the 2013 Art Taipei Forum "Urban Art Economy – Culture is the Key," Dr. Ulrich BORSODORF, Director of the new Ruhr Museum, and LIN Chung-Chieh, Director of Taipei City Urban Regeneration Office, are invited to share the classic case of reusing the local mining ruins in former industrial area in Ruhr region, and to compare it with Taiwan's current situation of cultural heritage preservation and renewal of industrial landscape. They are then joined by WU Chieh-Hsiang, Director of Association of the Visual Arts in Taiwan, using local participation, humanitarian concepts and interdisciplinary innovation as a starting point to explore the old buildings conservation, development and possibilities for renewal, while rediscovering the unique economic impact of post-industrial cities in Asia.

It has become a trend that international corporations collect and sponsor in art over the past several years. By implementing “Art-Based Initiatives (ABIs),” corporations can enhance their brand image and operation performance and also bring about actual assistance for art practitioners at the same time, successfully creating a mutually beneficial, win-win model. Embracing the belief “Art Works” - art can motivate the world and produce positive impacts on the society, Deutsche Bank has been committed to contemporary art in terms of collection and sponsorship for decades and is regarded as the best contemporary exemplar of corporate sponsorship of art. In view of this, in the session “The Value of Arts for Business and Institutes,” Friedhelm HÜTTE, Global Head of Art at Deutsche Bank AG, and LIU I-Cheng, Managing Director in Investment Banking of

BARCLAYS Bank PLC Taipei Branch, to provide the systematic analysis of Deutsche Bank’s prestigious arts sponsorship programs in the hope that through this exchange of experience, it would inspire more collaboration between art and businesses in Taiwan, where local corporations tempt to explore a brand-new Blue Ocean Strategy that creates both cultural and economic value.

In the session “Global Art Market Report,” art market specialist James GOODWIN brings the most updated critical analysis of how the art market nowadays is shaped, by examining literature on art market history, art value as well as tax and law, where factors such as politics, economy and technology are also included in the study. This lecture also aims to gather the trends analyzed for demonstrating how these



trends will affect Taiwan and Asian art market, and for envisaging scenarios for the art market in next decades, in the interest of better decision making today for our tomorrow.

Since 2010, Singapore and Beijing have replicated Hong Kong's tax-free port model, and Shanghai also includes cultural industry in the newly launched Pilot Free Trade Zone. Each government on the Asian Main Line has been trying to demolish the existing trade barriers and tariff restrictions. In the meantime, is Taiwan, without these advantages, still able to find a way out for survival in this regional art market filled with quasi-network of freeports? In the session "Culture Freeport in Asia: Trends & Strategies," Chairman of Singapore Freeport Real Estate Pte Ltd, Tony REYNARD, is invited to analyze the development

of this critical trend that would impact the entire visual arts industry for all the participants, based on the management experience in the state-of-the-art storage facilities worldwide of the Singapore Freeport's holding company.

This year, Art Taipei Forum is pioneering the first "Thematic Paper Session" for the visual art industry. In collaboration with National Taiwan Normal University, College of Management and the University of Maastricht, Departments of Arts and Social Sciences in The Netherlands. Combining innovation and resources of industry and academic fields, this session aims to promote interdisciplinary dialogue for further sustainable development of visual art industry. Four papers will be officially published with topics covering "Transforming Closed Schools into Art Spaces - an

observation on Taiwan's and Japan's Current Conditions," "The Platform of Online Art Trading: An Initial Analysis between the Asian Chinese-speaking Market and Western Market," "Arts Administration - The Business of the Arts" and "East Asia Art in London - With Main Concerns on the Primary Contemporary Chinese Art Market," in the hope that this session can become a permanent academic paper publication and exchange platform for global visual art industry research field.

In the final session "Asian Value," echoing the theme of this year, several professionals from local and international prominent galleries join a panel discussion to exchange and share their observation on Asian environment in terms of art creation and art economy, through comparison with their long-term

experience in Western art market. By doing so, we expect to discover challenges and opportunities for Asian art, in order to constantly foster the innovation and enrichment of Asian value.

Art Taipei Forum is one of the few international art conference that cover both business and academia in Taiwan. Joined by professionals and industry representatives from both Taiwan and abroad, the Forum provides a systematic introduction of Asian art and culture that boast great uniqueness and heterogeneity as well as diverse perspectives and distinct discourses on market and industry. You are heartily welcome to participate in Art Taipei Forum, a communication platform that bridges Asian and the global art.

Oliver Chang

Yih-Chyun CHANG
The Convener of 2013 Art Taipei Executive Committee

論壇介紹

台北藝術論壇是國內少數兼顧學術與市場的國際型藝術研討會，與國內外精英與產業代表，系統性的介紹充滿特殊性與內部多元性的亞洲藝術文化，與其跨市場等多元觀點與論述，並藉每年一度台北藝術論壇作為串連亞洲與國際藝術世界的交流平台。隨著國際間對於亞洲藝術與美學的關注逐年提升，以亞洲現象開始交集的各種文化觀點以價值的討論，逐漸匯成一股時代性的效應及風潮，並促成多樣形式的論辯。「2013 台北藝術論壇」以『亞洲價值』為主題，藉歐美經典案例做為楔子，比對亞洲現況，綜觀全球藝術市場發展態勢。

主要議題

城市藝術經濟力

「文化」對全球化與城市經濟及空間的重構與影響

據研究證實，「指標性藝術計畫」有助於提升城市藝術經濟力。在歷經新興科技的崛起與產業轉型的變革後，都市更新與閒置空間再利用的議題開始受到政府與民間組織的關注。當舊有的文化與歷史日漸褪色，失去核心資源的閒置區域該何去何從，成為我們需要共同思索、達成共識，進而攜手執行的重要課題。今年，台北藝術論壇以「城市藝術經濟力」為主題，邀請到德國魯爾博物館 (Ruhr Museum) 館長－尤里奇·伯斯多夫博士 (Dr. Ulrich BORSODORF)，藉著當地礦業遺址再利用的經典案例，對照台灣文化古蹟保存與工業地景再生的現況，以在地參與、人本思考以及跨界創新為出發點，一同探索老舊建物在保存、開發與更新間的各種可能，重新發掘亞洲後工業都市專屬的藝術經濟潛力。

企業藝術經濟力

「藝術倡議 ABIs」啟動企業藝術資產配置 提升營運績效

近年來，國際企業界對藝術的收藏與贊助已蔚為一股風潮，無論是單純地提供金錢贊助、藉由獎項或駐村提供創作及展覽資源，或是在全球藝術市場進行策略性的藝術品購藏佈局，藉由「藝術倡議 (Art-Based Initiatives)」的實踐，企業在提升品牌形象與營運績效的同時，也為藝術從業者帶來實質的助益，成功創造互惠的雙贏模式。

成立於 1870 年，總部位於法蘭克福的德意志銀行，全球共有 3,078 個分公司，總員工人數 98,219 人，如今已成為重要國際藝術博覽會的主要贊助者，更擁有全球規模最大逾 56,000 件藝術品收藏。在資產配置策略上，隨著作品市場價值的提升，對於維持企業總資產金額上發揮一定程度上的助益。在藝博會的贊助策略上，規劃專區展示德銀收藏品於 VIP 客戶面前，一來展現企業收藏實力，更重要的是傳達德銀於藝術顧問理財服務的專業度。有鑑於此，台北藝術論壇特於今年規劃了「企業藝術經濟力」專題，邀請到德意志銀行全球藝術部總監人－弗理德海姆·胡特先生 (Friedhelm HÜTTE)，就德意志銀行富有盛名的藝術贊助計畫進行系統性的多方剖析，期盼藉由德意志銀行的經驗交流，在國內激發更多藝企合作的想像，讓台灣企業也能在其中開創出一片兼顧文化與經濟價值的嶄新藍海，進一步探討全球藝術金融化浪潮對視覺藝術產業發展趨勢與影響。

學術論文發表

台荷頂尖大學攜手合作 全國唯一視覺藝術產業領域之發表平台

台北藝術論壇於今年首創全國唯一針對視覺藝術產業規劃的「學術論文場次」，與國立台灣師範大學管理學院以及荷蘭馬斯垂克大學藝術與社會科學院合作，結合產業與學術領域之創新元素與資源，除培養產業前瞻性理念的領航者外，亦望能推動跨領域的嶄新對話，進而推動視覺藝術產業的永續發展。首屆徵件在經過國際論文審查委員的綜合評選後，共計有四篇涵蓋「閒置空間再利用」、「藝術品電子商務」、「藝術行政管理」以及「東亞當代藝術市場」等不同面相的論文，將在今年論壇的學術論文場次進行公開發表，企盼在未來建立起全球性視覺藝術產業學術論文固定的發表與交流平台。

Introduction

With the ever rising attention on Asian art and aesthetics in the international community, discussions on cultural perspectives and values fused by the Asia Phenomenon are coming together as a trend of our times that sparks conversations and debates in various forms. With “Asian Value” as the theme of the year, the 2013 Art Taipei Forum will fully observe the development trends of art markets in Asia. There are a number of important issues worth our close observation and understanding.

Themes

Urban Art Economy

The Influence of Culture on Globalization, Urban Economy and Spatial Reconstruction

According to research, it has been confirmed that “Flagship Art Projects” do help in increasing economic development in cities. Following the rise of emerging technologies in the industrial transformation, urban renewal and regeneration of unused spaces began to garner attention from both the government and civil society organizations. When the existing culture and history gradually fades away, the unused spaces that have lost their core resources are at lost for a future. This issue becomes an important challenge that requires us to jointly think about, reach consensus and execute collectively. On the topic of “Urban Art Economy – Culture is the Key”, Art Taipei Forum invited Dr. Ulrich BORSODORF, the director of the new Ruhr Museum, as the keynote speaker, to share the classic case of reusing the local mining ruins and to compare it with Taiwan’s current situation of cultural heritage preservation and renewal of industrial landscape. Using local participation, humanitarian concepts and interdisciplinary innovation as a starting point to jointly explore the old buildings conservation, development and possibilities for renewal, while rediscovering the unique economic impact of post-industrial cities in Asia.

The Value of Arts for Business and Institutes

“Art-Based Initiatives (ABIs)” Inspire Corporate Asset Allocation in Art & Enhance Operational Performance

In recent years, it has become a trend that international corporations collect and sponsor in art, whether it is simply to provide financial sponsorship; through prizes, by providing creative and exhibition resources for art residencies or strategic purchases of art collection from the international art market. By implementing “Art-Based Initiatives (ABIs)”, corporations can enhance their brand image and operation performance and also bring about actual assistance for art practitioners at the same time, successfully creating a mutually beneficial, win-win model.

Founded in 1870 and headquartered in Frankfurt, Deutsche Bank, with 3,078 branches worldwide and a total of 98,219 employees, has now become a major sponsor for important international art fairs and owns the world’s largest collection of over 56,000 pieces of art. In terms of asset allocation strategies, as art works’ market value increases, it becomes a substantial beneficial factor for maintaining the corporation’s total asset value. In terms of art fair sponsorship strategy, the bank would plan a special exhibition area for the VIP clients to demonstrate their collection ability, and more importantly, to show Deutsche Bank’s level of professionalism in their art consultancy financial services. In view of this, Art Taipei Forum specially designed the topic of “The Value of Arts for Business and Institutes” and invited Mr. Friedhelm HÜTTE as Global Head of Art at Deutsche Bank AG, to provide the systematic analysis of Deutsche Bank’s prestigious arts sponsorship programs in the hope that through this exchange of experience, it would inspire more collaboration between art and businesses in Taiwan, where local corporations tempt to explore a brand-new Blue Ocean Strategy that creates both cultural and economic value. Furthermore, the session also discovers how the wave of financial sectors in global art has affected the development and trends of visual art industry.

Thematic Paper Session

Alliance with Top Universities from Taiwan and The Netherlands — aims to make connections and provoke conversations within and across disciplines in visual art industry.

Art Taipei Forum is pioneering the first “Thematic Paper Session” for the visual art industry. In collaboration with National Taiwan Normal University, College of Management and the University of Maastricht, Departments of Arts and Social Sciences in The Netherlands. Art Taipei Forum combines innovation and resources of industry and academic fields to not only nurture forward-thinking leaders but also to promote interdisciplinary dialogue for further sustainable development of visual art industry. The submissions resulted in 4 papers being selected by the international programme committee, covering “Transforming Closed Schools into Art Spaces - an observation on Taiwan’s and Japan’s Current Conditions”, “The Platform of Online Art Trading: An Initial Analysis between the Asian Chinese-speaking Market and Western Market”, “Arts Administration - The Business of the Arts” and “East Asian Art in London - With Main Concerns on the Primary Contemporary Chinese Art Market”. These papers will be officially published in the hope that it can become a permanent academic paper publication and exchange platform for global visual art industry research field.

年度主題：**亞洲價值**

舉辦地點：**信義誠品六樓視聽室**

11月8日 (Fri) 2013		11月9日 (Sat) 2013		11月10日 (Sun) 2013	
報 到					
9:30					
10:00-12:00	<p>城市藝術經濟力 - 文化關鍵</p> <p>尤里奇·伯斯多夫 德國魯爾博物館館長</p> <p>與談人 林崇傑 台北市都市更新處處長</p> <p>主持人 吳介祥 社團法人中華民國視覺藝術協會理事長</p>	<p>全球藝術市場報告</p> <p>詹姆士·古德溫 藝術市場專家</p> <p>亞洲文化自由港的趨勢與戰略</p> <p>東尼·雷納德 新加坡自由港房地產管理有限公司主席</p>	<p>亞洲價值與談人</p> <p>長谷川智惠子 日本日動畫廊副社長 Andreas HECKER 香港 Ben Brown Fine Arts 畫廊總監 張學孔 新苑藝術負責人</p> <p>主持人 陳韋晴 紐約 inCube Arts 藝術中心創辦人</p>		
13:30-15:00	<p>學術論文場次 I</p> <p>產業環境與趨勢研究</p> <p>I 談宜芳：從廢校轉變為藝術空間 - 臺灣與日本案例的觀察</p> <p>II 林牧葶、張乃予：藝術品網路交易平台：亞洲華語市場與西方市場初探分析</p> <p>主持人 約普·德容 荷蘭馬斯垂克大學藝術與文化遺產研究所所長</p>	<p>企業藝術經濟力</p> <p>弗理德海姆·胡特 德意志銀行企業公民責任部 全球藝術策略負責人</p> <p>主持人 劉奕成 英商巴克萊銀行台北分行 投資銀行部董事總經理</p>			
15:30-17:00	<p>學術論文場次 II</p> <p>藝術市場 - 量化與質化調查分析</p> <p>I 派特·維勒尼芙： 藝術行政 - 藝術這門行業</p> <p>II 蕭雅文：東亞藝術在倫敦 - 以中國當代藝術一級市場為主要關注</p> <p>主持人 印永翔 國立台灣師範大學國際事務處處長</p>	<p>ArtPP - 藝術市場的數位行銷與統計分析</p> <p>石隆盛 台北藝術產經研究室執行長</p>			

*主辦單位保留議程更動的權利

講者與主持人

依照出場順序排列

尤里奇·伯斯多夫	魯爾博物館館長
林崇傑	台北市都市更新處處長
吳介祥	中華民國視覺藝術協會理事長
約普·德容	荷蘭馬斯垂克大學藝術與文化遺產研究所所長
印永翔	國立臺灣師範大學國際事務處處長
詹姆士·古德溫	藝術市場專家
東尼·雷納德	新加坡自由港房地產管理有限公司主席
弗理德海姆·胡特	德意志銀行企業公民責任部 全球藝術策略負責人
劉奕成	英商巴克萊銀行台北分行投資銀行部董事總經理
石隆盛	台北藝術產經研究室執行長
陳韋晴	紐約 inCube Arts 藝術中心創辦人
長谷川智惠子	日本日動畫廊副社長
Andreas HECKER	香港 Ben Brown Fine Arts 畫廊總監
張學孔	新苑藝術負責人

論文發表者

談宜芳	內政部營建署
林牧葶	臺灣藝術大學藝術管理與文化政策研究所
張乃予	臺灣藝術大學藝術管理與文化政策研究所
派特·維勒尼芙	佛羅里達州立大學藝術教育學院
	藝術行政研究所主任
蕭雅文	倫敦蘇富比藝術學院當代藝術研究所

Theme: **ASIAN VALUE** Venue: **6/F Audio-Visual Room Eslite Xinyi Book Store**

	8 November, 2013 (Fri)	9 November, 2013 (Sat)	10 November, 2013 (Sun)
	Registration		
9:30			
10:00-12:00	<p>Urban Art Economy – Culture is the Key</p> <p>Dr. Ulrich BORSODORF Director of Ruhr Museum</p> <p>Panelist Chung-Chieh LIN Director of Taipei City Urban Regeneration Office</p> <p>Moderator Dr. Chieh-Hsiang WU Chairwoman of the Association of the Visual Arts in Taiwan</p>	<p>Global Art Market Report</p> <p>James GOODWIN Art Market Specialist</p> <p>Culture Freeport in Asia: Trends & Strategies</p> <p>Tony REYNARD Chairman of The Singapore Freeport Real Estate Pte Ltd</p>	<p>Asian Value</p> <p>Panelist Chieko HASEGAWA Vice-President of galerie nichido</p> <p>Andreas HECKER Director of Ben Brown Fine Arts</p> <p>Richard CHANG Director of Galerie Grand Siecle</p> <p>Moderator CHEN Wei-Ching, Joanne Founder of inCube Arts, New York</p>
13:30-15:00	<p>Paper Session I</p> <p>Industrial Environment & Trends</p> <p>I Yi-Fang TANG: Transforming Closed Schools into Art Spaces - an observation on Taiwan's and Japan's Current Conditions</p> <p>II Mu-Ting LIN · Nai-Yu CHANG: The Platform of Online Art Trading: An Initial Analysis between the Asian Chinese-speaking Market and Western Market</p> <p>Moderator Dr. Joop de JONG Director of MA Arts and Heritage: Policy, Management and Education, Maastricht University, The Netherlands</p>	<p>The Value of Arts for Business and Institutes</p> <p>Friedhelm HÜTTE Global Head of Art of Corporate Citizenship, Deutsche Bank AG</p> <p>Moderator I-Cheng (I.C.) LIU Managing Director of Investment Banking of BARCLAYS Bank PLC Taipei Branch</p>	
15:30-17:00	<p>Paper Session II</p> <p>Art Market-Qualitative and Quantitative Analysis</p> <p>I Pat Villeneuve: Arts Administration - The Business of the Arts</p> <p>II Ya-Wen HSIAO: East Asian Art in London – With Main Concerns on the Primary Contemporary Chinese Art Market</p> <p>Moderator Dr. Yung-Hsiang YING Dean of Office of International Affairs, National Taiwan Normal University</p>	<p>ArtPP: Digital Marketing & Statistical Analysis for Art Market</p> <p>Long-Sheng SHIH Executive Director of Taipei Art Economy Research Centre</p>	

*Programme may be subject to change.

Speaker & Moderator

The names are listed in order of programme.

Dr. Ulrich BORSDORF

Director of Ruhr Museum

Chung-Chieh LIN

Director of Taipei City Urban Regeneration Office

Dr. Chieh-Hsiang WU

Chairwoman of Association of the Visual Art in Taiwan

Dr. Joop de JONG

Director of MA Arts and Heritage: Policy, Management and Education, Maastricht University, The Netherlands

Dr. Yung-Hsiang YING

Dean of Office of International Affairs, National Taiwan Normal University

James GOODWIN

Art Market Specialist

Tony REYNARD

Chairman of Singapore Freeport Real Estate Pte. Ltd.

Friedhelm HÜTTE

Global Head of Art of Corporate Citizenship, Deutsche Bank AG

I-Cheng (I.C.) LIU

Managing Director of Investment Banking of BARCLAYS Bank PLC Taipei Branch

Long-Sheng SHIH

Executive Director of Taipei Art Economy Research Centre

Chen Wei-Ching Joanne

Founder of inCube Arts Foundation, New York

Chieko HASEGAWA

Vice President of galerie nichido

Andreas HECKER

Director of Ben Brown Fine Arts

Richard CHANG

Director of Galerie Grand Siecle

Thematic Paper Session Speaker

The names are listed in order of programme.

Yi-Fang TANG

Construction and Planning Agency Ministry of the Interior

Mu-Ting LIN

National Taiwan University of Arts Graduate School of Art Management & Culture Policy

Nai-Yu CHANG

National Taiwan University of Arts Graduate School of Art Management & Culture Policy

Pat VILLENEUVE

Director of Arts Administration in the Department of Art Education, Florida State University, USA.

Ya-Wen HSIAO

MA Contemporary Art, Sotheby's Institute of Art London



城市藝術經濟力

德國礦業同盟工業文化園區

尤里奇·伯斯多夫博士

德國魯爾博物館館長

魯爾博物館

位於德國礦業同盟工業文化園區 (The Zollverein Coal Mine) 的魯爾博物館 (The Ruhr Museum) 不僅僅是一個介紹工業歷史的博物館，而是一種新形態的地區博物館。它提供今日當地超過五百萬居民，一扇通往昔日作為歐洲最大工業區歷史記憶的窗口。魯爾博物館綜合了自然、考古、及人文等三個層次的保存及展示。其中有趣的是，儘管分屬不同範疇，這些不同類別的展覽並非被分門別類展示。來自斯圖加特 (Stuttgart) 的建築師 HG Merz，運用原本建築結構巧妙融合不同內涵及特色的展覽。融合的概念將自然和人文歷史的展示相互牽引，從 300 萬年前形成的煤礦到當代城市結構改變的魯爾大都會區生活樣貌，呈現出魯爾地區多面相的歷史。在同一個空間中，人們記憶及歷史分別可以從三個不同的層次去指涉。

位於德國礦業同盟工業文化園區的魯爾美術館建築本身，即是相當壯觀的。即便經過建築師庫哈斯 (Rem Koolhaas) 和伯爾 (Heinrich Böll) 的重新演繹和轉換，昔時的煉煤廠光是體積和建築結構就讓人印象深刻。原本用來處理、存放、和運送煤礦的功能在建築中留下特別的構造：巨石和機具、厚實封閉的儲藏室、及將近 100 公尺長的空曠空間。在這裡，歷史遺跡、當代展覽與建築本身的交會，隨即創造一個獨特的空間體驗。

德國礦業同盟工業文化園區

魯爾博物館所在的德國礦業同盟工業文化園區，曾經是世上最先進的煤礦場。在 1928 至 1932 年間由 Fritz Schupp 和 Martin Kremmer 以包浩斯 (Bauhaus) 風格設計建造，是當時優秀工業功能主義的典型範例，之後在 1986 年關閉。被轉換成藝術、文化、歷史、文創用途之後不久，在 2001 年隨即被列入聯合國世界文化遺產。德國礦業同盟工業文化園區因此成為一個現代工業文明的表徵，更象徵著魯爾地區產業結構的改變和傳統與未來的交融。



Urban Art Economy

The New Ruhr Museum at Zollverein in Essen

Dr. Ulrich BORSDORF

Director of Ruhr Museum

Museum

The Ruhr Museum at the Zollverein Coal Mine is not an industrial museum, but a new type of regional museum. It is the historic memory of and the window for the Ruhrgebiet, the formerly largest industrial area in Europe, with a population (today) of over five million people. The Ruhr Museum combines various types of museums, i.e. a natural history, an archaeological and a historical museum, under just one roof. Interestingly, these different types are not displayed separately, as strongly suggested by three exhibition levels. The exhibition architecture designed by the Stuttgart-based architect HG Merz integrates the contents and features of the exhibition into the existing structure of the building: An integrative concept combines natural and cultural history, showcasing the entire history of the Ruhrgebiet, from the formation of coal 300 million years ago to the current structural change towards the Ruhr Metropolis. The categories Present, Memory and History are each assigned to one of the three exhibition levels. The Ruhr Museum building at Zollverein could hardly be more spectacular. The former Coal Washing Plant is mighty impressive due to its sheer size and architecture, transformed by Rem Koolhaas and Heinrich Böll. The treatment, storage and distribution of coal have left behind amazing structures: Gigantic halls with cyclopean machines, solid windowless storehouses, and impressive space axes nearly 100 m long. A new spatial experience is created by the relationship between the historic structure of the building and the modern exhibition architecture and original exhibits.

Zollverein

The location of the Ruhr Museum is the Zollverein Coal Mine, once the most modern and productive coal mine in the world. It was constructed in 1928 to 1932, by Fritz Schupp and Martin Kremmer, an excellent example of the industrial functionalism, comparable to the Bauhaus Zollverein has been listed since its closure in 1986. It was not long before it was converted into a location for art, culture, history and creative industries and was placed on the UNESCO World Cultural Heritage List in 2001. Zollverein is therefore a unique expression of the modern industrial age. For years it has been a symbol for the structural change in the Ruhr and for an extraordinary mix of tradition and future.

尤里奇·伯斯多夫博士

德國魯爾博物館館長

尤里奇·伯斯多夫博士 (Dr. Ulrich BORSODORF) 擁有歷史與德國文學的背景。曾於德國波鴻大學 (Ruhr-Universität Bochum) 和埃森大學 (Essen University) 擔任客座教授。於 1986-2007 年間擔任埃森市 (Essen) 魯爾博物館 (Ruhrlandmuseum) 館長，並自 2008 年就任德國礦業同盟工業文化園區 (Zollverein)

內新設魯爾博物館 (Ruhr Museum) 館長，負責博物館內與工業遺址園區的展覽策劃。伯斯多夫博士現為國際間多所博物館的顧問，並有多本著作出版，主題涵蓋 19 及 20 世紀的社會運動、德國二次戰後的歷史、魯爾地區的歷史，以及有關博物館、攝影的歷史和理論等等。

Ulrich BORSDORF

Director of Ruhr Museum

Dr. Ulrich BORSDORF owns a background of History and German Literature. He was a lecturer at the Ruhr-Universität Bochum and Essen University. From 1986 to 2007, Dr. BORSDORF worked as the director of the Ruhrlandmuseum in Essen City. He was then transferred to the newly established Ruhr Museum in the Zollverein Coal Mine Industrial Complex as director in 2008, and during this period of time, he had produced plenty of exhibitions in the

museum and in the industrial heritage sites for the IBA Emscher Park.

Dr. Ulrich BORSDORF is now working as an advisor of various museums and cities worldwide. He is also the author of numerous publications on subjects includes social movements in the 19th and 20th century, the history of Germany after World War II, the history of the Ruhr area, the history and the theory of museums and photography.



林崇傑

台北市都市更新處處長

日本東京大學工學博士、建築師、都市計畫技師

長期於台北市推動都市設計、歷史保存、社區營造、公共藝術、與都市再發展之工作與創意城市之推動，並實際負責上述領域之體制建立、法令訂定、與各項行動計畫之策劃與執行。

現任

台北市都市更新處處長

文化部聚落及文化景觀審議委員會委員

經歷

台北市政府都市發展局總工程司、主任秘書

台北市都市設計與土地使用開發許可審議委員會執行秘書

國立台北科技大學建築系兼任助理教授

國立師範大學地理系兼任助理教授

私立中國科技大學建築研究所兼任助理教授

文建會古蹟、歷史建築及聚落審議委員會委員

文建會文化景觀審議委員會委員

台北市公共藝術審議委員會委員

新北市公共藝術審議委員會委員

Chung-Chieh LIN

Director of Taipei City Urban Regeneration Office

Ph.D., University of Tokyo in Japan, Architect, Urban Planning Technician

Promoting urban design, historic preservation, community development, public art, and urban re-development and promote creative city promotion, and responsible for institution-building of above-mentioned areas, decrees set, and the planning and execution of various action plans.

Present

Director, Taipei City Urban Regeneration Office

Ministry of Culture and Cultural Landscape Settlement Committee Member

Work Experience

Taipei City Government, Urban Development Bureau
Chief Engineer, Chief Secretary

Taipei Urban Design and Land Use Development Permit Consideration Commission, Executive Secretary

National Taipei University of Technology, Department of Architecture, Adjunct Assistant Professor

National Taiwan Normal University, Department of Geography, Adjunct Assistant Professor

Private China University of Technology, Department of Architecture, Adjunct Assistant Professor

CCA monuments, historic buildings and settlements Review Committee Member

CCA Cultural landscape Review Committee Member

Taipei Public Art Committee Review Member

New Taipei City Public Art Review Committee



吳介祥

社團法人中華民國視覺藝術協會理事長

現任

社團法人中華民國視覺藝術協會理事長
國立彰化師範大學專任美術系副教授

學歷

德國奧登堡大學經濟與社會科學博士
德國奧登堡大學社會學／藝術理論系碩士

經歷

曾任畫廊協會藝術產經研究室主任、台北數位藝術中心籌備處行政總監。專長為文化政策、藝術經濟、藝術評論、博物館學、藝術社會學、藝術法律。

Chieh-Hsiang WU

Chairwoman of Association of the Visual Art in Taiwan



Profession

Associate Professor of Department of Fine Art,
Changhua University of Education

Education

Bachelor of Fine Art, National Taiwan Normal
University

Art Teacher, Shih-Pai Junior High School

Master of Sociology/Art (Dual Majors), Carl von
Ossietsky Universität Oldenburg, Germany

Doctor of Economics and Social Science of Carl von
Ossietsky Universität Oldenburg, Germany

Director of Art Economy Research Office, Art Gallery
Association Taiwan

Director of Association of the Visual Arts in Taiwan

Scholarship & Awards

2001 Scholarship of Ministry of Education and
Culture · Lower Saxony

2002 S-An Prize of Excellent Essay on Aesthetics

Specialty

Culture Policy, Art Sociology, Art Economy, Art
Criticism, Art Management, Museology



學術論文發表

從廢校轉變為藝術空間 臺灣與日本案例的觀察

談宜芳

內政部營建署

組別 學術論文場次 | / 產業環境與趨勢研究

摘要

少子化、人口遷移、重大災害是臺灣與日本廢校的共同因素，兩地也有許多廢校再利用為藝術空間，然而兩者的操作方式不同，影響了後續的成效與結果。本論文以臺灣與日本廢校轉變為藝術空間案例，來探討藝術工作者以學校為基地，和當地社區的關係。日本的廢校問題比臺灣嚴重，廢校再利用為藝術空間的經驗多，且社會發展比較成熟，深入分析日本的操作方式，並與臺灣的案例比較，可作為借鏡。

關鍵詞：廢校、藝術空間、人口結構

一 前言

根據我國教育部於 2012 年的統計，截至 2012 年 10 月止，在臺灣因學生數過少必須裁併而廢校有 178 所，因少子化、人口遷移、重大災害的因素，廢校數徒增，尤以屏東縣 25 所、高雄市 24 所、花蓮縣 20 所，較為嚴重。日本文部科學省 2012 年統計，自 1992 年到 2011 年的 20 年間，全日本有 6,834 所公立中小學廢校，北海道 760 校，東京 389 校，居第一、第二高位，前者是邊境鄉鎮，後者為大都市，意謂日本城鄉都有人口結構的問題，也隱含著社會經濟問題，在近幾年政府財政困難、地方產業與經濟停滯下，閒置空間再利用的風潮興起。

二 廢校的成因

在臺灣與日本，廢校都是因少子化、人口遷移、重大災害所導致，只是城鄉的情況有些不同。

1. 少子化

受經濟情勢影響，近幾年臺、日兩國的生育率均低，2005 至 2010 年臺灣的生育率是 1.05，日本則是 1.27，¹ 超過 10 年低迷的生育率，導致少子化、就學人口驟減，從統計數據得知，日本 1990 年 0-14 歲人口佔 18.2%，2010 年 0-14 歲人口佔 13.0%，² 臺灣 1990 年 0-14 歲人口佔 27.3%，2010 年 0-14 歲人口佔 14.63%³，臺灣的情況比日本劇烈。

2. 人口遷移

人口遷移的因素在鄉村與都市略有不同。在鄉村，人們因就業機會少、交通不便、生活機能不完善而離鄉，都市則因房價太高，年輕人無力負擔高房價而遷到郊區，或因都市房屋老舊，移往新興地段，而形成多納茲化 (donut) 現象，也就是都市核心的人口外移，造成中空的狀態，像甜甜圈一樣。

3. 重大災害

臺、日都位處環太平洋的地震帶，夏季也多颱風，近幾年發生的重大災害，如臺灣 1999 年的集集大地震、2009 年莫拉克風災，日本 2011 年東北地震引發海嘯、水災、核災等，導致民宅與學校的房舍、設施受損難以重建，或成為地質敏感區、不適人民居住而遷移。

表 1 廢併校政策大事紀

時間序	具體作法
1987 5月	臺灣省教育廳頒布「小型學校合併處理原則」，查為廢併校之濫觴。原則內容如下： <ol style="list-style-type: none"> 1 併校後學生不住校。 2 併校後學生步行可於 1 小時內到達，且無安全顧慮。 3 併校後學生乘車須一次到達，不必換車，且乘車時間不宜過長。 4 3 班以下之學校（包括分班、分校）學生在 50 人以下，且學生有逐年減少之趨勢者。 5 為方便學童上學，小規模學校如可採自由學區者，擬具計劃報廳核辦。 6 有其他特殊情形以合併為宜者。
1989	地方政府逐年廢併 50 人以下的小型學校，或每班學生數不滿 10 人的學校，依據各地狀況、實際需要、家長意見、學生學業、交通情況及民意之反映等要素，檢討改進，逐年整併 50 人以下的小規模學校。
1994	教育廳召開「臺灣省小規模學校辦學規模檢討會」，得到結論如下 <ol style="list-style-type: none"> 1 小規模學校不限於山地偏遠地區，平地型小規模學校學生人數在 30 到 40 人之間者，亦進行評估併校。 2 併校原則以 2 至 3 所學校合併為 1 個學校，併校後每個年級不宜超過 3 班、每班人數不超過 40 人。 3 由各縣市政府詳加考慮，以阻力較小的學校先行試辦。 4 併校後原校地可規劃為文化社教中心，安排專人或教師規劃處理社區文化推動事宜。
1996	教育廳提出小型學校的合併計劃，以每年廢併 5 所為目標。
2001	教育部因應處理地方政府進行小校廢併，建議地方政府訂定相關之配套措施。
2004 5月	監察院（黃煌雄，趙榮耀，呂溪木）提出「教育部所屬預算分配結構之檢討報告書」。
2005	教育部委託侯世昌、王保進、楊銀興、曾榮華學者專家進行「國民小學小型學校發展及最適學校規模之研究」；召開「國民中小學最適規模與轉型策略 -- 以小規模學校整併之可行性政策」會議，決議研究成立裁整併小規模學校的客觀評估指標。
2006 年	教育部公佈「小型學校發展評估指標」。
2007	教育部公佈「特色學校發展方案」與「閒置校區及校舍多元運用計畫」，鼓勵地方政府以發展特色學校為積極作為。
2008	教育部委託鄭同僚等學者專家研究「偏遠地區小學再生之研究成果報告」。 11 月教育部公佈「國民中小學整併之處理原則」供各縣市遵循。

資料來源：監察院（2012），頁 2-3

三 臺灣的廢校再利用為藝術空間之現況

1. 臺灣的廢校政策與廢校建築再利用流程

臺灣具體的廢校政策起源於 1987 年臺灣省教育廳頒布「小型學校合併處理原則」，2001 年教育部提出裁併 6 班以下小校的構想，但未推行，僅少數地方政府在財政困窘下，開始著手裁併校措施。2004 年，監察委員黃煌雄、趙榮耀、呂溪木提出「教育部所屬預算分配結構之檢討」報告書，建議各縣市政府裁併百人以下的小校，以節省每年高達 51 億元的人事經費，⁴ 基於少子化的趨勢現實，各縣市政府大舉整併小校，然各縣市的標準不一，基本上依照 1987 年臺灣省教育廳頒布「小型學校合併處 原則」及 2008 年教育部公佈「國民中小學整併之處 原則」，但也有縣市未明定廢校原則。廢併校政策的歷史沿革如表 1。

根據教育部 2012 年統計，全臺廢併校舍數總共有 178 座（如表 2），校舍活化用途類別分為：文教區（佔 19.33%）、觀光休閒（佔 36.97%）、社福機構（佔 2.52%）、機關團體使用 / 學校自行維護（佔 31.09%）、土地歸還 / 拆除（佔 10.08%）。⁵

表 2 全國國民中小學廢併校舍分布表

縣市別	校舍已再利用	待利用	合計
臺北市	1	0	1
新北市	15	2	17
臺中市	0	3	3
臺南市	13	5	18
高雄市	22	2	24
基隆市	3	0	3
桃園縣	2	1	3
新竹縣	5	0	5
苗栗縣	2	1	3
南投縣	1	3	4
彰化縣	2	0	2
雲林縣	3	1	4
嘉義縣	8	10	18
嘉義市	1	0	1
屏東縣	15	10	25
臺東縣	10	5	15
花蓮縣	15	5	20
宜蘭縣	6	0	6
澎湖縣	4	2	6
合計	128	50	178

更新日期：2012 年 10 月

資料來源：整理自教育部統計

這些校舍的再利用，理應參照 2008 年「國民中小學整併之處原則」所擬定的整併作業流程（圖 1），及 2007 的「活化校園空間總體規劃方案」提出廢校後校舍的再利用機制與作業流程（圖 2），然而在地方的做法卻不同調，例如「嘉義縣小型學校轉型發展作業」，其作業流程中，應開誠布公讓民眾參與的公聽會是在「向縣座簡報並簽核」才召開（圖 3），民眾參與可能也徒具形式，是否廢校、廢校後校舍的用途、學校師生的後續安排等似乎都是政府主導，採由上而下的操作方式，在溝通不足的情況下，曾演變成學生與家長向縣長抗議並提出訴訟的僵局，而學者鄭同僚則以「粗暴」形容政府廢除小校的作法，他認為此手段是「三欺四切」：三欺是欺貧（低所得）、欺生（外配家庭）及欺弱（不懂抗爭），四切是切斷兒童當下與鄉土聯結、切斷居民的社區生活中心與文化中心、切斷未來社會發展的基礎、切斷遊子返鄉的根源。⁶

圖 1 國民中小學整併作業流程

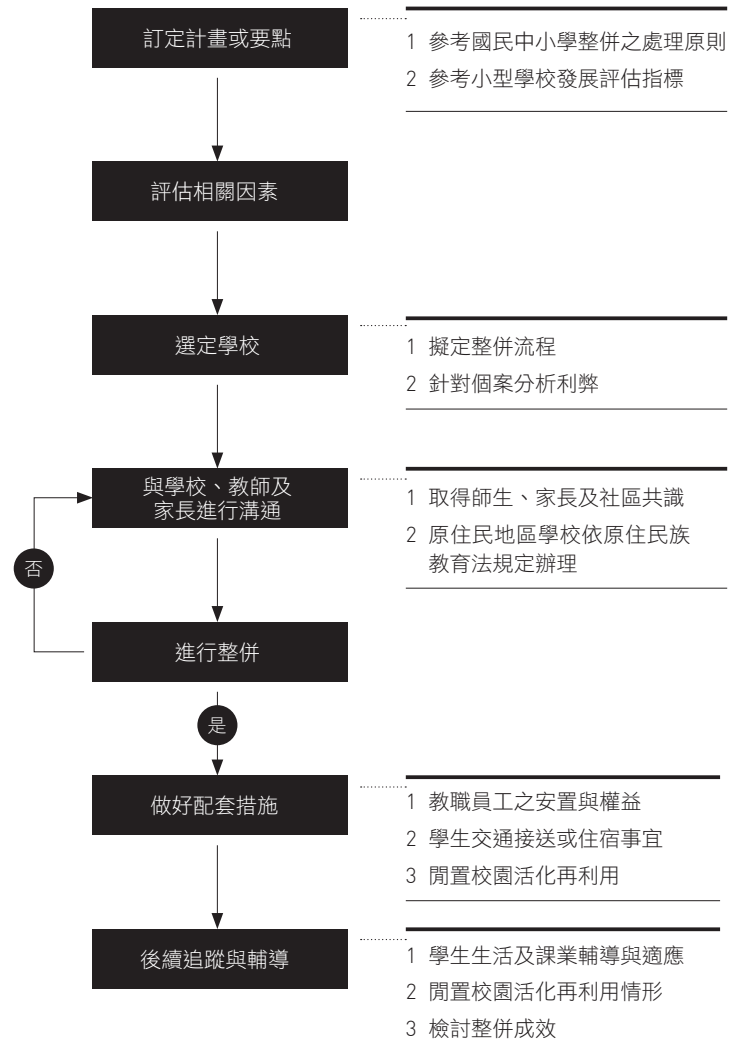
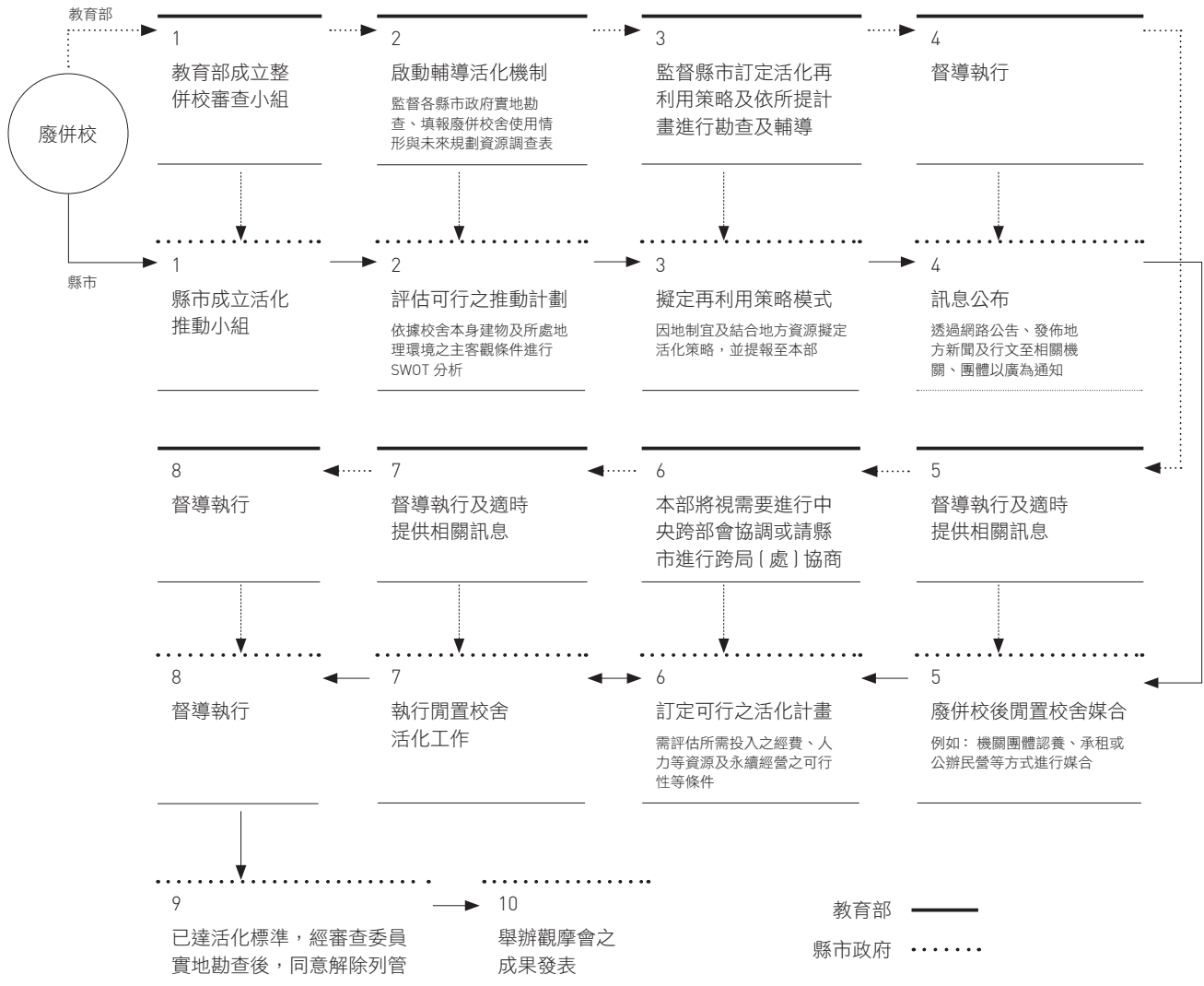


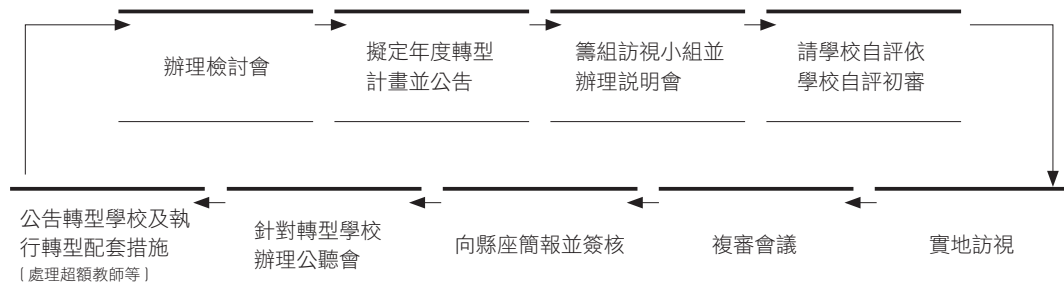
圖 2 廢校後校舍的再利用機制與作業流程

整併校活化再利用機制與作業流程



資料來源：監察院(2012)，頁 61

圖 3 嘉義縣小型學校轉型作業流程圖



資料來源：監察院(2012)，頁 36

不過，就在地方小規模學校一間一間裁併、關閉的同時，行政院文化建設委員會（現文化部）開始推行與倡導「社區總體營造」、「閒置空間再利用」、「藝術介入空間」、「地方文化館」、「生活美學館」等政策，以空間再利用的方式來活絡地方，並希望活絡後，增加稅收來挹注空虛的國庫。兩部會所面臨的問題不盡

相同，也沒有直接的合作，但政策卻在地方上一拍即合，建構了廢校建築被再利用為藝術空間的環境背景。然而看似巧妙的運用，實際上大部份廢校藝術空間的營運效果不佳，被荒煙蔓草淹沒，或被小偷洗劫一空，甚至成了社區治安隱憂，形同蚊子館，引發新的問題。⁷

2. 臺灣的廢校再利用為藝術空間之案例

1. 臺南市麻豆區總爺藝文中心

總爺國小可說是臺灣最知名的廢校案例，其簡史如表 3。2008 年 5 月，臺南縣縣長蘇煥智提出將總爺國小併入文正國小，當時的總爺國小只有 156 名學生，文正國小僅 111 名，校區預定撥給臺南藝術大學使用，為總爺藝文中心的一部份。縣政府的一紙公文說併校就併校，並且要求所有教職員新學期前往新的學校報到，此一突然的命令，讓師生、家長、校友錯愕，開始掀起反併校行動，該年 7 月學生代表鄭雅心提起訴願，經教育部審議決定撤銷原處分（97.07.14 台訴字第 0970121189C 號函），正當各界開始注意這個小學生告贏縣政府的新聞，縣政府以罕見的效率進行併校作業，2008 年 8 月 1 日，總爺國小正式被裁併，結束了 60 年的歷史，而訴訟案則歷經 4 年，至 2011 年 6 月，最高行政法院判決原告上訴駁回，全案定讞。

總爺國小廢校並不是因學生數少、依據教育部的原則裁併，因而過程風風雨雨，不僅學生的受教權、家長的參與權、老師的工作權以及社區居民的和諧都蒙上陰影，原定要進駐並協助總爺藝文中心成為國際級「生活工藝創意美學文化園區」的臺南藝術大學，也遲遲未進駐園區。縣、市合併後的臺南市政府，將總爺國小校舍轉為藝文中心的辦公室與研習教室之用，每年使用人次約有 600 位，⁸ 藝文中心的活動重點還是在幾棟日治時期的糖廠建築。（圖 4、圖 5、圖 6）

表 3 總爺藝文中心簡介

現名	總爺藝文中心
營運單位	臺南市政府文化局
原校名	總爺國民小學
簡史	<p>1947 年 3 月 16 日設立，名為「台糖第十小學」。</p> <p>1948 年 2 月，改名為「台南縣私立台糖第三小學」。</p> <p>1949 年 4 月，台糖第三小學易名為「台南縣麻豆鎮總爺代用國校」。</p> <p>1968 年 8 月 1 日，台糖將各廠附設小學移交地方政府接辦，總爺代用國校改名為「台南縣麻豆鎮總爺國民小學」。</p> <p>2008 年 5 月，臺南縣縣長蘇煥智提出將總爺國小與文正國小合併，讓師生、家長、校友錯愕，開始掀起反併校行動。</p> <p>2008 年 8 月 1 日，總爺國小與文正國小合併，原總爺國小校地成為總爺藝文中心的一部分。</p>
新用途	藝文中心的辦公室與研習教室，未來規劃提供藝術家進駐。



圖 4 總爺藝文中心導覽地圖 資料來源：總爺藝文中心官網 http://tyart.tnc.gov.tw/04_guide/index.php，瀏覽日期：2013年8月25日

圖 5 原總爺國小現況 資料來源：作者拍攝，日期：2013年9月

圖 6 2013年古蹟日活動海報 資料來源：臺南市政府文化局

2. 新北市石門區阿里荖藝術中心

這個位於臺灣最北端新北市石門區，背山面海、景緻絕佳的藝術中心，原是乾華國民小學草里分校（圖 7）。因地處偏遠，與台電核一廠為鄰，家長的職業以農林、漁牧居為多，謀生不易，人口外移嚴重，於 2005 年廢班，所有學生至乾華國小本部就讀，校園因而閒置。（簡史如表 4）

在校園閒置的 5 年期間，曾有多個學校、民間團體表達進駐的意願，其用途包含足球練習場、流行音樂藝術中心等，最後經徵選委由迷工造物社（陶藝工作者章格銘先生）經營。目前校舍的主要功能是章格銘先生個人工作室與漂流木收納場，對外營運的部分有咖啡館兼藝廊、工藝教室，訪客多是假日到北海岸旅遊順到此處遊憩的大臺北地區居民，因而網路上關於阿里荖藝術中心的討論，大多圍繞在擁有絕佳景緻的咖啡館。（圖 8）

由於原草里分校家長因生計問題而參與校務意願不高，教育資訊略顯不足，學生的家庭結構隔代單親（18%）、中低收入戶（14%）與新住民（38%）等比例偏高，⁹ 因此校園的再利用考量，居民並未參與決策，受託營運的阿里荖藝術中心與社區的關係疏離，居民不會來消費，也不參與藝術活動，而阿里荖藝術中心亦無對地方的實質回饋措施，雙方對彼此都不瞭解，非假日的使用度少。

表 4 阿里荖藝術中心簡介

現名	阿里荖藝術中心	
營運單位	陶藝工作者章格銘先生	
原校名	乾華國民小學草里分校	
簡史	1909	金包里公學校阿里荖分校成立
	1921	改隸老梅公學校阿里荖分校
	1945	校本部改為乾華國民學校
	1968	校本部改稱乾華國民小學
	1976	遷至草里現址
	2005	草里分校廢班，學生遷至校本部就讀
	2007	中華民國足球協會提出租用意願
	2009	臺北縣政府提出轉用為皇冠海岸流行音樂藝術中心
	2010.12	阿里荖藝術中心開幕
新用途	陶藝工作室、工藝教室、手工皂 DIY 教室、咖啡館等複合式藝術空間。	



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圖 7 乾華國民小學草里分校大門 資料來源：
作者拍攝 日期：2013 年 8 月 30 日

圖 8 阿里荖藝術中心白日夢咖啡店兼藝廊
資料來源：作者拍攝 日期：2013 年 8
月 30 日

3. 高雄市旗山區旗山生活文化園區

旗山生活文化園區的前身是鼓山國小，為日治時期供日本人與地方望族子弟就讀的小學。鼓山國小並非廢校，而是因校地小、緊鄰旗山國小，且日治時期留下的校舍已經老舊，高雄縣為重整學區，在延平路興建新校舍，將師生移往新校區，舊校舍交由高雄縣政府文化局管理。2000年舊鼓山國小建築被指定為縣定古蹟，2005年縣政府為活用空間，以「高雄縣旗山生活文化園區(舊鼓山國小)委託管理維護案」公開徵選進駐經營之團隊，由旗山鎮形象商圈促進會獲選。(簡史如表5)(圖9)

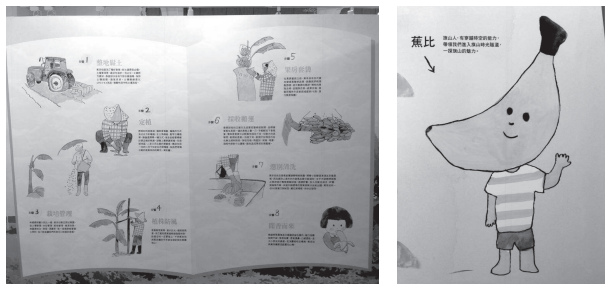
昔日的旗山，以香蕉出口聞名(圖10、圖11)，在1967至1971年產量全盛期間，鎮上蕉農收入豐厚，使得旗山農會存款總額達到全國最高，但近年來榮景早已不在。1999年地方人士有感於小鎮的光芒日益褪色，便成立「旗山鎮中山路老街商圈促進推動委員會」，協同鎮公所和縣政府，積極參加經濟部商業司的商圈評選，以具有豐富歷史人文特色的優質條件入選，旗山鎮自此展開以地方共同參與的商圈推動模式。

表5 旗山生活文化園區簡介

現名	旗山生活文化園區	
營運單位	社團法人高雄縣旗山鎮形象商圈促進會	
原校名	鼓山國民小學	
簡史	1909	設立，名為「蕃薯尋常高等小學校」，供日本人與地方望族子弟就讀的小學。
	1922	改稱「旗山尋常高等小學校」
	1941.4.1	改稱「旗山國民學校」
	1968	又改名為今日的「鼓山國民小學」
	2000	獲指定為縣定古蹟。
	2001	新校舍於延平路竣工，師生全部搬入新址上課，舊鼓山國小交由高雄縣文化局管理。
	2005	縣政府為活用空間公開徵選經營團隊
	2006	旗山鎮形象商圈促進會進駐經營
新用途	旗山文化館、辦公室及旅遊諮詢中心、舊教室復原展示、社團辦公室、展演廳，是凝聚旗山居民的共識，兼具藝文、生活與觀光價值的空間。	



圖9 舊鼓山國小禮堂現況 資料來源：作者拍攝，日期：2013年9月7日



10

11 | 11

圖 10 以教室改裝為「旗遇香蕉王國」展覽場 資料來源：作者拍攝，日期：2013年9月7日

圖 11 「旗遇香蕉王國」展覽內容 資料來源：旗山鎮形象商圈促進會

2003年，商圈促進推動委員會更名為「高雄縣旗山鎮形象商圈促進會」，會員資格放寬，讓全鎮鎮民得以參與，目前促進會以「人文關懷、社區服務、觀光發展」為發展使命，2006年開始接下舊鼓山國小古蹟建築活化任務，將該空間再利用之經營理念，定位為「凝聚旗山居民的共識，建構一個兼具藝文、生活與觀光價值的空間」，¹⁰目前配置的空間功能分別為旗山文化館、辦公室及旅遊諮詢中心、舊教室復原展示、社團辦公室、展演廳等空間。¹¹其營運經費除了來自公部門的補助之外，促進會也相當重視自主性，連結已成為地方文化館的旗山火車站（歷史建築）、老街

商圈，形成旗山區遊憩網絡，持續以單車導覽行銷活動、特色商品開發等方式增加收入，來支撐旗山生活文化園區之營運。

雖然自行設法籌措的財源只能填補營運經費的50%，但促進會並不想放棄這份挑戰的動力與「樂趣」，這「樂趣」來自於與地方鄉親和遊客的互動，從互動中，觀察出人的喜好與需求。「我們推出西洋的音樂、舞蹈節目就爆滿，傳統戲曲的觀眾就寥寥可數」¹²，似乎是這個小鎮比起周遭鄉鎮更早接觸西化與現代化的印證。

四 日本的廢校再利用為藝術空間之現況

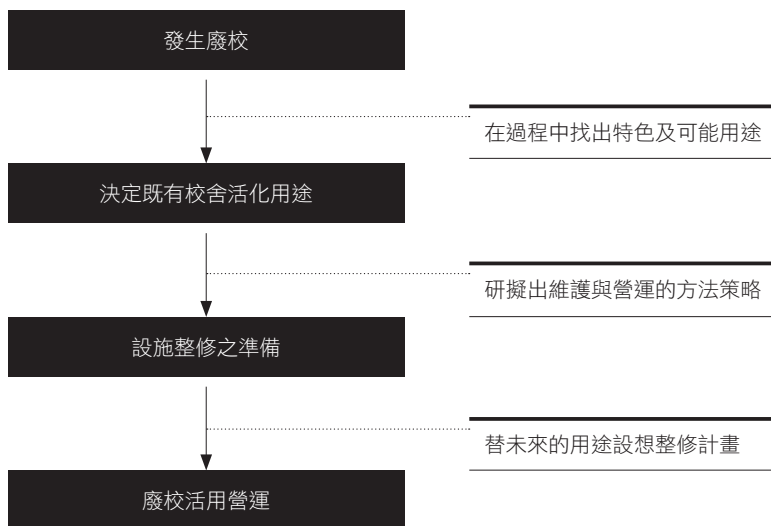
1. 日本的廢校政策與廢校建築再利用流程

日本並沒有嚴格、具體的廢校政策，文部科學省（中央）讓地方決定整併或廢校的標準，因為學校除了是維繫社區的重要平台之外，對多災害的日本而言，學校也是社區防災體系中重要的一環。再者，由於 1956 年文部省強力推行的「學校統廢合」遭受民

意反彈、發生弊端，自 1973 年後，文部省修正強硬的方式，避免不顧民意、衝突太大的整併校作業。¹³

然而，政府財政緊縮、少子化衝擊是迫在眉睫的問題，為有效控管人事經費支出，文部科學省將班級學生人數基準從每班 40 人降低為每班 35 人，公立學校的整併，則以通學距離為主要考量，建議小學生的通學距離上限是 4 公里，中學是 6 公里。¹⁴ 其流程如下圖。

圖 12 日本的廢校建築再利用流程

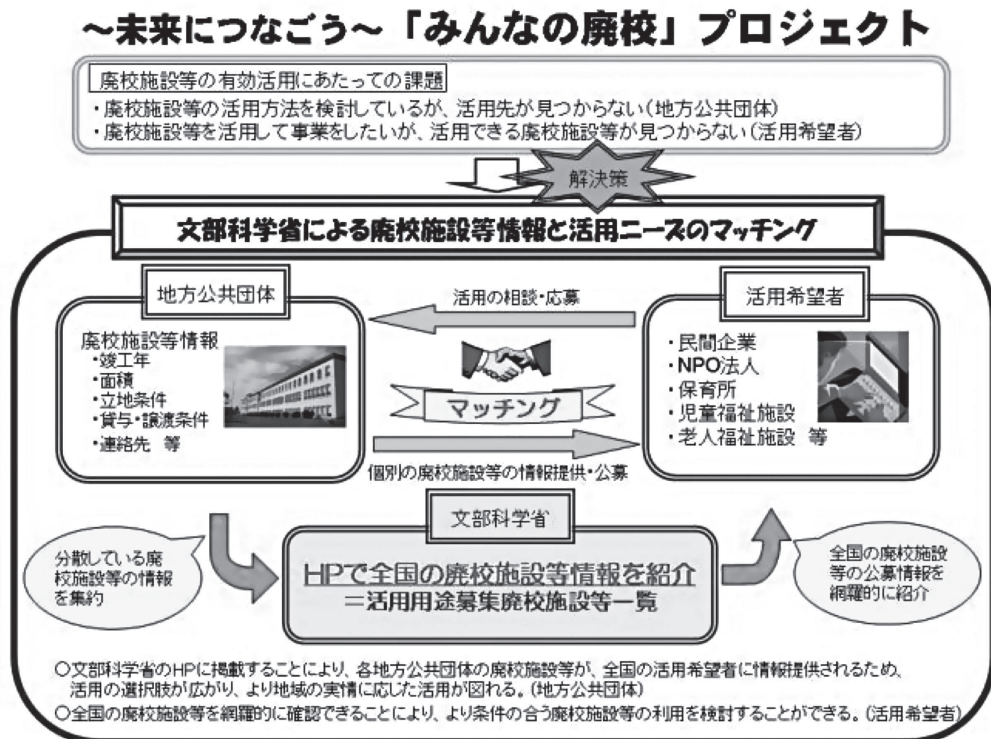


資料來源：作者參考日本文部科學省《廢校施設の実態及び有効活用状況等調査研究報告書》繪製

然而，雖無強硬的廢校措施，廢校數還是如雨後春筍在日本各地城市、鄉間冒出。日本文部科學省 2012 年統計，自 1992 年到 2011 年的 20 年間，全日本有 6,834 所公立中小學廢校，北海道 760 校，東京 389 校，居第一、第二高位，數量龐大的廢校一時間無法決定其命運，大多數只能暫時擱置，也讓近幾年日本年輕人的次文化中，多了廢校題材，如廢校鬼片、潛入廢校探險。於是，文部科學省開始介入廢校與民間

機構之間的媒合，讓廢校的資訊更即時、更透明，讓空間盡快找到新用途與新使用者，以免閒置過久，設施損壞殆盡，成為窳陋地區。（圖 13）截至目前，日本有超過 1,000 所廢校再利用，其中 29.46% 為體育設施，27.70% 為資料館或文化設施，12.38% 為社福或醫療設施，11.02% 為體驗交流設施（如研修、旅宿），其他為公部門、企業或社團法人辦公室。

圖 13 日本文部科學省積極媒合廢校與民間機構之過程



2. 日本的廢校再利用為藝術空間之案例

1. 藝術千代田 3331

位於東京繁華地段的練成中學於 2005 年廢校，足見日本都市核心也有人口結構問題，所幸，這個校園受到許多民眾的關注，在東京藝術大學任教、也是藝術家的中村政人教授，就是其一，在他的帶領與號召下，熱情的藝術家與社區居民參與這座廢校園的改造。

目前一樓為特展室與交誼活動空間，附設有一個輕食餐廳，2 樓至 3 樓有年輕藝術家發表會場、藝術單位及個人進駐工作室。不同於一般的高牆美術館，3331 刻意將與社區之間的圍牆拆除，並設置友善的坡道設施，讓空間更加親和，期望創造一般居民皆可自由進入享受免費藝術的空間。¹⁵（圖 14、圖 15、圖 16）

非常有趣的是屋頂運動場利用為菜園，是社區民眾的提議，現在有機菜園採會員制，以 1 坪為單位出租給附近居民，其特色強調：1. 不使用化肥，純有機；2. 屋頂有網欄包圍，鳥類不侵；3. 管理單位免費提供主要園藝工具；4. 工作人員每週 2 次定期澆水；5. 每月一次的有機耕種講座。這個菜園實現了都市人想親近泥土的夢想，創造了社區民眾的互動機會，也讓平時不接觸藝術的人進入藝術空間，是個非常有創意的點子，而此創意卻是來自民眾的需求，並非專家的規劃。（圖 17、圖 18）

至於「3331」的由來，也是個創意。日本從百年前就開始流傳「江戶一本締め」的鼓舞擊掌方式，其節

奏是連續三回三次快速的擊掌（3、3、3），最後再單拍一次（1），連續三回三次擊掌，總和為九，而「九」在日文的發音跟「苦」相同，所以，最後再一擊掌，等於為「九」加上一點，變成了「丸」，而丸在日文裡和「圓」同義，因此代表將「苦」逐出，終成「圓滿」。¹⁶

表 6 藝術千代田 3331 簡介

現名	藝術千代田 3331 [アーツ千代田 3331]
營運單位	合同会社コマンド A (Command A, LLC)
原校名	東京都練成中學校
簡史	2005.3.17 關閉 2006 千代田藝坊審查委員會提交練成中學校校舍活用計畫。 2009 獲得施工許可，第一期改造工程啟動。 2009.12.21 基金會訂名為「藝術千代田 3331」 2010.6.22 「藝術千代田 3331」盛大開幕
新用途	1 樓餐廳、開放空間和藝廊，展覽多為前衛藝術；2 樓有 7 個場地可做為年輕藝術家的發表會場，3 樓則是分享空間，可舉辦各種文化藝術活動；屋頂設有會員制菜園。



ご家族やお友達と一緒に楽しく野菜作りをしてみませんか？

3331屋上 3331 Organic Garden オーガニック菜園



春・夏野菜栽培の追加募集受付、5月20日（月）まで！

14 | 15

16 | 17

18 |

圖 14 藝術千代田 3331 開闢友善的入口 資料來源：作者拍攝，日期：2013 年 6 月 9 日

圖 15 1 樓餐廳 Food Lab 3331 資料來源：作者拍攝 日期：2013 年 6 月 9 日

圖 16 1 樓交誼空間 資料來源：作者拍攝 日期：2013 年 6 月 9 日

圖 17 屋頂菜園 資料來源：作者拍攝 日期：2013 年 6 月 9 日

圖 18 屋頂菜園招募「農友」廣告單 資料來源：藝術千代田 3331

2. 福武之家 Fukutake House

福田小學的所在位置是瀨戶內海的小豆島，過去此島以醬油、橄欖、石雕為主要產業，但近幾十年居民大幅減少，人口迅速老化，留下荒廢的房舍與土地，如同被人遺忘的小島。

瀨戶內國際藝術祭為3年舉辦一次的亞洲當代藝術盛會，由北川富朗總策劃，今(2013)年在投入地方教育文化的福武財團支持下，結合地方資源，將廢校的福田小學打造成福武之家，邀請台灣、香港、泰國、新加坡、印尼、韓國、澳洲等7國藝術家，以「亞洲如何面對全球化」為題創作，將閒置的小學教室化為展場，許多作品不僅呈現小豆島當地的生活樣貌，也透露出自身國家的困境。例如臺灣藝術家楊偉林的作品《布輪海》(圖19)，結合臺灣傳統藍染工藝將數千個布輪染色，懸掛呈現在廢校空間中，「布輪是用來打磨的工具，它消耗自己的生命，讓各種傢俱得以圓潤，但台灣的布輪產業卻在全球化的衝擊下逐漸沒落，小豆島從前以出口石材聞名，同樣因為全球化，被廉價的中國石材取代，如今只能刻墓碑。」¹⁷

這個藝術祭不以呈現藝術為最終目的，而是透過當代藝術將外地人(包括遊客和藝術家)吸引進來，是欣賞藝術，也欣賞包容、承載藝術的環境與歷史，並與地方互動，企圖以創意讓被廢棄的建築、被人遺忘的小島得以永續。因而藝術是包裝，真正的本質是振興地方。

表7 福武之家簡介

現名	福武之家 Fukutake House (2013年瀨戶內國際藝術祭)	
營運單位	公益財團法人福武財團、小豆島町、 福田地区連合自治会	
原校名	小豆島福田小學校	
簡史	1873	成立
	1947	新學制的福田小學成立
	2009	關閉。
	2013	瀨戶內國際藝術祭展場。
新用途	當代藝術展場	



圖19 居民徜徉在楊偉林的《布輪海》 資料來源：引自上下游 News&Market 新聞市集，<https://www.newsmarket.com.tw/blog/33925/>。林慧貞拍攝。

五 案例分析

1. 決策過程

從臺、日案例與統計可觀察出，少子化首先衝擊的是小學，小學所在的位置深入社區，與社區的關係密切，是地方的根基。當一座校園不再有琅琅讀書聲，不再有學生活動於操場上，要轉變為藝術空間的過程，民眾的參與是極為重要的，他們投射對空間的情感、提供貼切的在地看法，甚至加入改造後的維護與營運。日本政府會透過公聽會、文書、電話簡訊，鼓勵民眾參與討論，並由專業者從旁協助，決定廢校建築未來的命運，還有些案例是由地方居民提出需求、計畫和願景，甚至自主籌款，以「由下而上」(bottom-up) 的方式主導空間的再利用。

不同於日本文部科學省同時具有教育與文化事權，在臺灣，學校的主管機關是教育部，推動藝術文化的是文化部，兩大部未在廢校再利用議題上積極互動，因而在中央沒有清楚的指導方針，地方只能憑有限的資源能力去進行，稍能達成的是硬體的維護，遑論需要長期關注的輔導經營、創意行銷等。

哈伯瑪斯 (Jürgen Habermas) 認為「公共領域」是私人 (private persons) 的聚集，透過共同空間 (metatopical space) 的創造，最後創造出一個公眾。日本做為一個較為成熟的公民社會，人民較熟稔如何將個人意見透過正常管道表達出來，政府也清楚整合民意的重要性，有意思的是，投入廢校空間創作與經營的藝術家和藝術行政者重視社區，也極力將社區導引成廢校空間永續的資源。然而，在臺灣，民意有時

是政治的、激烈的或冷漠的，就如一般民眾面對生活環境中的公共藝術，大多仍抱持一種旁觀者的姿態，缺乏認同及主動參與的責任及義務感。¹⁸

2. 藝術空間之選擇

臺、日兩國的案例之共同點，是偏好的藝術空間形式不是靜態的、菁英的美術館，而是有消費、有休閒、有體驗，涵括視覺、聽覺、味覺多種感官的複合型社區藝文中心，意味著生活化、親和的接觸藝術方式較受歡迎，同時也希望空間保有多種功能的彈性。對有民眾參與的案例來說，這可以說是社群的生活風格 (life style) 之選擇，隱隱呈現的是該地區的社會脈絡。

而對藝術工作者來說，這是個「後替代空間」，就如姚瑞中所言：「藝術產業資源緊縮，具有批判能量的『替代空間』也開始採取同時兼顧生存、更為靈活的經營姿態。」¹⁹「『後替代空間』本著以藝術家為中心，所維持的實驗性、獨立性、自主性、學術性、機動性為主軸；換句話說，可以有市場嗅覺但不一定被市場牽著走、有理想但不一定立場鮮明地與政策對立、有學術性但不一定要吊書袋故弄玄虛，若為了藝術大局可以適度妥協但不必然抱著觀眾大腿。」¹⁹

六 結語

廢校空間從 A 用途轉變到 B 用途，不單只是都市計畫上一個學校用途別的改變，也不單是建築師和營造廠的硬體工程改修，而是代表社會與人口結構的變遷，此變遷涉及民眾情感與集體記憶，在利害關係人

的互動牽拉間，讓學校空間轉變了身分與內容，甚至命運，因而藝術成為舊建築的新內容，應該植基於社區民眾的意願選擇，並承載期待與寄託。當藝術進入到這些與社區息息相關的基本單位，就形成鄰近社區、門檻相當低的藝術市場，每個人都有機會親近，它包羅了藝術、休閒、消費、地方產業為一體，所以藝術成為永續地方命脈的重要手段。

以目前臺灣逐漸下滑的生育率觀察，未來臺灣的廢校問題將日趨嚴重，倘若有眾多校園閒置釋出並轉變為藝術空間，藝術產業的進駐勢必要深入地方、體察地方性、與民眾互動密切，因而生活化、在地性、多樣貌將是其所趨，另高齡化社會的藝術推廣也是未來的重要課題。

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Thematic Paper Session

Transforming Closed Schools into Art Spaces – an Observation on Taiwan's and Japan's Current Conditions

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Paper Session I / Industrial Environment & Trends

Abstract

Lower fertility rate, domestic migration and calamities are three major factors that have led to the increasing closed schools in Japan and Taiwan. Both countries have made efforts to transform closed schools into art spaces, yet with differing operating methods, hence producing different consequences and outcomes. This paper scrutinizes the cases pertaining to the transformation of closed schools into art spaces and explores the relationship of the local communities and the art workers who employ such schools as their base. With more closed schools across the country, Japan boasts a wider experience in changing closed schools into art spaces, which, coupled with more advanced social developments than Taiwan, makes Japan a model from which the operating methods are worth discussion and emulation.

Keywords: closed school, art space, population structure

I Introduction:

According to statistics by the Ministry of Education as of October 2012, a total of 178 schools were closed down since the number of students has plummeted over recent years. Factors that cause the increase of closed schools include low fertility rate, domestic migration and calamities. Most notorious examples are Pingtung County, Kaohsiung City and Hualien County, in which the closed schools amount to 25, 24, and 20 respectively. According to a survey conducted by the MEXT of Japan in 2012, about 6,834 public schools (elementary and middle schools

included) were closed down from 1992 through 2011. Among those closed schools, Hokkaido was ranked as #1 with 760 closed schools, while Tokyo, with 389 closed schools, followed next. This phenomenon indicated that border towns and metropolises face the same population structural problems and socio-economic issues. In the past years, the stringent fiscal measures of the government and a stalemate of local industries and national economy have both contributed to the reuse of deserted spaces.

II Factors Associated with Closed Schools:

In Taiwan and Japan, the main reasons associated with closed schools are very similar, with low fertility rate, domestic migration and calamities as top three factors. Only that the conditions in big cities and borderline towns differ in some ways.

1. Low Fertility Rate:

Affected by economic downturn, the birth rates in Taiwan and Japan have hit the bottom over the past years. From 2005 to 2010, the fertility rate in Taiwan was respectively 1.05 and 1.27 in Taiwan and Japan¹. Such fertility rates have led to a trend of fewer children in a household and the plummeting rate of enrollment in schools. The statistics have shown that the people aged 0-14 in Japan in 1990 occupied 18.2% of the whole population, which dwindled to 13.0% in 2010², whereas the people aged 0-14 in Taiwan in 1990 were responsible for 27.3% of the whole population, which plummeted to 14.63% in 2010³. This demonstrated Taiwan has had a more serious condition than Japan.

2. Domestic Migration:

Rural people consider migration due to rather different reasons than urban people. In rural areas, people are encountered with fewer job choices, poorer public transportation and facilities, whilst in big cities, young people can barely afford the price of owning an apartment or stand the wretchedness of old houses and have no choice but to move to suburbs or newly developed areas. This is named as the “donut phenomenon,” as the core of a city is emptied of population when the outer skirts of a city are populated with large numbers of residents.

3. Calamities:

Both countries are located near the Circum-Pacific Seismic Zone and are prone to typhoons in summer. In recent years, several disasters such as the 921 Earthquake (in 1999), the Typhoon Morakot (in 2009) Moract occurred in Taiwan, whereas an earthquake that took place in the northeast area of Japan triggered tsunamis, floods and disasters of radiation round the surrounding regions, causing immeasurable damages to common houses, public facilities and schools and making some of the buildings beyond reconstruction or non-inhabitable. People cannot but move out of such areas.

III Taiwan’s Present Condition of Turning Closed Schools into Art Spaces

1. The School-closing Policy and the Procedures regarding the Reuse of the Buildings of Closed Schools

The initial school-closing policy was dated back to 1987, when the Education Office of Taiwan Provincial Government (hereunder referred to as the Education Office) promulgated the “Guidelines governing the Merging of Small-sized Schools”. Four years later, the Ministry of Education proposed a conceived plan about merging schools that have fewer than six classes, which did not come to pass. Some local governments, however, started to push the merging of schools due to stringencies. In 2004, the Control Yuan members, Huang Huang-hsiung, Chao Jung-yao and Lu His-mu, came up with a review report about the “Allocation of Budgets from the Ministry of Education,” in which they recommended that all county and city governments should close and merge the schools with fewer than 100 students so as to save annual personnel expenditures that are up to TWD 5.1 billion⁴. Considering the decreasing number of children in every household, many county and city governments have begun to take sweeping actions toward school merging, although the standards differed. In principle, local governments adhered to the “Guidelines governing the Merging of Small-sized Schools” promulgated in 1987 and the “Principles regarding Management of Elementary to Middle schools Merging” enacted by the Ministry of Education in 2008. Yet still some cities or counties did not make clear their principles with regards to school closings. Table 1 is the chronology of school closings and merging.

Table 1 Chronology of School Closings and Merging

Time	Measures
May 1987	<p>The Education Office promulgated the “Guidelines governing the merging of small-sized schools,” which is believed to be the first guidelines concerning the closings and merging of schools. Key points are as follows:</p> <ol style="list-style-type: none"> 1 After merging, no students are allowed to live in campus. 2 After merging, all students can safely get to school within 1-hour walking distance. 3 After merging, all students shall be able to arrive at school with neither shuttles nor longtime commutes. 4 Any schools comprised of fewer than three classes (including branch schools) or below 50 students with a tendency toward declining over the last years. 5 Small schools can adopt a free-district policy and submit proposals to the Education Office, so as to accommodate pupils. 6 Other conditions that require school merging.
1989	Some local governments started to take actions by closing small schools that were comprised of fewer than 50 students or in which there were fewer than 10 students for each class. By taking into consideration individualistic conditions, actual needs, opinions from parents, students’ academic performances, transportation, and other feedbacks from the area’s residents, such local governments closed or merged small schools on a yearly basis.
1994	<p>The Education Office conducted the “review conference for small-sized schools,” where conclusions were reached as below:</p> <ol style="list-style-type: none"> 1 Small schools are by definition not limited to remote or mountainous areas. Any schools of which the number of students is not over 40 can be put under inspection for merging. 2 Basically two or three schools are merged into one school. Each grade shall not be comprised of over three classes, with no more than 40 students being included in a class. 3 Each local government shall choose those schools that may encounter fewer obstacles for trial merging. 4 The original school can be transformed into a cultural or social center in which community activities can be taken charge by professionals or mentors.
1996	The Education Office broached a merging project for small schools with an objective of closing five schools each year.
2001	The Ministry of Education suggested local governments stipulate relating package measures to address the closings and merging of small schools.
May 2004	The Control Yuan members, Huang Huang-hsiung, Chao Jung-yao and Lu His-mu, came up with a review report about the “Allocation of Budgets from the Ministry of Education”.
2005	The Ministry of Education consigned scholars and experts including Hou Shih-chang, Wang Pao-chin, Yang Yin-hsing, and Tseng Jung-hua to conduct research on the “Development of Small-sized Elementary Schools and Best Operational Size for Elementary Schools” before holding a meeting for the “Best Operational Size for Elementary Schools and Transformation Strategy—Workable Policies for Small School Merging,” where a resolution was forwarded to create objective indicators for closings and merging of small schools.
2006	The Ministry of Education proclaimed “Indicators for the Development of Small Schools”.
2007	The Ministry of Education proclaimed the “Development Program for Feature Schools” and the “Diversified Plan for Unused Campuses and School Buildings” in hopes of encouraging local governments to take proactive actions in developing feature schools.
2008	The Ministry of Education consigned scholars and experts, such as Cheng Tung-liao, to conduct a study on the “Reinvention of Remote-area Elementary Schools” and submit a report accordingly. In November, the Ministry of Education declared the “Principles regarding Management of Elementary to Middle Schools Merging” for all cities and counties involved to comply.

According to the statistics by the Ministry of Education in 2012, a total of 178 schools were closed (see Table 2) as of that year. The reuse of such closed schools were categorized into the following types: culture-related and education (19.33 %), recreation and tourism (36.97 %), social welfare (2.52 %), employment of institutions or organizations/ maintenance by the school (31.09 %), and return of land/ demolition (10.08%)⁵.

The reuse of all these school buildings shall have been conducted according to the procedures formulated by the “Principles regarding Management of Elementary to Middle schools Merging” in 2008 (Figure 1) and the system of building reuse and procedures adopted by the “Activating Campus Space Planning Program” in 2007 (Figure 2). Yet the local government did not abide by the above programs or procedures. Take “Chiayi County’s Small Schools Transformation and Development Procedures” for instance. (Figure 3)

Table 2 The Distribution of the Buildings of the Middle and Elementary Schools Nationwide

City/ County Name	Reuse	Waiting to be reused	Subtotal
Taipei City	1	0	1
New Taipei City	15	2	17
Taichung City	0	3	3
Tainan City	13	5	18
Kaohsiung City	22	2	24
Keelung City	3	0	3
Taoyuan County	2	1	3
Hsinchu City	5	0	5
Miaoli County	2	1	3
Nantou County	1	3	4
Changhua County	2	0	2
Yunlin County	3	1	4
Chiayi County	8	10	18
Chiayi City	1	0	1
Pingtung County	15	10	25
Taitung County	10	5	15
Hualien County	15	5	20
Ilan County	6	0	6
Penghu County	4	2	6
Total	128	50	178

Updated: October 2012

Source: the statistics from the Ministry of Education

Figure 1 Elementary to Middle schools Merging Procedures

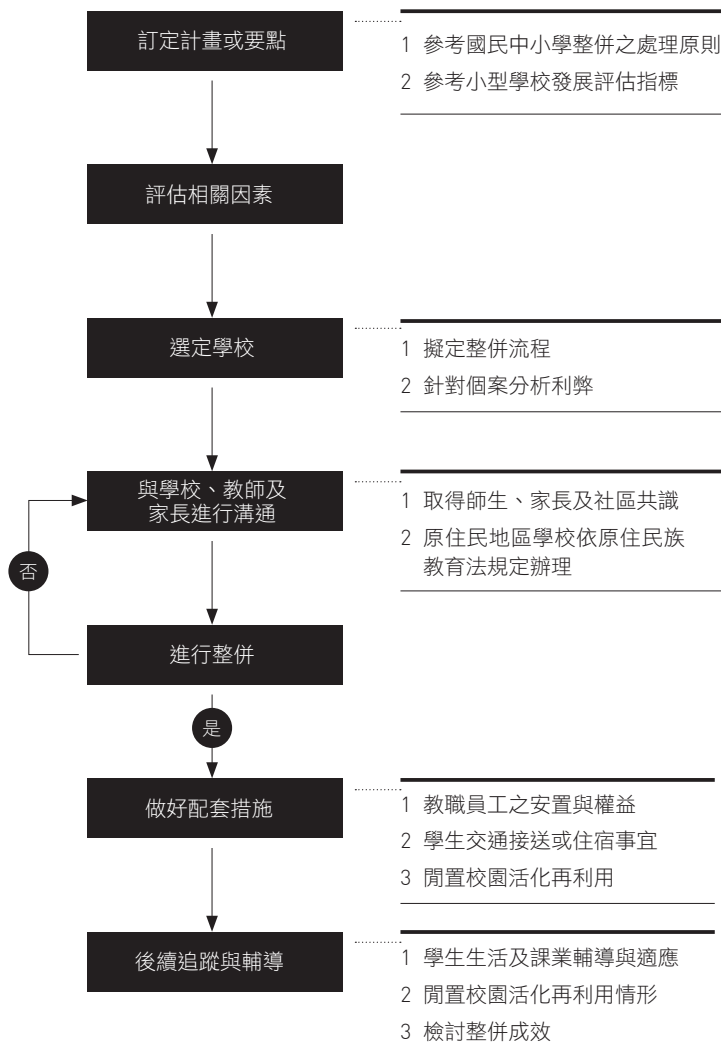
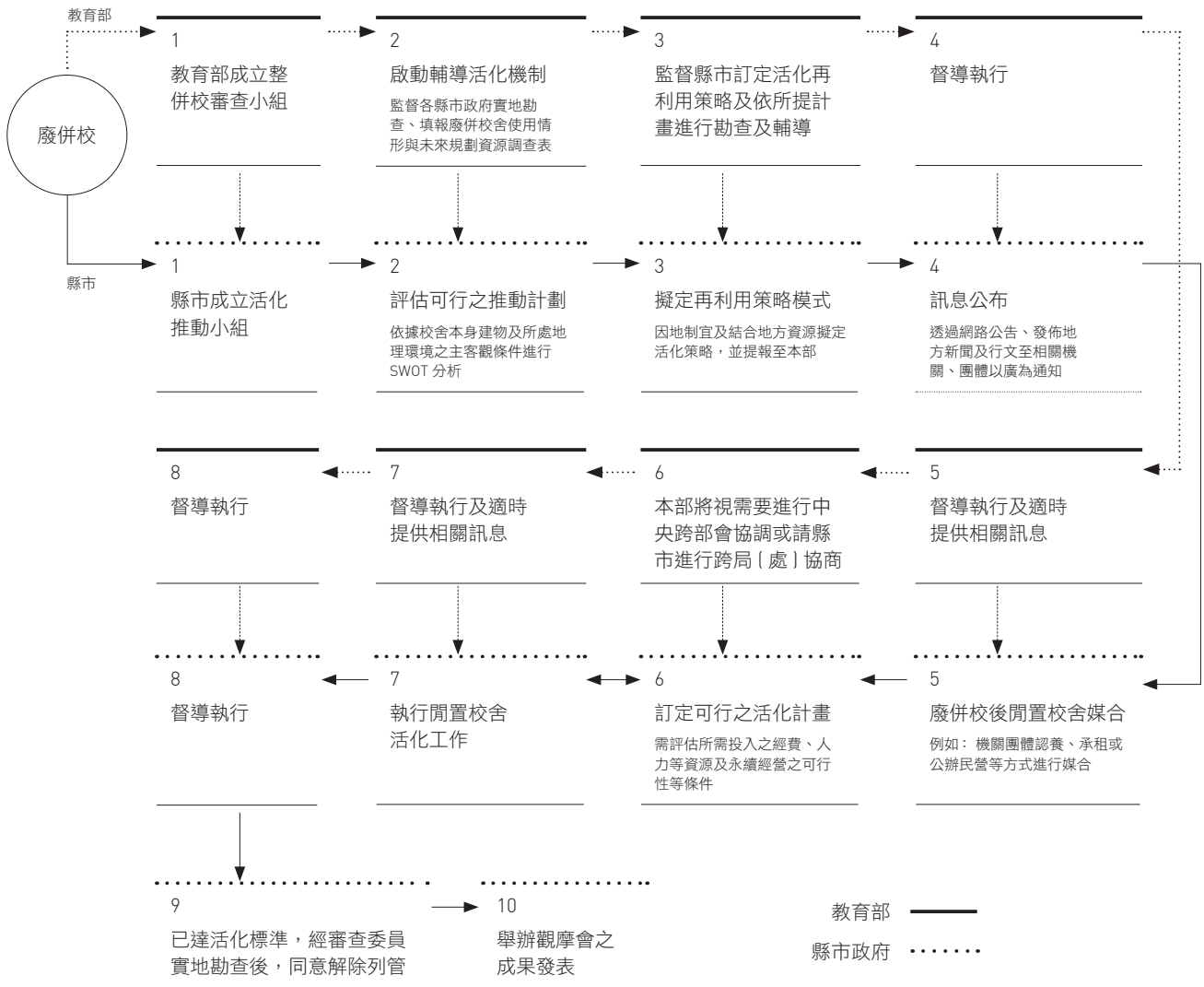


Figure 2 The System of Reuse of School Buildings and Procedures

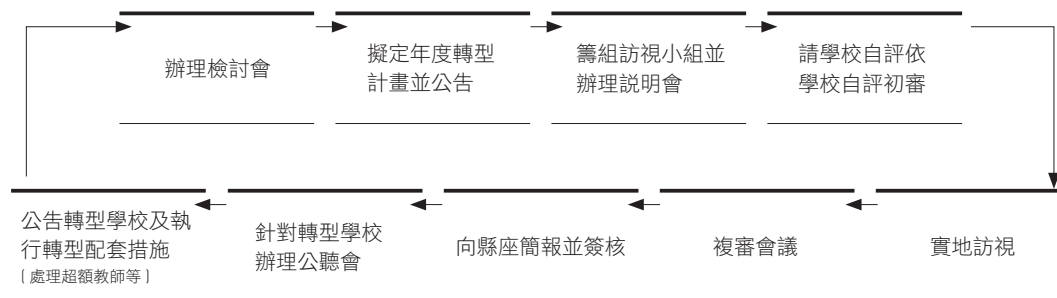
整併校活化再利用機制與作業流程



It was supposed to hold a public hearing to listen to what the public was concerned about. In reality, however, the hearing was only conducted after the official documentation had been delivered to the magistrate for approval. Hence this public hearing did not produce the desired result and all the decisions from whether the school should be closed, how to reuse the school buildings, to making arrangements for the teaching staff and students, were solely directed by the government. The top-down process and lack of communication led to a surge of protests by students and their parents to the magistrate and shortly after even litigation. Cheng Tung-liao described the actions as being “rude and violent” by pointing out that the local government mistreated the poor (with lower income), the foreigners (families with a foreign spouse), and the less privileged (who were vulnerable and did not know about protests) while cutting off the connection of the children and local cultures, breaking the bond of local communities and cultural centers, destroying the foundation for future social developments, and ravaging the motherland that is the source for the locals.⁶

As the small-sized schools was shut down on by one, the Ministry of Culture (previously as the Council of Cultural Affairs) began to promote such policies as “community overall empowerment,” “reuse of unused space,” “welcoming art into the space,” and building the “local cultural center” and “life aesthetics center” so as to vitalize the area and increase tax revenue as a result. Even though the Ministry of Education and the Ministry of Culture do not either face similar problems or have direct cooperation, both have adopted very similar policy directions and suggested that the closed schools be changed into art space. Such a seemingly adroit handling way did not beget positive results, however. Most of the closed schools were flooded by weeds and mosquitoes, and hence inviting thieves to take whatever was left there, which in turn became a concern for the neighboring communities. Such mosquitoes-ravaged transformed centers triggered new issues for the locals⁷.

Figure 3 Chiayi County's Small Schools Transformation and Development Procedures



2. Cases regarding the Closed Schools Changing into Art Spaces in Taiwan

1. Tsung-Yeh Arts and Cultural Center (of Tainan)

Tsung-Yeh Elementary School might be one of the most well-known cases for closing a school. Its short history is as Table 3. In May 2008, the then-magistrate Su Huan-chih urged to incorporate Tsung-Yeh Elementary School into Wen-Cheng Elementary School. At that time, there were 156 students in Tsung-Yeh Elementary School, whereas only 111 students were enrolled in Wen-Cheng Elementary School. Since the former was planned to be included in the campus of Tainan National University of the Arts, as part of the Tsung-Yeh Arts and Cultural Center. The county government decreed the administrative staff and teachers go to the newly appointed school the following semester. This sudden order (without any negotiation beforehand) perplexed and annoyed the people involved, teachers, students, parents and alumni alike. They decided to organize a campaign over anti-merging, as Cheng Ya-hsin, the representative of the students, filed an appeal in July. After the Ministry of Education scrutinized the situation and revoked the original order (NO. 0970121189C official documentation, July 14, 2008). While the society focused attention on this case where primary schoolers beat the county government, the county government worked in unusual efficacy and merged the two schools as previously scheduled. On August 1 of the same year, the 60-year-old Tsung-Yeh Elementary School was officially merged into Wen-Cheng Elementary School. The litigation case lasted for four years. In June 2011, the Supreme Court decided to dismiss the plaintiff's further appeal and closed the case.

The closing of Tsung-Yeh Elementary School was not due to the number of students or orders from the Ministry of Education. Put differently, it was closed on illegalized grounds. The series of protests and litigation greatly affected the rights of the students, parents and teachers, not to mention the harmonious atmosphere of the community. Tainan National University of the Arts, which intended to create the Tsung-Yeh Arts and Cultural Center as an international “life and craftsmanship creative aesthetics and cultural park,” has yet to enter the park. After city-county merging, Tainan City Government has made offices and classrooms of a cultural and arts center out of the Tsung-Yeh Elementary School buildings. Roughly 600 people use the center every year⁸. The sugar plants that were built during the Japanese-colonized period were most frequently used. (Figure 4-6).



Figure 4 Map of the Tsung-Yeh Arts and Cultural Center
Source: Official Website of the Center at http://tyart.tnc.gov.tw/04_guide/index.php Browse date: August 25, 2013

Table 3 Introduction to the Tsung-Yeh Arts and Cultural Center

Current Name	Tsung-Yeh Arts and Cultural Center
Operating Unit	Cultural Affairs Bureau, Tainan City Government
Previous Name	Tsung-Yeh Elementary School
History	<p>Founded on March 16, 1947, named as Tai-Sugar Tenth Elementary School.</p> <p>Name was changed to "Tainan County Private Tai-Sugar Third Elementary School" in February 1948.</p> <p>Name was changed to Tainan County Tsung-Yeh Substitute Elementary School in April 1949.</p> <p>Tai-Sugar Company transferred the operating affairs of the affiliated schools to the local government on August 1, 1968. School name was changed to "Tainan County Tsung-Yeh Elementary School".</p> <p>In May 2008, the then-magistrate Su Huan-chih proposed to incorporate Tsung-Yeh Elementary School into Wen-Cheng Elementary School, which bewildered the alumni as well as teachers, students and parents. Campaigns against merging commenced.</p> <p>On August 1, 2008, the above two schools were merged and the former became a part of the Tsung-Yeh Arts and Cultural Center.</p>
Presently Used as	The offices and classrooms of the arts and cultural center, and is intended for artists to work here.



Figure 5 The Previous Condition of the Tsung-Yeh Elementary School Source: the author Date: September 6, 2013



Figure 6 Poster of the 2013 Relic Day Source: Cultural Affairs Bureau, Tainan City Government at <http://culture.tainan.gov.tw>

2. Alilao Arts Space (in New Taipei City)

This arts space, previously the Chien-Hua Elementary School Tsao-Li Branch, is located at the northern tip of Shihmen District, New Taipei City (Photo 7). Embracing excellent scenery, this school is situated in a remote area, neighboring the NO. 1 Nuke Plant. Most of the parents made a living by fishery or farming and could barely get by. Many people migrated to other towns or cities, and therefore in 2005, the Chien-Hua Elementary School Tsao-Li Branch was closed, of which the students were made to enroll in main campus of the Chien-Hua Elementary School. The Tsao-Li Branch was deserted since then. (Brief history is as Table 4).

During the five years in which the school was abandoned, quite some educational institutions and private-sector organizations expressed their interest in using this school for football practice or as a pop music center. Finally the Daydreamer Craftsmanship Club stood out from the audition, and its chief leader Mr. Chang Ke-ming has taken charge of this place. Presently this place is used for Mr. Chang's studio and collection place for drifted woods, with cafés (couple with a gallery) and craft-art practice classrooms for visitors. Most of the visitors come from Larger-Taipei Area. On weekends, they come to the Northeast Coast for fresh air and oceanic views, and only drop in the Alilao Arts Space. A lot of the online discussions center on the cafés with a marvelous view. (Photo 8)

Since the parents of the Tsao-Li Branch's students were less inclined to take an active role in school's affairs, with higher percentages of low-income households (14%), newly migrated residents

(38%) and grand-parenting/ single-parenting (18%)⁹, these parents did not engage in the decision making for reusing the campus. As a consequence, the Alilao Arts Space has been estranged from the community, which means the local people do not visit this arts space or partake in arts activities. Without reciprocal actions from the arts space and understanding, this arts space is seldom used on working days.



Photo 7 The Gate to the Chien-Hua Elementary School Tsao-Li Branch
Source: the author Date: August 30, 2013



Photo 8 Daydreamer Craftsmanship Club along with a café at Alilao Arts Space
Source: the author Date: August 30, 2013

Table 4 An Introduction to Alilao Arts Space

Current Name	Alilao Arts Space
Operating Unit	Mr. Chang Ke-ming, a craft potter
Previous Name	Chien-Hua Elementary School Tsao-Li Branch
History	<p>In 1909, Chinpaoli Public School Alilao Branch was founded.</p> <p>In 1921, the name was changed to Laomeikung School Chien-Hua Elementary School Tsao-Li Branch.</p> <p>In 1945, the main campus was changed to Chien-Hua Public School.</p> <p>In 1968, the main campus was changed to Chien-Hua Elementary School.</p> <p>In 1976, the school was moved to Tsao-Li.</p> <p>In 2005, Tsao-Li Branch was closed, of which the students enrolled instead in the main campus Chien-Hua Elementary School.</p> <p>In 2007, Chinese Taipei Football Association offered to rent this place.</p> <p>In 2009, Taipei County Government (presently New Taipei City Government) proposed to change it into Crown Coast Pop Music Center.</p> <p>In December 2010, Alilao Arts Space opened.</p>
Presently Used as	Hybrid arts space where pottery studios, craft practice classroom, handmade soap DIY classroom, and cafés can all be found.

3.Cishan Living Cultural Park (in Kaohsiung City)

Cishan Living Cultural Park is previously Kushan Elementary School, an educational institution solely for the Japanese and local renowned families during the Japanese-colonial period. Kushan Elementary School was not closed; rather, the renovation of this school was due to its original narrow space and aged school buildings on campus. Kaohsiung County Government thus decided to construct new buildings at the new site on Yen Ping Road, and moved the school's staff and students over there. Old buildings were transferred to the Bureau of Cultural Affairs, Kaohsiung County Government. Kushan Elementary School was appointed as the county's historical monument. In 2005, the county government announced a public tender project titled as "Kaohsiung County Cishan Living Cultural Park Consignment Project". The bid winner was Cishan Town Image Shopping District Association. (See Table 5 for brief history)

Cishan was once renowned for its exportation of bananas. (Photo 10 and 11) During its glorious period from 1967 till 1971, banana farmers reaped a great fortune. At that time, the Cishan Farmers' Association was ranked # 1 for its amount of deposits. In recent years, the glory faded into oblivion. In 1999, the local people therefore decided to organize the Cishan Shopping District Committee to develop a new model of coordination and cooperation. By recruiting

Table 5 A Brief Introduction to Cishan Living Cultural Park

Current Name	Cishan Living Cultural Park
Operating Unit	Cishan Town Image Shopping District Association
Previous Name	Kushan Elementary School
History	<p>Founded in 1909, named as “Yam Liao Common High-level Elementary School”. It was aimed to provide education for the Japanese’s kids and the children of the local renowned families.</p> <p>In 1922, the school name was changed to “Cishan Common High-level Elementary School”.</p> <p>On April 1, 1941, the school name was altered to “Cishan Public School”.</p> <p>In 1968, the school name was changed again to “Kushan Elementary School”.</p> <p>In 2000, this school was appointed as the county-level historical monument.</p> <p>In 2001, new school buildings were completed on Yen Ping Road. All teachers and students moved to the new site since then, while Kushan Elementary School was transferred to the Bureau of Cultural Affairs, Kaohsiung County Government.</p> <p>In 2005, the county government announced a public tender project in hopes of vitalizing the space of the school.</p> <p>In 2006, Cishan Town Image Shopping District Association moved in the closed school and started running the space.</p>
Presently Used as	Cishan Cultural Center, administrative offices and travel information center, old-classroom (for display), offices for clubs, and concert halls. This has become a place to tie the bond of the Cishan people and display artistic, cultural, living as well as tourism values.

the help from the Town Office and the county government, the Association bid for the shopping districts review project, directed by the Ministry of Economic Affairs, and were among the final bidders with its diversified cultural and humanitarian features. From this time onward, a shopping district model commenced.

In 2003, the Cishan Shopping District Committee was changed to the name as “Cishan Town Image Shopping District Association,” in which the qualification for membership was loosened to include all the townspeople. Presently the objectives of the Association are “humanitarian care, community service, and tourism development”. In 2006, this Association began to take on the task of vitalizing the old buildings of Kushan Elementary School, emphasizing on “constructing a space filled with artistic, cultural, living, and tourism values, where the local people all enjoy”¹⁰. For the time being this closed school is divided into Cishan Cultural Center, administrative offices and travel information center, old-classroom (for display), offices for clubs, and concert halls¹¹. Aside from subsidies from the governmental sector, the Association has maintained

an autonomy by putting forth efforts in connecting with the Cishan Railway Station (currently the local cultural center) and the old street's shopping district and conducting activities such as bike touring and featured commodities. By so doing, they have made more money to support the operations of the Cishan Living Cultural Park.

Although the increasing sales income is only half of the operating expenditures, the Association does

not want to give up on this challenge and the fun, which comes from the warm-spirited interactions with the tourists. From the interaction, they have observed the trend and the tourists' likes and dislikes. "We find the activities of western music and dancing very popular, while the traditional theater lacks the audience most of the time."¹² This seems to be a testimony to the town's earlier contact with modern life and western culture than the surrounding towns.

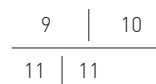
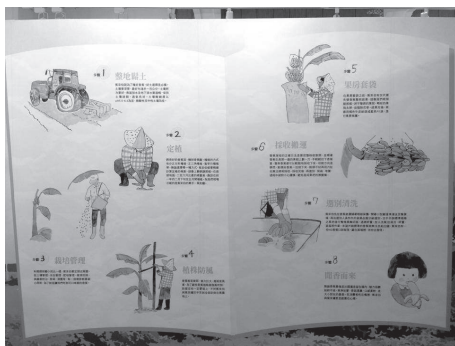


Photo 9 The Current Condition of the Previous Kushan Elementary School Source: the author Date: September 7, 2013

Photo 10 The Exhibition of the "Cishan Banana Kingdom" in an Old Classroom Source: the author Date: September 7, 2013

Photo 11 The "Cishan Banana Kingdom" Display Source: Cishan Town Image Shopping District Association

IV Japan's Present Condition of Turning Closed Schools into Art Spaces

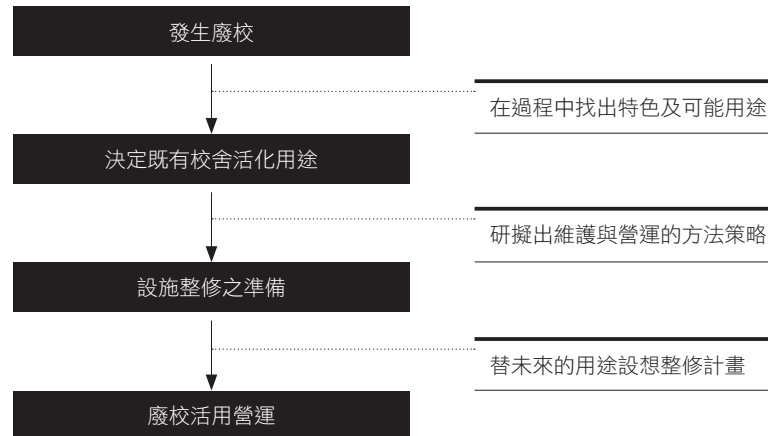
1. The School-closing Policy and the Procedures regarding the Reuse of the Buildings of Closed Schools

As a matter of fact, Japan does not formulate detailed policies to deal with school closing. The MEXT releases the power to local governments to decide on merging or closing schools. For Japan, schools play a pivotal role in community's collective spirit and disaster prevention system at the same time. In retrospect, the MEXT had forcibly pushed the "School Merging, Closing and Incorporating" in 1956, which led to wide dissents and fierce protests.

Since 1973 onwards, the MEXT adopted a softer attitude in case violent protests happen again¹³.

The stringent budgets of the government and fewer children of every household were two issues needing to address. To more effectively control the expenditures on personnel, the MEXT adjusted the standard of the student number of each class to 35 from 40. As to the merging of public schools, the commute was the main factor taken into consideration. It was recommended that the commute distance not exceed four kilometers for primary schoolers and six kilometers for junior schoolers¹⁴. The process of transforming closed schools is as the following figure.

Figure 12 The Process of Reusing the Closed Schools' Buildings in Japan

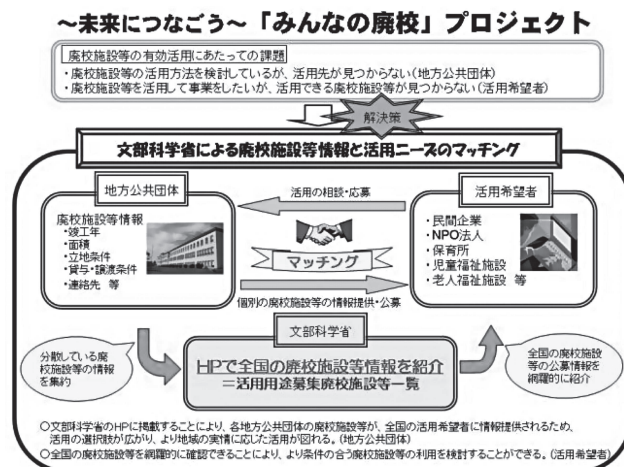


Source: drawn by the author by reference of the MEXT's The Report on the Investigation and Scrutiny of the Actual Condition and Reuse of Closed Schools in Japan

Although there have never been any strict school closing plans in Japan, the number of closed schools has seen a rapid growth over the years. According to the survey by MEXT in 2012, during the period from 1992 through 2011, 6,834 public middle and primary schools have been shut down, with Hokkaido ranking #1 (760 schools), followed by Tokyo with 389 schools. As the number of closing schools was strikingly high, most of them were unused and remained abandoned. This explains the emergence of closed schools as a popular theme for the Japanese young people, such as horror movies or adventures round closed campus. Therefore the MEXT began to take initiatives to connect closed

schools and privately-owned organizations by making the information concerning closed schools more instant and transparent in hopes of locating prospective users for these closed schools lest the facilities and the surrounding area should become decrepit due to lack of use. (Figure 13) Up to the present, over 1,000 closed schools have been regularly reused, among which 29.46% are for sports facilities, 27.70% for cultural or information centers, 12.38% for welfare or medical facilities, 11.02% for centers of experience and exchange (such as short-time study or lodgings), and the remaining part is dedicated to the offices of government agencies, firms or other non-profit associations.

Figure 13 The MEXT's Process of Connecting the Closed Schools with Privately-owned Institutions



2. Cases regarding the Closed Schools Changing into Art Spaces in Japan

1.3331 Arts Chiyoda

Even it was situated round the bustling area, Rensei Junior High School was shut down in 2005, serving as a proof of the population structural problem in Japan's urban areas. Luckily, the school won a wide attention from the civilians. As an artist and a professor at Tokyo University of the Arts, Nakamura Masahito was leading enthusiastic artists and the vicinity's residents in the reconstruction of this closed school.

Presently the ground floor is for special display and a lounge, complete with a light-food lab. The first and second floor is dedicated to exhibition spaces, offices and studios for artists. Differing from other walled museums, 3331 Arts Chiyoda tore down the walls and built user-friendly ramps as a gesture to wholeheartedly welcome the residents into the arts space¹⁵. [Photo 14-16]

Most interesting is that the roof space is cultivated into a vegetable farm, which was suggested by the community residents. Currently it is joined by members from the vicinity's people who pay the rent. This vegetable farm stresses that 1. No use of

Table 6 A Brief Introduction to 3331 Arts Chiyoda

Current Name	3331 Arts Chiyoda
Operating Unit	3331 Arts Chiyoda
Previous Name	Tokyo Rensei Junior High School
History	Shut down on March 17, 2005 In 2006, 3331 Arts Chiyoda Review Committee submitted a plan for reusing the closed school's buildings. In 2009, construction permit was received. The first phase construction commenced. On December 21, 2009, the Foundation was named as 3331 Arts Chiyoda. On June 22, 2010, the 3331 Arts Chiyoda saw a grand opening.
Presently Used as	Food lab, gallery and open space for the ground floor. Stressed avant-garde exhibitions. A total of seven spaces can be used for young artists to hold exhibitions on the first floor. The second floor is a space for sharing, where all sorts of cultural events are conducted. On the roof is a vegetable farm (by membership).

Photo 14 3331 Arts Chiyoda's Spacious and User-friendly Entrance
Source: the author Date: June 9, 2013





15 | 16

17 | 18

Photo 15 Food Lab 3331 Source: the author Date: June 9, 2013

Photo 16 the Lounge on Ground Floor Source: the author Date: June 9, 2013

Photo 17 Vegetable Farm on Roof Source: the author Date: June 9, 2013

Photo 18 Flier that Invites Like-minded Friends to Join in Farming Source: 3331 Arts Chiyoda

chemical fertilizers; 2. Having a gridding fence and preventing birds; 3. The responsible unit provides gardening tools without further payment; 4. Working staff waters this vegetable farm twice a week; 5. Organic planting seminar is held once per month. This vegetable garden realizes the urban people's collective dream in getting close to the land and earth, let alone providing them more opportunities to interact with one another and get in touch with art. It is worth mentioning that this creative idea was offered by the common people, rather than professionals. (Photo 17-18).

The name "3331" has a special meaning too. About a century ago, the palms-clapping dancing became popular across Japan, which was named as edo tejime, featured with three-times quick palms-clapping (3, 3, 3) followed by 1 final beat. The total number of clapping is nine, which in Japanese the language is pronounced similarly to the word "suffering," and the final beat means a dot placed on "nine" the number (in Chinese character) and becomes "ball" in Japanese, which shares the same meaning of "roundness," signifying forgoing suffering and getting the ultimate happiness¹⁶.

2. Fukutake House

Situated at the Shodoshima Island, Fukuda Elementary School was founded in an area boasting soy sauce, olive and stone carvings. Over the past decades, the aging population grew dramatically with few young people still inhabiting in this area. This island seemed to be forgotten by the world, with only decrepit houses and land remaining.

The Setouchi International Art Festival is a grand Asian contemporary arts event, which is held every three years. With Kitagawa Fram acting as the curator, this art festival was sponsored by the Fukutake Corporation in 2013 by gathering local resources and creating the closed Fukuda Elementary School into Fukutake House and inviting many artists from Taiwan, Hong Kong, Thailand, Singapore, Indonesia, Korea, and Australia to give an exhibition themed with “How will Asia face globalization”. Many artworks demonstrated the everyday life in the Shodoshima Island, and revealed the predicament faced by the country of each artist. Take Yang Wei-lin’s “Ocean of Cloth Wheels” (photo 19) as example. Yang borrowed the blue dye skills to dye thousands of cloth wheels before hanging them in the space of the abandoned school. “Cloth wheels are tools for grinding, which fret away to polish all the furniture. Yet the industry of cloth wheels has seen a decline in the last decades under the impact of the globalization. The Shodoshima Island was famous for stone exportation and is now replaced by cheap stone materials form China. Today it is used for tombstones only.”¹⁷

This arts festival is not merely intended for display art; rather, it aims to attract foreigners (including

tourists and artists) to the island to appreciate art and the environment and history that breeds and contains all types of art. Meanwhile, by interacting with the local people, this festival endeavors to help this most forgotten small island achieve sustainability. Hence it can be said that art is the exterior package. Its spirit lies in vitalizing the local culture and prosperity.

Table 7 An Introduction to Fukutake House

Current Name	Fukutake House (The Setouchi International Art Festival 2013)
Operating Unit	Fukutake Group, Shodoshima-cho, Fukuda Union
Previous Name	Shodoshima Island Fukuda Elementary School
History	<p>Founded in 1873</p> <p>In 1947, the new-system Fukuda Elementary School was established.</p> <p>In 2009, the school was closed.</p> <p>In 2013, the Setouchi International Art Festival was conducted in here.</p>
Presently Used as	Exhibition space for contemporary art



Photo 19 Taiwanese Artist Yang Weilin's "Ocean of Cloth Wheels" Source: News&Market (photo by Lin Hui-cheng)

V Analyzing Cases

1 Process of Decision Making

From the statistics and cases in both countries, low fertility rate first affects primary schools, which are community-based and have a strong connection to community people. In the process of turning the silent school into arts space, regular people's participation plays a pivotal role. Such residents provide valuable opinions that only the locals can have and partake in the maintenance and operations after transformation, as they all have deep emotions for the space. The Japanese government has encouraged the public's participation by holding public hearings, official documentations, text messaging and so forth and recruiting the

professionals' help. Some cases were finalized by local residents, as they voiced their needs, proposed a plan, provided a vision, and even raised funds to direct the reuse of the once abandoned spaces. This is a bottom-up approach.

In contrast to the MEXT, a government agency that takes charge of educational and cultural affairs at the same time, Taiwan's responsible agencies are the Ministry of Education and the Ministry of Culture, both of which have rarely taken proactive actions in interactions and formulating guidelines for local governments. For want of the guidelines and resources, the local governments could only maintain the hardware and facilities. Longtime operations or creative marketing are beyond their capabilities and resources.

Jürgen Habermas regarded the public space a congregation of private persons, and through the creation of metatopical space, the public is ultimately created. As a more mature civil society, the Japanese is familiar with expressing personal views through public channels while the government is well able to appreciate the importance of the public's opinions. Artists and art administrators alike have partaken in community's arts spaces and put forward best effort to make closed campus a vital resource for sustainability. The Taiwanese counterparts, however, seem to lack an awareness of public opinions, when the Taiwanese either act politically, violently, or detachedly. For instance, many people still hold a spectator's attitude when observing a public artwork, without showing responsibility or obligation that a civilian should have.¹⁸

2 Choosing Arts Spaces

The cases gathered in Taiwan and Japan show that both countries' people are inclined toward community art and cultural center, where consumption, leisurely activities, experience events coexist, inviting visitors to appreciate the flavors of art through eyes, ears and tastes. This means that both countries' people prefer a more friendly art style and welcome the flexibility of multi-functions space. This is an individualistic choice of life style, from which emerges the social context of that area or community.

For the art workers, this is "post-alternative space". As Yao Jui-chung asserted, "As the resources of art industry begins to tighten, the alternative space has started to adopt a more

flexible operating method that cares for survival and ideals." "Post-alternative spaces' are built around experimentalism, independence, autonomy, academics and mobility and centered on artists themselves; in other words, they know of the market trends yet stand firm; they have ideals yet do not purposely voice dissents; they have origins from academic world yet do not look pedantic. They may sometimes reach a compromise for the sake of the audience, yet they will never make flattering gestures." ¹⁹

IV Conclusions

The transformation of closed schools into other spaces is not merely a change in urban planning, or a renovation wrought by architects and construction companies. It symbolizes a change of the societal and population structures, which involves with the collective memory and emotions of the public. Under the interaction and negotiation among stakeholders, the identity and content of the school's space changes, so does its destiny. Therefore when art becomes the new container of old structures, the consensus, expectation and anticipation of the community shall all be respected. Hence the instilment of art into communities motivates a local art market, where everybody can appreciate art while enjoying shopping and leisurely activities provided by local industries. That's why art has become an indispensable means to keep an area sustainable.

In observation of the gradually declining fertility rate in Taiwan, school closing will be a trend in the years to come. If the number of closed schools sees

an increase, then art spaces will very likely increase as well. Localization and the execution of art in daily life will be the future trend in developing art in communities, coupled with the needs demanded by an aging society.

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學術論文發表

藝術品網路交易平台 亞洲華語市場與西方市場初探分析

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摘要

隨著消費形態的改變，與近年來藝術品網路交易平台數量的大幅成長，藝術網路市場的議題，又再度受到關注。相較於西方藝術品網路交易平台的發展，亞洲市場相對來說，仍處於起步發展的階段。近年來，藝術品網路交易的模式，有了不同形態的趨勢發展，且其成效也相當受到矚目。本文章擬討論西方與亞洲華語地區的藝術品交易平台的發展現況，期望藉由分析比較各平台間的交易，瞭解當前藝術品網路交易的趨勢與發展，並分析不同平台的操作模式與策略。

本文擬分為兩部分，第一部分將先定義藝術品網路消費的特性，借鑒消費理論，釐清藝術品作為交易對象的特質。接續討論電子商務的發展特質，以及藝術品網路平台可能的限制。第二部分則探討現今在西方與亞洲華語市場中，藝術品網路交易平台的類型與操作模式，其形式上大致可分為：單純電子商務平台、提供整合性藝術服務的線上平台、博覽會形式與策展觀念呈現、實體通路與電子商務並進等四種類型。分析討論這些交易平台各自的定位，其背後現象以及成效，並提出在此市場趨勢下，討論藝術品網路平台的優勢及劣勢。最後，針對亞洲藝術品網路市場，立基於個案討論與研究報告，本文認為「建立明確的品牌形象」、「專業整合的複合型藝術服務」、「發展亞洲市場特色」，將會成為亞洲華語市場在發展藝術品網路平台，累積區域市場資源實力的關鍵。

關鍵字：藝術品網路交易平台、亞洲網路藝術市場

前言

隨著現代消費形態的改變，與近年來藝術品網路交易平台的成長，藝術市場與網路的關係一直以來都具有討論的爭議，過去在 2000 年前後，許多拍賣公司與畫廊，都曾嘗試和網路結合，但在當時經濟環境與藝術品網路消費習慣尚未成熟的情形下，除了少數案例，如蘇富比於 2000 年在網站上以 800 萬美元賣出了《獨立宣言》印刷首版，多數的交易平台，其成效似乎不盡理想。依據英國藝術保險公司 Hiscox 與藝術市場研究機構 Arttactic，在 2013 年針對全球藝術品網路交易所發表的報告顯示，當前全球的藝術品網路交易，約為 8.7 億美金，雖然僅佔藝術市場的 1.6%，但其預估，在未來至 2017 年的五年內，可望有 19% 的成長率，達到 21 億的產值 (Hiscox & ArtTactic, 2013)。隨著藝術品在網路交易的數量和總交易價格正逐年增加，藝術品線上交易的接受度越來越高，國際性平台如佳士得在 2013 年 2 月所推出的網路拍賣「安迪沃荷與佳士得」專場，在亞洲市場，如 2013 年成立的「Artshare」，專營亞洲現代及當代藝術品的線上展覽與交易平台、中國拍賣公司推出的「嘉德線上」，台灣的「帝圖科技文化¹」等，顯見各類型的藝術品交易平台的成長趨勢。然而，藝術品網路交易，仍存在著有待觀察的現象，包括辨別作品質地、真偽的機制，高單價的藝術作品是否適合，以及交易的配套措施如匯款與運輸等，都是藝術品網路交易平台一直以來的爭議。綜合上述討論，本文擬討論西方市場與亞洲華語地區的藝術品交易平台發展現況，期望藉由分析比較各平台間的交易，瞭解藝術品交易的趨勢與發展。

藝術品文化消費

藝術品本身具有兩種特性，分別為裝飾性（decorativeness）與知性訴求（intellectual appeal），前者為藝術品的外在的物件特質，包含尺寸、媒材、主題等，後者指涉藝術品的品質、歷史意義、藝術家名聲等隱性內涵（Singer, 1978）。在後現代消費主義之後，藝術品從鑑賞到消費，步入了文化消費中商品化的一環，如同布西亞（Jean Baudrillard）所言，消費的本質不再是產品本身，而是其所代表的符號。消費者在消費的過程之中，因對其產生認同，形成了對於自我的定位，該消費選擇體現了消費者的品味，而當不同差異性存在時，便成為一種具有區隔他我的品味消費，某種程度上回應了社會階級的區分（林志明譯，1997）。相較於一般商品，由於藝術品的獨特性與原創性，彰顯了其真實價值（authenticity value）的特質，而此種可驗證的真實，是藝術品所含文化價值的根本（Throsby, 2001），也使得藝術品蘊含有文化符碼，且具有不可取代性與稀有性。Simona Botti (2000) 分別從文化功能需求（Functional/Cultural Needs）、象徵需求（Symbolic Needs）與社會需求（Social Needs）三個層面來探討藝術消費的特性，對於消費者而言，透過藝術消費，滿足其對於知識追求的文化功能需求；象徵需求則是體現了消費者個人的特質或是其所屬的文化，以及其所象徵的社會地位（Bourdieu, 1984; Lury, 1996）；而社會需求意指藝術類商品與社交功能的連結，作為聚集人群和打開與他人社交談話的一種方式，滿足了消費者對於社交的需要。對於藝術消費者而言，其內在的符號價值，不僅象徵著對文化資本的擁有與品味地展現，消費者也同

時在此價值意義的建構過程當中，獲得體驗與慾望的滿足，這種炫耀式消費（Conspicuous Consumption）的體現，區分了藝術消費與一般商品本質上的差異。

在藝術市場之中，消費者購買藝術品的動機，是極具個人主義的，並倚賴於消費者過去的消費經驗。James HeilBrun 與 Charlese M. Gray (2004) 認為，消費者對於藝術品的需求，大致上可概分為受財富（Wealth）、藝術品的流動性（Liquidity）、風險（Risk）、預期回報（Expected Return）、品味與偏好（Tastes and Preference）等影響，前三項以經濟的角度來衡量，把藝術品視為一種資產，其感知價值大於強調功能性的必需商品，因此能夠購買藝術品的彈性，與財富具有密切的呼應關係，而藝術品較低流動性與較高風險，則是反應了藝術品在市場上的高度不確定性與變動性特質；後兩項則是從消費者的個人體驗來衡量，預期回報雖可以根據對市場的瞭解來做出相對應的客觀計算，但其中作品所帶給消費者的美學愉悅，也是影響消費者意願的關鍵，消費者的品味與偏好則是建立在過去與藝術接觸或消費的經驗。而 Olav Velthuis (2011) 則從出於對藝術品喜愛的動機、金融動機與社交動機三個層面來討論。上述兩個學者，基本上所探討的概念是相似的，皆以經濟的考量，藝術品消費的社會象徵意義，以及個人感觀體驗與感性訴求出發。再者，在藝術消費的過程中，消費者並不是被動地接收，與內化市場上所創制出的符號意義，而是基於自己的理解建構，積極主動地，參與到對藝術品符號意義的建構之中，因此，消費者內在個人性的主觀經驗，以及過去與藝術接觸的經驗，會相互影響，使得藝術消費，具有所謂預期先驗（prior

expectation) 的特性 (Throsby, 2001:116), 通常在主宰著消費者的決定動機上, 佔有重要性的影響。綜合上述討論, 藝術消費者的習慣, 以及對資訊的需求, 是藝術消費者在決策時的重要面向, 而電子商務的特性, 與此兩者的關聯性, 將在後文做進一步的討論。

電子商務的發展

隨著網際網路的開放與普及, 近幾十年, 電子商務獲得了長足的發展空間, 根據 2012 年, 數位時代雜誌所做的評比—「台灣網站 100 強」², 在十大類型的網站分佈中, 電子商務類以 15 家, 從 2011 年的第四名竄升至亞軍³。從基本定義來探討, 電子商務是指買賣雙方透過網絡來從事商品及服務的交換買賣活動, 將傳統商業活動中的各個環節電子化與網路化, 無論是以實體或是數位化的格式, 在兩地之間, 以電子訊號為傳播媒介, 是為一種新型態的商業模式 (Greenstein & Feinman, 2000)。從買賣雙方與服務品質的角度來剖析, Kalakota&Whinston (1996) 認為, 電子商務的特性在於, 其藉由電腦網路, 能將購買與銷售、產品與服務等商業活動同時結合, 同時滿足組織與消費者的需要, 進而改善產品、服務, 以及提高傳遞速度服務的品質, 達成降低成本的要求。而盧希鵬 (2005) 也提出了相似的概念, 認為藉由網路形態的商務交易, 能夠提供多方的價值, 結合網路科技、商務流程與經濟價值所構成的聯結, 為電子商務的三項精神。而隨著科技進步, 電子商務的媒介也越來越多元化, 包含電腦、手機、可上網的行動載具等, 將服務、商品等完整訊息傳遞到交易另一方 (陳宏欣, 2010)。此種透過網路載體來進行消費服務資訊的傳遞, 使交易雙方可以不受時空的限制而完成交易。

如上述所論, 電子商務所應用的範圍很廣, 眾多的研究針對不同的網站類型、使用介面、經營模式等做討論⁴, 電子商務並非把訊息全部丟到網路上就會成功製造點擊率, 正因為處於網路資訊爆炸的時代, 正確的經營決策, 才能獲得消費者的關注, 進而產生對品牌的忠誠度。Amit & Zott (2001) 提出, 電子商務的優勢在於公開性、廣泛性、交互性、低成本、高速度與高效率等特點。而對於不同的使用者又會有不同的優勢, Garicano & Kaplan (2000) 認為企業應用電子商務可獲得製程或流程的改善, 以及在市場利益創造上 (降低搜尋成本、提供更多產品資訊、提供買賣雙方更多資訊) 等產生的效率達到降低成本的效益, 電子商務可大幅減少交易原先需進行的營運流程及活動等。陳宏欣 (2010) 整理眾多學者研究發現電子商務的價值在於降低商業流程的繁瑣程度, 及降低買賣雙方的搜尋成本, 並利用資訊技術及工具, 將交易流程縮短或減少, 提供更多價值。此電子商務最大的價值是概及程等創新。

利弊相隨, 電子商務同樣也有所限制, 劉文良 (2009) 提及電子商務需要有公共政策與技術標準兩大支柱來支撐。公共政策中包括了使用權、隱私權、資訊定價等管理問題; 而技術標準方面, 需要有文件安全性、網路協定、網路傳輸方式等管理問題。擁有上述兩者才能夠讓電子商務順利運行, 簡言之, 如果兩範圍內有不健全的部分, 便會衍伸出眾多電子商務的狀況。除此之外, 劉文良 (2009) 認為電子商務發展障礙有五點, 分別為: 1. 創意與經營模式易被複製。2. 網站建構、維護、廣告行銷、顧客服務成本高。3. 缺乏後端整合能力。4. 長期獲利率遞減。5. 網

路使用習慣需再教育。筆者認為，公共政策與技術標準是日後發展關鍵，政府是否支持發展並定訂規範與技術是否能夠跟上經營者和使用者的需求都是重要的課題。就上述的發展障礙，筆者對於上述劉文良（2009）提出的廣告行銷服務成本高與長期獲利率遞減，是否適用於藝術品網路交易保持待商榷的態度，而其餘三點，的確是藝術品網路平台，在發展時所待解決的部分。

藝術市場跨足電子商務？

在藝術市場的網絡當中，由供給雙方以藝術品，包含了畫作，雕塑，古董文物等，來進行的交換商業活動所構成，參與供給雙方的角色，可能有藏家、藝術組織、藝術家後代等各種有興趣的消費族群，拍賣行、畫廊、藝術顧問則是作為媒合供給需求的角色（Velthuis, 2011:33）。在藝術市場之中，無可避免地，藝術品的商業價值，是以金錢來作衡量，而所謂藝術市場的中介者，畫廊業者或是私人畫商，則掌握著藝術市場的運作（孫玟玲譯，2010）。然而，無論是在一級市場或是二級市場，藝術品的價格，除了受到作品大小、媒材與作品狀況等與藝術品本身有直接相關的條件所影響，藝術家的名氣、該件作品所使用的繪畫技巧，以及作品的真確性，都是影響藝術品價格的關鍵，除此之外，上述的影響條件，也可能會因地域與時間的因素而產生消長變化（Sagot-Duvaurox, 2011）。由於藝術品的價格具有高度的變動性，使得購買藝術品的成本，也難以被客觀地估算，一般而言，包含有交易成本（transaction cost）與資訊成本（information cost）的支出（HeilBrun & Gray,

2004）。在前述在討論藝術品消費的特性時曾提及，藝術品消費者，在選擇動機時，倚賴於前文所討論預期先驗的概念、消費習慣，以及消費者對於資訊的需求，而藝術作品的真確性，使其具有不可取代的價值，而綜合上述所討論，電子商務的優勢，在於能夠提供高效率的、開放的、交互性等特質，其是否適用於藝術品消費，以下將分為觀看藝術品的在場性、藝術消費者的習慣性、藝術市場的隱匿性等三個面向，分點敘述討論之。

1. 觀看藝術品的在場性

藝術透過眾多技巧、媒材去探討心靈層面、社會現象等議題來做呈現，當人親自面對作品時，才能夠體會到藝術品的「靈光」（aura）。這概念強調了「在場性」，強烈的複雜情感是與藝術品實際面對面時所觸發的，因此「面對作品的形式」便是藝術品發展電子商務中目前最重要的問題。一般的電子商務，商品大部分都是非唯一性和大量複製的作品，於現今品管標準一致的消費市場中，一般商品無須面對面便可以決定是否購買。正也因為如此，目前大部分的藝術品線上交易都是以攝影、版畫等複製的作品為主。若所銷售作品為具有不可複製性的創作，則該平台應思考如何確保作品真確性，以及解決作品視覺呈現等問題。

2. 藝術消費者的習慣性

受上述原因影響，以及藝術品真偽問題，藝術消費目前還是以傳統的銷售方式為大宗。藝術品的紋理、色調等因素不但影響觀看也事關真偽的判斷依據，而當藝術品的價格較高時，消費者單憑線上資訊很難安心購買，因此現場消費的信心指數是高於線上交易

的，因此近年眾多藝術品進軍電子商務，也多從低單價以及當代藝術（真偽問題較容易判別）來做切入。但該如何培養藝術消費者於電子商務的使用習慣，採取相應的策略，仍有待觀察。

3. 藝術市場的隱匿性

藝術市場的資訊，時常是緩慢流通或是不透明化的，正也因為如此，許多實際情形，並非如同台面上所看到，對於銷售者而言，如何掌握重要的市場資訊，並提供有價值的資訊給收藏家，也是藝術市場生態之中，所受到重視的個人專業。而電子商務是否能夠提升藝術市場的透明度，還是反而使之更隱匿，其是否能被消費者所信賴，取決於所採取的策略。

綜合上述所論，電子商務本身已具有當前可能的發展限制，像是經營模式容易被複製、網路習慣需再建立等既有問題，而藝術市場跨足電子商務時，又因為藝術品本身的特性，而產生其不同一般性商品的問題，如何透過兩者的特色去消弭或降低問題風險，讓消費者能夠更認識藝術市場，以及獲得其所期望的服務，便是跨足電子商務的發展重點所在。

藝術品網路交易平台的發展與現況

2013年8月，電子商務龍頭亞馬遜（Amazon）正式推出了亞馬遜藝術（AmazonArt），共與150家藝廊合作，集合了4500位藝術家約4萬多件作品，其中不乏達米恩·赫斯特（Damien Hirst）、安迪沃荷（Andy Warhol）等明星藝術家，而價位有從新秀藝術家亨佛萊（Ryan Humphrey）10美元的網版印刷，到

洛克威爾（Norman Rockwell）485萬美元的高價畫作，不過大部分還是集中在500到5000美元的區間，在定位上目標客群放在藝術品消費者，而非專業收藏家。事實上，這並非亞馬遜第一次挑戰藝術品電子商務，早在1999年左右，其就曾與蘇富比（Sotheby's）共同合作在網站上銷售藝術品，成為當時首家在網際網路舉辦拍賣會的國際級拍賣商，推出的線上拍賣其中以美國獨立宣言的印刷首版最受注目，不負眾望以800萬美元高價成交，成為早期國外零星的成功案例之一。之後蘇富比也陸續跟eBay合作過，為當時的藝術品交易開啟另一扇大門，然而在2003年，出於虧損的緣故，蘇富比停止了藝術品網路交易的相關業務。而2004年時，Artnet也曾推出網上競拍的業務，最終也因虧損而退出。而在台灣，約於1997年，台北國際藝術博覽會曾與科技公司合作策畫「網路藝術博覽會」，與此同時，敦煌藝術中心與龍門畫廊也曾開設過網路畫廊的業務，後來因為帶來相符合的商機，而陸續歇業（石隆盛，2012；藝術銀行雜誌，2012）。雖然藝術品與電子商務的結合，曾短暫出現一線曙光，但隨著網路泡沫化以及金融海嘯的全球情勢下，藝術品和電子商務的組合，時機看似尚未成熟，國內外情況皆然，不僅沒有培養出此類消費者，連同業們也沒共鳴，發展始終不如預期，之後便陸續黯然退出電子商務的市場。

直到近年來眾多品牌，又紛紛投入藝術品電子商務，例如前述的佳士得與亞馬遜藝術，Artnet與蘇富比也分別於2008及2010年，重新開辦藝術品的網路拍賣業務；而亞洲市場雖然起步較緩，例如日本的@Gallery Tagboat於2003年成立，台灣有2010年

正式上線的飛馳中藝術拍賣網，在中國內地，2000年之初，趙涌在線與嘉德線上的成立，到2010年左右，主打藝術品，隨著越來越多藝術品網路交易平台的出現，藝術品網路交易平台的發展性，又再度引起討論。在此一捲土重來的浪潮中，是大環境重新開啟了這條康莊大道？還是經營者在策略做出改變？都有待繼續觀察。然而，Skate's [2012] 在2011年藝術市場報告便大膽宣言，藝術產業發展前景的關鍵，在於加入電子商務發展的趨勢。若以熟悉的陌生人來比喻電子商務與藝術市場之間的關係，兩者之間要重修舊好，仍待時間的考驗。如同2012年skate's的藝術市場報告中認為，藝術品線上交易在藝術產業中急速成長，在各種商業模式中有許多創投跟合作開發的加入，但藝術品線上交易還在一個非常年輕和學習的階段，目前為止都還沒有一個成功的模式。當前的藝術產業中，與電子商務結合的網路平台，皆採取各種不

同的模式和策略，其各自的定位與期待也不同，待在下文中作後續討論。

先就整體產業環境而言，根據Skate's [2012] 藝術市場報告中所作的統計，在2011年，由藝術產業與電子商務結合的藝術品網路交易平台，在全球網路流量部分，領先者eBay為第20名，而其餘在前五名之內的平台，包含Liveauctioneers、Artnet、Christie's、Heritage Auction，其流量皆介於一萬名之後，其餘的平台，更是在兩萬名之後。到了2012年，eBay雖成長上升為18名，緊接在後的Getty Images為第3505名，但是前述的Liveauctioneer、Artnet、Christie's等，排名卻是不升反退（詳見表1）。由此可觀之，當前藝術品網路交易平台，仍舊處於不穩定的狀態，相對為較少人關注的領域，其成長空間，仍有待發展。

表 1 藝術品網路交易平台：全球網路流量排名

2011 排名	全球網路流量排名 (名次)	2012 排名	全球網路流量排名 (名次)
1. eBay	20	1. eBay	18
2. Liveauctioneers	10,133	2. Getty Images	3,505
3. Artnet	11,152	3. Liveauctioneers	10,486
4. Christie's	11,771	4. Christie's	19,509
5. Heritage Auction	19,436	5. Artnet	18,509

本研究整理 (資料來源：Skate's, 2012; Skate's, 2013)。

然而，與當時在 2000 年左右，各類平台初始發展時的網路使用情形相比，當前的行動上網，已經脫離費率昂貴以及速度緩慢的情形，行動上網與智慧型手機逐漸普及，越來越多的行動載具與應用軟體出現，改變了人們行動上網的習慣，換言之，人們對於網路的使用習慣與依賴度，已逐漸在攀升。據 Hiscox & ArtTactic (2013) 的藝術品網路交易研究報告指出，藝術消費者對於僅依據電子圖檔來購買藝術品，正逐漸產生消費信心，在其研究樣本中，64% 的收藏家曾有直接在網路平台購買藝術品的經驗（而非另外透過管道與畫商有直接互動），而 71% 的收藏家，曾有僅依據數位電子圖檔，就決定要購買藝術品的消費經驗⁵，險見藝術品消費者的網路消費習慣，正朝著逐漸穩固的趨勢發展。再者，縱觀藝術產業的金字塔，以藝術作品所具有的投資與收藏功能而論，被認為有潛力增值的較高單價藝術品已有固定藏家群，或是所謂藝術投資者們的鞏固。對於中低價位的藝術作品，其市場或多或少會受到排擠效應的影響，因此極需另闢戰場，而藝術品網路交易平台，似乎便提供了另一個管道。

縱然線上交易的確帶有值得探索的潛力，但根據 Skate's 2012 年的調查，目前藝術產業中，主要的核心經營模式還是以實體為主，大約有 65% 的公司並無把主軸業務轉移至線上。就整體藝術市場產業的現況而言，實體經營佔 70% 為大宗，15% 為線上網路交易平台，而跨足實體經營與線上交易平台的經營者占 15%。由數據可看出，線上的成長度還有很大的成長空間，從另一角度而論，越早對此潛力趨勢做出反應的經營者，便有機會占有該產業的先進者優勢。

藝術品網路交易平台：策略模式分析

誠如上述所論，到目前為止，藝術品網路交易平台，仍舊在發展中，尚未出現一非常具代表性的模式。在後續的篇幅討論中，本文依據其經營模式的差異，大致歸納出四種類型，分別為：單純電子商務平台、提供整合性藝術服務的線上平台、博覽會形式與策展觀念呈現、實體通路與電子商務並進。以下將就各模式的優缺點，來分析其定位與策略。

1. 單純電子商務平台

目前單純以電子商務來操作的平台有 eBay、淘寶網、奇摩、樂天。類型的經營方式，如同奇摩的「什麼都賣，什麼都不奇怪」概念，任何類型的商品都可以在這找到，當然藝術品也是其中之一。豐富多元的商品種類驅使消費者來此收尋各自的需求，讓此類型的瀏覽量始終居高不下，成為最大的優勢，正所謂：人潮就是錢潮。

以藝術拍賣流量最大的 eBay 為例，eBay 有 38 項商品分類，「藝術與收藏」這項是 eBay 所有領域中第四重要的，僅次於時尚、汽車、電子領域。Skate's (2012) 在 2011 年的研究報告指出，eBay 所擁有的龐大資金以及市場，比整個藝術市場大上許多，藝術品交易在 eBay 是最適合不過了。但其也指出兩點 eBay 需持續再改善的障礙，分別為安全問題和不法行為的情況。事實上，這也正是大部分藝術品與電子商務結合時，所面臨的隱憂。除此之外，eBay 無法把線上交易與實體做結合，對於部分消費者而言，其與藝術作品的實體接觸需求無法被滿足，網站所能呈現的視覺

吸引，並無法構成其消費的衝動。再者，eBay 並無以策展概念，以及匯聚藝術市場資料的策略，來支持消費者購買和銷售的決定，而是僅以照片來推砌，導致其視覺呈現，更類似於跳蚤市場而非藝術市場的性質，這也是採用此模式的經營者，普遍回受到質疑挑戰的課題。

然而，eBay 雖身為全球數一數二的電子商務交易平台，然而以其亞太地區市場佔有率而論，實際上並不理想。eBay 當初在日本與台灣發展不順的原因，可歸因於先喪失先競者優勢，爾後又因為對當地市場情勢了解不足，與許多的措施，位以落實本土化為考量，使得消費者流失的更快，因此在亞太地區的市場，便為淘寶網、奇摩、樂天所占據（張凱鈞，2010）。

2. 提供整合性藝術服務的線上平台

此一類型的平台數量越來越多，藝術服務包括了資訊提供、數據分析、教育服務，以及中介的整合，透過這些服務，讓平台更具有友善性，使更多人可以踏入甚至了解藝術產業。Deloitte& ArtTactic(2013)的報告顯示，無論是藝術專業人才或是收藏家皆認為，「資訊提供以及教育」功能，在藝術品的電子商務經營模式之中，是其最為重視的。而此類的平台比例也占最多，包括有今年 8 月剛成立的 AmazonArt，有一定市場研究經驗與聲望的 Artprice、Artnet、Artsy、Artfacts.net，以及亞洲的 @Gallery Tagboat、Hihey.com 和雅昌藝術網等。其各自雖具有不同的特色，但主要還是以「藝術產業的資訊流通」間的緊密聯結作為利基。AmazonArt 較特別的是今年由 Amazon 成立，與原本單純電子商務平台的 Amazon 經營模式不同，不單單只提供平台，也與畫廊、博覽會合作（如

affordable art fair）合作，試圖利用不同的模式來服務消費者。

Artprice、Artnet 以及雅昌藝術網，擁有自身的藝術品拍賣價格資料庫，系統化的整理，企圖讓藝術品價格透明化，並依據市場趨勢與拍賣結果做出分析，可提供消費者作為參考依據，希望能夠解決傳統藝術市場的隱匿性，以降低消費者的資訊成本，來吸引消費者。1989 年成立的 Artnet.com，是世界第一個價格數據庫與網絡交易平台。在 2008 年，Artnet 開始運營線上拍賣業務，至 2012 年，全年交易量達 1500 萬美元，拍品平均成交價較前一年上升 1 萬美元。最近，他們新推出“Purchase Now”功能，買家可以立即下單購買藝術品，如同一般網購中的「立即購買」模式，試圖加速整個交易過程。

Artprice 為藝術品價格和數據庫的領導者，隨時的更新各地 4500 家國家拍賣行的資訊，數據庫中擁有 50 多萬名藝術家的 2700 多萬個指數和拍賣結果，並經常對新聞機構及 6,300 家國際平面媒體發佈藝術市場趨勢。2012 年 9 月，其宣布把數據庫資料以及其藝術市場標準化逐漸轉移到免費軟體中，提供大學、博物館、基金會、圖書館以及與藝術交易相關的機構，像是海關、保險公司等機構，讓藝術市場能夠標準化，企圖打造一個讓產業端以及消費端，對於藝術品價格的掌握，都能更加透明化的環境。

在亞洲市場方面，雅昌藝術網 2000 年成立，是目前中國最知名的藝術網，每日瀏覽量有八百萬以上的人次，高端會員有一百萬以上，擁有資料庫、藝術家資訊、拍賣以及和博物館等專業機構聯盟，設有「A

計畫」，意旨加入會員便可於畫廊、藝文餐廳、商店等等有折扣。除此之外，針對國際性市場，雅昌藝術網期望能夠達成納入世界各地知名拍賣紀錄的資料庫，而針對亞洲市場，則聚焦於加強亞洲市場拍賣紀錄，以及數據的完善與可靠性，試圖以提供具有東方視角的特色分析，與現有的平台，做出區隔。

而 Artsy、HIHEY.com 和 @Gallery Tagboat，則是資源共享及中介整合的平台，來作為策略，Artsy 擁有「藝術基因資料庫」，可以依照地區、風格、技術、主題、當代藝術等，做出藝術品分類，有趣的是，可以依照作品的色系來分類，十足展現 Artsy 這個名字的意涵。在網站使用的界面尚，其把藝術介紹文章與社群平台 Facebook 和 Twitter 連結，試圖了解消費者的消費行為。在購買藝術品的功能方面，消費者並無法立即出價競標，需透過查詢功能之後，再以 Email 與經營者聯絡，才能有更進一步的消費，試圖提高整體交易過程的謹慎度。在 2013 年，其版圖甚至擴張到與惠特尼博物館合作舉辦線上拍賣，提升自己的專業。而 2011 年成立於中國的 HIHEY.com，總部位於北京 798，提供藝術家、畫廊、拍賣行、金融機構等交易平台，各個角色都可以利用此平台來為自己行銷以及定價。線上拍賣拍品主要以當代藝術為主，拍品包括油畫、陶瓷、攝影多媒體以及裝置藝術，HIHEY.com 上的作品大都具有較強的裝飾性，而起標價甚至有出現 0 元的作品，大部分的價格也都展現親民的一面，目前平均日交易額已達到了 20 萬人民幣。

此類型的資訊提供者，在整體藝術市場中，佔有重要性角色，無論新舊藏家，對於精準的資訊需求，都

具有高度的吸引力誘因。因此，此類型的經營者，也逐漸多開始與博物館、學術單位合作，以提升其數據與市場資訊的公信力。中介的角色也會受到更多的矚目，讓藝術市場產業鏈中的參與者，能藉由平台提升其效益。再者，此類型平台上的藝術品，多採中低價策略，試圖營造日常生活美學的消費氛圍。

3. 博覽會形式以及策展觀念呈現

近年來，藝術品網路交易平台的形式，企圖突破以往被限制的框架，希望把實體博覽會或是展覽的概念納入，此時 VIP Art Fair 與 Artshare 便應運而生，希望能夠在電子商務中，呈現給使用者仿若實際看到作品的經驗，藉由科技，模擬實體展示的方式，轉移至虛擬線上。

2011 年，首屆網路藝術博覽會 VIP Art Fair 展開，聚集包括 Gagosian Gallery、White Cube 等來自全世界 30 個國家，共有 138 家畫廊。VIP Art Fair 的線上藝術博覽會，以創新的形式，提供一個平台給畫廊和藏家，因此該平台並無運輸、保險、以及交易安全等業務問題。透過「即時通訊」的服務，讓有興趣的參觀者可以馬上和參展者討論，以及請來許多知名策展人，設立個人的導覽路線，期望透過新形態的藝術服務，發揮線上所具有的即時性與開放性特色，讓線上博覽會進行更順暢。然而，首屆的 VIP Art fair，仍因技術因素，出現了網路塞車，以及受困於網站設計，而產生瀏覽方式不具便利性的問題，此外，大多數成交作品還是以歐美市場中的知名藝術家為主（黃亞紀，2010）。2012 年時，VIP Art Fair 便加強改善技術問題，發展專為該博覽會設計的 VIP 2.0 技術，運

用雲端科技，支援行動裝置和增加與社群媒體的連結，像是 Facebook、Twitter 等，讓使用者能更為便利的參觀博覽會。到了 2013 年，由 Artspace 併購 VIP，期待創造出不同的形式，以提升其競爭優勢。除了 Artspace 看好此類平台發展的趨勢，Artsy 也擴增其版圖規模，納入線上博覽會的平台形態，與眾多博物館合作也之外，也與巴塞爾設計博覽會 (Design Miami Basel)、著名的軍火庫藝術博覽會 (The Armory show)，進行線上合作，把許多參展畫廊欲帶去的作品，提供有高解析圖片的展示，以及作品分類等服務，增強其使用者功能的便利程度，以上這些結盟，使該網站平台的具有使用戶量提升的優勢。

反觀亞洲市場，以呈現策展觀念的經營者模式，以 2013 年正式開始營運的 Artshare 最受到矚目。打著全球首個專營亞洲現代及當代藝術品的網上展覽及交易平台的稱號，該平台特別強調其三點優勢，包括擁擁有資深策展團隊、積極主動及多元化的藝術採購策略，以及線上與實體的雙重體驗。結合科技技術，以最新的 3D 技術舉辦網上展覽，提供多角度且多元的藝術品觀賞體驗，希望能夠突破線上觀看作品的失真限制。此外，該平台也以策展團隊的方式，舉辦線上展覽，並固定於每月推出一檔展覽，大約十件精品，價格約從一萬美元起。消費者若有喜歡的作品，更可以要求實地察看，結合線上與實體的通路，Artshare 的確跳脫出過去既有的平台模式，期以提供消費者，兼具博物館般的專業以及審美價值的體驗。

就傳統中的博覽會，該場域所提供的社交功能，一直是傳統藝術市場中，作為資訊交換管道的重要特質，對藝術品的銷售者而言，可以藉此機會，向藏

家介紹其代理的藝術家和作品，甚至是向藏家提供建議；而對消費者來說，參與該藝術場合，可以滿足藝術消費中，其社交需求的特性，可以遇到藝術圈中的不同人物，並互相交換彼此的想法，且能同時感受作品現場氛圍的感染。此類特性的缺乏，該如何藉由網路的優勢來克服，或走出創新且能回應產業需求的新商業模式，便成為此類，以網路博覽會與展覽策展為主體的經營者，當前所面臨的挑戰。

4. 實體通路與電子商務並進

此類型的模式有 Sotheby's、Christie's、Saatchionline、Heritage Auction、嘉德、趙湧在線、飛馳中藝術拍賣網等，這些都是由實體拍賣公司或是畫廊與電子商務作結合，期待能夠開啟不同的市場，服務、培養不同的消費群眾。以 Heritage Auction 為例，網站上便說明他們任務是成為藝術市場中最受信賴以及最有效率的公司。而此類型經營的優勢就是既有品牌所累積的全球知名度、形象、專業以及顧客。正因如此，才能擁有消費者的高信賴度，目前最高的成交金額紀錄也出現於此類型。

Christie's 於 2013 年 2 月的「安迪沃荷與佳士得」線上專拍，宣稱獲得 36 個國家的新舊藏家達成交易，總成交額達到預期的兩倍，接近 230 萬美金，成交率高達 99%。今年又再度以安迪沃荷作品於 4、9 月推出線上拍賣以及中國線上專拍，還有以奈良美智、村上隆、草間彌生為主的線上專拍，可以看到 Christie's 對線上專拍的重視和效益。觀其經營策略，推出的多為高知名度藝術家，且以其相對低價的版畫類作品為主，主要採取一個較為保守，以及培養新藏

家的策略來經營這塊市場。除了傳統的拍賣公司，傳統畫廊也有跨足的案例，Saatchionline 的背景是藝術市場中，是在西方市場具有指標性且有豐富市場經驗的 Saatchi 畫廊。該畫廊所推出的線上拍賣，在策略上明顯與其實體所經營的藝術家與目標客群有所差異。該平台是扮演一個發掘新進藝術家的角色，提供年輕藝術家得以讓更多人所關注，並獲得被收藏的機會，使之有機會進一步發展他的藝術家生涯。由上述兩例子可以看到，實體與線上的經營策略是相輔成成，並採取不同的策略，來接觸更廣大的消費族群，企圖突破原品牌所被限制的窠臼。

除了上述由 Christie's 今年特別開設「安迪沃荷與佳士得」的中國線上專拍，在亞洲市場，中國的趙湧在線，便是由實體拍賣泓盛拍賣老闆趙湧所創，趙湧在線則是專注於古錢幣、郵票、文獻等，不同於實體拍賣的方向。趙湧在線於 2013 年便和泓盛拍賣聯合推出線上也可以參與實體拍賣下標的服務，結合實體與線上。此外，也有例子是不同的經營流程，從線上拍賣延伸到實體拍賣，像是台灣的飛馳中藝術拍賣網。提供許多的資訊流通、中介的服務，除此之外也推出線上拍賣。帝圖科技文化藝術部總經理張馨之接受筆者的訪談時表示，帝圖線上拍賣由「飛馳中藝術拍賣網」起步，起初鎖定高端藝術品的消費族群，然而台灣線上藝術品市場尚未成熟，經過評估及執行之後調整策略，以養成消費者習慣為先，運用知名品牌的策略結盟，轉攻低單價藝術品線上拍賣市場。經過其統計，「飛馳中藝術拍賣網」的藝術品成交價格，台幣兩萬元左右的藝術品佔大宗。目前非池中藝術網於 2013 年 8 月也與中國大陸的雅昌藝術網聯盟，讓

雙方的藏家都能有更多的交流，以及達到資源共享的目的。

實體拍賣的經營成本高，因此操作利潤有限的拍品便會有風險，這時低成本的艺术品電子商務便可以利用此優勢來經營，上述的整理中便可以得知，品牌對於拍品銷售時的重要性，透過實體與線上的適當資源分配與經營策略，可以達到事半功倍的效果。此類型所擁有的優勢在於，其在實體通路的既有資源與市場經驗，且消費者對於該品牌，有一定的熟悉度。以單一成交價格而論，也比其他模式來的高。如何將品牌的信用，發揮至線上通路並提升其效益，培養消費族群在對線上高價拍品的接受度，使之能越趨普遍，為其當前可能面臨的課題。

藝術品網路交易平台的現象分析

承上述所討論，在此針對當前藝術品網路交易平台的現況，列以 SWOT 分析做一整理，並分別從藝術市場中介者（銷售端）與消費者的角度來分析，以瞭解目前的發展現況（詳見表 2）。隨著網路與科技的發展，電子商務的形態與線上消費習慣正逐漸成熟，而藝術品中介者，在跨足此領域之初，都期望能藉由電子商務本身的特性，例如公開性、效率性、互動性等，在有別藝術市場的實體通路上之外，創造出既能不受地域時空限制，又能提升與消費者的互動，接觸新的消費者族群，提高其營運效率的新商業模式。

然而，即便電子商務的消費習慣已逐漸被大眾所接受，對於藝術品中介者而言，究竟誰才是目標消費群，仍處於摸索的階段，或者我們應該問的是「誰會

表 1 藝術品網路交易平台 SWOT 分析

SWOT 分析 藝術市場中介者 / 銷售者	
<p>優勢</p> <ul style="list-style-type: none"> · 24 小時營運，買賣不受地域時空的限制 · 透過點擊數與瀏覽量精確掌握觀眾喜好 · 展示、行銷等成本降低 · 參觀門檻降低，潛在參觀族群範圍擴大 	<p>劣勢</p> <ul style="list-style-type: none"> · 藝術品靈光消逝 · 缺乏現場消費氛圍感染，銷售人員不能與藏家面對面對談 · 買家對於高單價藝術品缺乏信心 · 部分交易資訊必須透明
<p>機會</p> <ul style="list-style-type: none"> · 網路交易習慣建立 · 年輕族群對於網路較熟悉與依賴 · 與高科技逐漸結合，例如 :3D 呈現 	<p>威脅</p> <ul style="list-style-type: none"> · 駭客攻擊 · 沒有網路以及系統當機便失效
SWOT 分析 藝術消費者	
<p>優勢</p> <ul style="list-style-type: none"> · 瀏覽不受時空阻礙的即時性 · 資訊成本的降低，較易更了解市場概況 · 門檻降低，不論新舊消費族群，皆可透過搜尋功能，找到需求內容 · 隱匿性高 	<p>劣勢</p> <ul style="list-style-type: none"> · 選擇過多，難以聚焦 · 無法親眼看到藝術作品 · 對作品真偽、價格有所疑惑造成購買信心不足 · 缺乏實體參觀時，社交功能的滿足
<p>機會</p> <ul style="list-style-type: none"> · 藝術成為生活一部分 · 增加藝術品欣賞視野 	<p>威脅</p> <ul style="list-style-type: none"> · 帳號盜用、交易安全的疑慮 · 過度依賴網路資訊

於線上購買藝術品？」，而非「誰會於線上消費？」。實體通路上既有的藏家，也許並不具有於線上消費的習慣，而於線上消費的族群，對於藝術品的較高單價，出於對市場不熟悉的情況，無法確保藝術品的真確性下，則可能保持觀望的態度。顯然，對於藝術中介者而言，若採取在傳統藝術市場實體通路上的相同策略，是無法成功建立可持續發展的新商業模式。

從前文所討論的四種經營模式中可發現，藝術網路交易平台這種新型態的藝術市場中介，並不能被明確

的歸類於一級市場或二場市場，除了部份從畫廊、拍賣等從實體通路跨界的品牌，能夠較明確的區分其屬性。當前，在此類之外的藝術網路交平台，仍多以複合式藝術服務模式來經營，而非單採單一模式，作品的取得方式，也可能是從藝術家、畫廊或是藏家手中取得，或是僅提供一個平台，讓藝術品的持有者，可自行經營藝術交易。複合性的藝術服務，以提供市場資訊做結合的交易平台為例，從提供數據、分析、媒體等方式開始著手，能有較為穩定的起步，結合市場訊息，提升消費者的信心；又或如博覽會與策展的

型態，以整合畫廊資源與專家觀點，在藝術市場中，提供一個新的觀看藝術方式或消費經驗。上述新型態的藝術交易平台，試圖利用網路的即時性與便利性，嘗試整合藝術市場產業鏈中的各項資源。另一方面，在藝術品品項上，由於各家定位策略的不同，以及網路藝術市場產業的發展，仍舊處於起步的階段，哪一類型的藝術品最受到網路消費者的青睞，目前尚無一個明確的論述可依循。但整體而言，當前的藝術品品項，其單價以中低階價位的市場為主，像是平面視覺藝術，多以版畫、攝影等媒材較常見，油畫也以較為中低單價的為多，而整體又以當代藝術領域的新興藝術家為多數，除了對於消費者而言，此類品項，較無鑑定真偽的問題，價格上也較為親民。而對於仍舊處於嘗試和培養消費者階段的藝術品中介者來說，其負擔成本，也相對較低。Skate's (2012) 的研究報告指出，藝術品線上交易只會少量地影響高端藝術品，而高端藝術品其所含的投資概念，有更容易被接受的趨勢。此外，對於已擁有優勢去專注於高端藝術品的畫廊，在經營策略上，並不適合以改變其品牌在實體通路定位的方式，來交換電子商務長期的利潤，使他們失去原本在高端藝術品市場所擁有的領先地位。當前的藝術品網路交易平台，無論從經營模式與藝術品品項來看，都有別於傳統的高端藝術品市場，再者，網路平台所吸引或是期待的消費族群，與傳統藝術市場的消費族群，並不完全重疊；事實上，Hiscox & ArtTactic (2013) 指出，72% 的藝術中介者，透過其網路平台，所達成的直接交易與間接交易，是來自於新的消費族群；此外，20-40 歲間的消費族群，正持續的成長，其中，在 35-39 歲的區間，有 82% 的消費者，曾有於網路消費藝術品的經驗⁶。網路藝術中介

者，不論是在策略上，將其定位為經營者延伸性的行銷平台，藉以提供更為便利的消費經驗，或是提供新型態的藝術服務，當前整體的網路藝術市場，可以說是種仍待發展中，完全新型態的市場。

對於消費者而言，能否降低其在購買藝術品時所產生的「購買成本」與「資訊成本」是影響其消費動機的重要考量。在傳統藝術市場中，已具有相當知名度的品牌，對於其所提供的服務品質，較容易獲得消費者的信賴。而對於能提供具有公信力數據與市場資訊的平台，便相對具有吸引力。此一現象可能與藝術品消費的特質有關，由於資訊成本在藝術市場裡，一直是消費者所需關注的面向，且其所需付出的成本，也相對偏高。網路在資訊流通的開放性，某種程度上，回應了消費者對於資訊的需求，降低其可能負擔的成本。然而，相對而言，該平台是否能提供具有公信力的有效資訊，就會影響藝術品消費者對於該品牌的忠誠度。除了消費者期待有可信賴的資訊之外，與實體通路最大的不同便是使用者介面的便利性，網路平台的快速性與高效率，成為能夠降低購買成本的優勢條件。需要注意的是，由於消費者轉而直接以網路平台介面直接接觸銷售端，因此使用者介面的便利性，會被期待以更高的標準來檢視 (Skate's, 2012)。從使用者介面在使用性與視覺呈現上，是否能提供消費者愉快的消費經驗以及介面是否容易操作，到實際消費時，交易的安全問題，以及後續作品的運送與保全等，都是網路交易平台，所需重視的品質。提供以使用者導向為考量的服務，也將是藝術品網路平台所需具備競爭條件，並發揮其效益，與實體通路做出區隔。

亞洲藝術品網路交易平台的未來性

上述在案例討論時，都多先是從西方市場的經驗來做分析，主因西方藝術市場的發展歷程較早，已具有相當的成熟度，且在藝術品網路交易平台的數量也比亞洲來的多。根據研究調查，在消費習慣的建立上，歐美的藝術品消費者，對於線上藝術消費的習慣，相對於亞洲消費者，較具信心 (Hiscox & ArtTactic, 2013)。亞洲地區的藝術品網路交易平台，在培養消費習慣方面與真偽機制的建立上，仍待一定時間的發展，來累積市場經驗。然而，隨著中國經濟實力的提升，亞洲華語地區的藝術市場正迅速掘起。TEFAF (2012) 在一份全球藝術市場觀察的報告中，便指出亞洲藝術市場的發展潛力，尤以當前的中國市場最為顯著，其約佔有全球藝術市場的 30%，且單就其拍賣市場，於 2011 年，就在全球的藝術拍賣市場，已達 42%。

當前在亞洲華語地區的網路藝術交易平台 (以自亞洲發展起的為例)，從交易方式來分析，其最常見的仍是 B2C (Business To Customer) 的線上拍賣，以及 C2C (Customer To Customer) 的平台，即由中介者提供交易平臺而不直接提供拍品。前者如嘉德線上、趙湧線上、HIHEY 等，都採 B2C 並結合網上拍賣的形式，或是如 Artshare，採線上策展結合銷售的模式；C2C 平台則多以單純電子商務為主，如淘寶網。除了 Artshare 訂價策略上較其他網路平台不同，專注於中高價位市場上，其餘大部份的平台經營者，傾向於中低價位的市場。而無論採何種模式，可以觀察到，越來越強調「專業整合的複合型藝術服務」，以多型態

的經營模式並存於網路藝術市場之中。不只提供拍賣平台，還透過專題企劃或學術合作等，提升多樣性與專業的服務；跨媒體平台的整合如非池中藝術網，結合了媒體資訊與拍賣網資源，並向其他的電子商務平台 (如 yahoo) 尋求合作的可能性。而雅昌藝術網，作為一媒體平台之外，匯聚一級市場與二級市場的資源，同時強調其市場數據與研究報告的優勢。此外，在執行的準則方面，各平台也逐漸以使用者為導向的考量，來持續的發展其適合的執行方法，如 HIHEY 試圖建立其一套線上拍賣業務的準則以及執行標準化流程，同時也固定有常態性的專場拍賣；飛馳中藝術拍賣網，採用線上拍賣、實體成交的方式，試圖滿足消費者若需看到藝術實品的需求；在作品運輸方面，嘉德線上採用了嘉德配送方案和個人自取方案兩種，尤其若是較為高單價的藝術品，則會跟消費者溝通由消費者來自取。這些措施都是期望消費者能夠於使用上更便利，擁有更好的服務。

建構具可信賴的品牌形象非常重要，Hiscox & ArtTactic (2013) 的報告顯示，平台能提供具有獨立性的研究報告，藝術消費者較有信心；清楚明瞭的視覺呈現，以及有效的細節資訊，是網路消費者最為重視的部份，此外，擁有安全的交易機制與作品運輸保險，以及是否有退貨機制，都是消費者所在乎的面向。西方市場的經驗，因地域偏好、消費習慣、語言介面使用習慣的不同，亞洲市場固然無法將其完全複製，但仍可借鏡西方市場的經驗，立基於國際的消費趨勢，發展區域特色。亞洲藝術品網路交易平台，在定位上該如何做出區隔，這都倚靠中介者是否了解其網路消費族群是誰，消費者究竟偏好的藝術品類型與

品項為何，從而建立自身明確的品牌形象，包括硬體實力，如網站的使用介面的技術支持；軟體實力，如品牌選件的標準與提供的藝術服務。

本研究綜合眾多模式來看，認為「建立明確的品牌形象」、「專業整合的複合型藝術服務」、「發展亞洲市場特色」為亞洲華語市場要發展藝術品網路平台的核心重點。在地區市場發揮其公信力，培養消費者的信心，將成為其累積亞洲市場資源實力的關鍵。處於發展中的亞洲藝術品網路平台，是否能具備有指標性的亞洲經驗，是未來值得持續觀察的市場動態。

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註

- 「飛馳中藝術拍賣網」與「非池中藝術網」由帝圖科技文化經營
- 調查期間為2011年7月到12月。
- 其中，社群類進榜有26家，位居第一，而線上娛樂類，以及生活資訊、服務查詢類，均分別以14家入榜，並列第三（數位時代，2012）。
- 當前的電子商務形態，主要有B2B (Business to Business)、B2C (Business to Consumer)、C2B (Consumer to Business)、C2C (Consumer to Consumer) 的四種經營模式。
- 該份報告，針對200多名國際收藏家與58家當代國際藝術畫廊做問卷調查。
- 該報告還顯示，26%的收藏家曾以超過5萬英鎊的價格在網上購買藝術品，從消費年齡層來看，並非只有年輕人才會參與藝術品網購，65歲以上的受訪者中有55%表示自己曾經直接在網上購買藝術品，其中18%表示，願意為依據網上所展示的藝術品出價至5萬英鎊以上。



Thematic Paper Session

The Platform of Online Art Trading:
An Initial Analysis between the
Asian Chinese-speaking Market and
Western Market¹

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Paper Session I / Industrial Environment & Trends

Abstract

Over the past years, as the consumption patterns change and the platform of artwork e-commerce grows immensely, the issue of the online art market has attracted a wide attention once again. By comparison to the development of the online art trading platform in Western market, the Asian market is still in the early phase of development. In recent years, the patterns of the online art trade have seen an evolution trend, which differs greatly than before and produces discernible effects. This paper discusses the current development of the online art trading platform in Western and Asian Chinese-speaking market. By making the comparisons and analysis of the trading patterns among different platforms, the paper aims to comprehend the progress and tendency of the online art market and further analyze the operational models and strategies employed by various platforms.

This paper will be divided into two parts. The first part defines the characteristics of artwork when it comes to the online consumption, based on the theory of consumption, and further sheds light on the nature of art trade. In the following, through the discussion on the features of electronic commerce's development, it tries to indicate some possible limitations that the online art trading platform might encounter. The second part thus deals with the types and operating models of online art trading platform in the Western and Asian Chinese-speaking markets. It is categorized in follow: 1. Simple e-commerce platforms; 2. Online platforms that provide integrative services for art trade; 3. Platforms that exhibit in the form of art fair

and curated exhibition 4. Channels comprised of physical outlets and e-commerce. By analyzing the different positions of above four types, it pinpoints the phenomena and effects for each platform, and proffers the advantages and disadvantages for each platform according to the current trend of marketplace. In the end, based on the ground of case discussion and research reports, this paper proposes that the three key factors as "building an explicit brand image," "providing the integrative, complex and professional services for art trade," and "developing the features conformed to the Asian market," will play a crucial role in enhancing the Asian Chinese-speaking market's competitiveness, which will strengthens its niche of developing the online art trade in this regional market.

Keywords: platform of online art trading, Asian online art market

Introduction

As the consumption patterns transform nowadays, and the online art trading platforms grows, the relationship between art market and e-commerce has for long been a hot issue. Around 2000, quite some auctioneers and galleries had tried to tie with websites for art trade, yet the outcomes were mostly unsatisfactory due to the immaturity of economic environment and artwork consumption. Except for a few cases, for instance, Sotheby's sold the 1823 printing of Declaration of Independence for USD 8 million over websites in 2000. According to the report on global online art trade, conducted by Hiscox (a Britain insurance company) and Arttactic (a research institution for art market) in 2013, the

current state of artwork online trade amounts is around USD 870 million, which though occupies only 1.6% of art market, but is expected to soar by a growth rate of 19 % and reach USD 2.1 billion by 2017. As the quantity and total trading amount of art pieces over online platform have seen a gradual increase, the general public has begun to consider online art trade as an option. Christie's, a world-renowned auction house, has initiated an online auction "Andy Warhol @ Christie's" in February 2013. In Asia, several online exhibition and transaction platforms have emerged in the past years too—Artshare, founded in 2013, deals with the modern and contemporary artworks from Asian countries, while the Artrade.com of Guardian, prompted by the auction house in mainland China, and the Art Emperor² in Taiwan have been established in recent years. However, some concerns regarding to the online art trading remains closer examination, such as the authenticity and the quality of artwork, the debate on whether the high-priced artworks would conforms to the online sales, and the supplementary measure associated with transaction and transportations, and so forth. In the following, to further comprehend the trend and development of the online art trade nowadays, this paper aims to discuss the current state of the online art trading platforms in Western market and Asian Chinese-speaking market.

I Cultural Consumption and Artwork purchase

Artworks have two inherent qualities: decorativeness and intellectual appeal. As the former refers to the exterior characteristics,

such as sizes, materials or themes, the latter is involved with the intrinsic connotation, such as the quality of an artwork, its historical significance and the artist's reputation (Singer, 1978). Since the Postmodern Consumerism onward, a piece of artwork has entered the phase of consumption from solely appreciation, and has become a commodity in the chain of cultural consumption. Just as Jean Baudrillard says, the nature of consumption lies not in the commodity itself, but in the symbol it represents. In the process of consumption, consumers have got to identify with the commodity, find their positions in the society, and realize their aesthetic tastes therein. As discrimination appears over something, a discrimination of tastes emerges, which to some extent responds to the differentiation of social hierarchy (Lin, 1997). Compared to other commodities, the uniqueness and originality of a piece of artwork manifests its own authentic value, which, as a kind of verifying authenticity, contains the essence of cultural values (Throsby, 2001) and has qualities of irreplaceability and rarity. Simona Botti (2000) explores the characteristics of artwork consumption from three areas of needs, namely, cultural needs, symbolic needs and social needs. For consumers, purchasing artworks satisfies their need of cultural needs that are grounded on pursuit of knowledge. In regard with symbolic needs, it represents consumers' personal personality and social status as well as the culture s/he belongs to (Bourdieu, 1984; Lury, 1996), whereas the social needs refer to the link between art-related commodities and social interactions, which functions as a channel of communication among people and can meet the buying person's needs for socializing. For artwork purchasers, the inherent symbolic value indicates that the buying person has

owned an entitlement to cultural capital and taste, while having accumulated experiences and satiated their desires during the process of the construction of values and meanings. Such embodiment of “conspicuous consumption” is the essential difference between art-related consumption and common commodities.

People who would purchase artworks are mostly very individualistic, with a pattern of art consumption. As James HeilBrun and Charlese M. Gray (2004) asserts, consumers will be swayed by the following five influential factors such as wealth, liquidity of artworks, risks involved, expected return, and tastes and preferences. As the first three factors are measured by economic reasons; therein, an artwork is an asset with higher perceived values than functionality. This explains why the capability of purchasing artworks is usually equivalent to one’s wealth. As to the lower liquidity and higher risks associated with artworks, both reflect the obvious uncertainty and seeable oscillation of artworks in the marketplace. On the other hand, the latter two are measured by consumers’ personal experience. Although expected returns can also be objectively estimated according to the consumer’s understanding of art market, the pleasant feeling brought forth by aesthetic enjoyment plays a pivotal part in swaying the consumer’s opinions. The tastes and preferences of a consumer are developed by his/ her past experience of consumption or engagement with art-related activities. Olav Velthuis (2011) discusses consumption of artwork from three aspects: motivations for liking the artwork, motivation for financial gains, and motivation for socializing. Though slightly different, the concepts adduced by the above two scholars are

rather similar, as they are basically divided into economic stimulus, social symbolic meanings of art consumption, and personal perception and appeals to sensitivity. Furthermore, in the process of art consumption, consumers neither accept any commodities passively nor will they internalize the meaning of a sign created by the market. Oppositely, they make proactive efforts to participate in the construction of the meaning of signs for artworks according to their comprehension and appreciation. Hence the consumer’s private, subjective past experience renders art consumption the feature of prior expectation (Throsby, 2001:116). Prior expectation plays a crucial part in swaying a purchaser’s decisions at the final moments. In summation, art consumers’ habits and their needs for information immensely influence their decision making. We will explore the characteristics of electronic commerce (hereunder refers to e-commerce) and the connection between e-commerce and consumers’ habits and needs for information in the parts that follow.

II The Development of E-commerce

With the popularity of the Internet, e-commerce has made impressive progress over the last decades. According to the survey of “Top 100 Websites in Taiwan” conducted by the Digital Times Magazine in 2012, among the distribution of websites (which are roughly categorized into ten types), e-commerce websites amounted to 15 and won second place from fourth place in 2011³. According to principal definitions, e-commerce is referred to as a trading or transaction for merchandize or service, of which the traditional

business is done via websites and electronic transmission in a digital format. This is a new business model (Greenstein & Feinman, 2000). From the viewpoint of trading parties and service quality, Kalakota & Whinston (1996) thinks that e-commerce holds a specific advantage in synchronizing all business activities, including purchase, selling, products and services, and satisfying the needs of the organization and consumers before making improvement on products, services and the quality and speed of transmission and ultimately reaches the goal of cost-down. Lu (2005) proposes similar concepts, asserting that through web-based commercial transactions, multi-facets of values can be provided, of which web-based technology, commercial processes and economic values are three components to the spirit of e-commerce. Meanwhile, with the advances of technologies, a wide array of carriers of e-commerce has been developed, including computers, smart phones and any other carrier that can be used for web browsing. Messages pertaining to services or commodities can be delivered to the other party through all these carriers (Chen, 2010). Such delivery of consumption services through web-based carriers makes transaction possible no matter where the trading party is and without time constraints.

As discussed above, e-commerce can be applied in a wide range of areas, and many studies have focused on website types, interfaces, business models⁴ so far. For e-commerce to hit the success, you cannot just place information onto websites and hope that clicks rate can soar in no time. In this age of information explosion, only right business decisions can win the attention and loyalty from

consumers. Amit & Zott (2001) states that among the advantages of e-commerce, “publicity,” “width of circle,” “reciprocation,” “low cost,” “high speed” and “great efficiency” are most notable. Furthermore, individualistic consumers can employ any of the above advantages to create optimal results for themselves. Garicano & Kaplan (2000) considers e-commerce an ideal way to revise manufacturing or transaction process, advance efficacy (such as lowering the cost of searching and providing more product-related information for purchasers), and thus lower costs. In short, e-commerce can massively shorten the operating process and decrease activities that other forms of trading might require. Chen (2010) has collected research results by many scholars and discovered that e-commerce shortens business procedures, cuts back on the cost for searching that a deal needs and curtails transaction procedures with information technology or tools. Hence its greatest value lies in an innovation of conception and processes.

At the same time, e-commerce is not without downsides. As Liu (2009) alleges, e-commerce requires public policies and technological standard as supporting pillars. Public policies are comprised of managerial problems such as the access to use, privacy right and information pricing, whilst technological standard refers to supervisory facets like documentation safety, Internet protocol, Web transmissions and so on. Only having control over the above two capabilities can e-commerce move forward. Shortly speaking, any lack of development in public policies or technological standard can lead to problems for e-commerce. Meanwhile, Liu (2009) thinks there are five obstacles to e-commerce

development, namely, 1. The creativity and operating model can be easily copied; 2. The costs for website construction, maintenance, advertising marketing, and customer service are relatively high; 3. Being short of the back-end integration; 4. The profit rate dwindles over time; 5. The public needs reeducation for web-browsing. The authors regard public policies and technological standard are both key to future's development. Hence if the government will take proactive actions to stipulate regulations and technological standards to meet the needs of operating companies and consumers are issues at stake. However, when it come to online art trading, whether the higher costs of advertising services and the dwindling rate of profit that Liu's (2009) mentioned above, would be applicable needs more further discussion. The other three factors are indeed points out the emergent challenges for those who tend to develop the online art trade.

III Can E-commerce be Applicable to Art Trading?

The art market is composed of suppliers who provide artworks such as paintings, sculptures and antiques for selling, and consumers such as collectors, art organizations or the generations of the artists, who feel interested in seeking and purchasing artworks. Auction houses, galleries and art consultants act as agents to meet the needs of suppliers and consumers alike (Velthuis, 2011:33). We cannot but measure the commercial value of an artwork by money. The agents, such as galleries or art dealers, control the operations of art market (Sun, 2010). However, whether it is primary or secondary art market, the price of an

artwork is decided by a number of factors, including factors directly related to the artwork like the size, materials, the condition of the work and factors such as the fame of the artist, the painting techniques employed in that artwork, and the authenticity of that artwork. Moreover, the aforementioned factors can be changed in accordance with geographic or timeframe reasons (Sagot-Duvauroux, 2011). Since the price of an artwork is apt to fluctuate, the cost of buying cannot be objectively calculated either. Generally speaking, transaction cost and information cost are two major expenditures (HeilBrun & Gray, 2004). In the earlier discussion on the characteristics of artwork consumption, art consumers depend more on "expectation," consumption habits, and their need for information, and the authenticity of a piece of art elevates the value to being irreplaceable. In summary, the edges of e-commerce lie in its capability to provide highly effective, open-ended, and reciprocal transactions for all involved. Hence we will discuss whether e-commerce can be applied to artwork consumption in the following three facets: 1. The "present-ness" of appreciating artwork; 2. The consumption habit of art consumers; 3. The concealment of art market.

In short words, e-commerce has inherent limitations to further development, as the operating models can be accessibly duplicated, and the public's web-browsing habits should be enhanced. New problems may lead to the e-commerce of art trading since the distinctive features of artworks. Therefore, tasks including how to assuage or even eliminate the problems or risks, helping consumers to better acquainted with art market, and providing the services they are seeking, are the frontal challenges when it comes to the combination of

e-commerce and art trading.

IV The Developments and Current State of the Online Platform for art Market

In August 2013, Amazon, a leader in e-commerce field, officially introduced AmazonArt to the public by working with 150 galleries and over 40,000 artworks produced by about 4,500 artists. Among them we can find stared artists like Damien Hirst and Andy Warhol, and the price ranges from USD 10 (a screen-printing work by newly emerging artist Ryan Humphrey) to the USD 4.85 million painting by Norman Rockwell. Yet most of the works are priced between USD 500 to 5,000, as the target are aimed at common art consumers instead of collectors. This was not Amazon's first shot at e-commerce for artwork trading, however. As early as 1999, it had collaborated with Sotheby's to sell pieces of art over websites and become the first ever international art auctioneer that conducts online auctions. The biggest (and very rare) success came from the deal done for the printing of Declaration of Independence, which was hit at an astronomical price of USD 8 million. Afterwards, Sotheby's had sought cooperative opportunities with eBay to open another window for artwork trading. In 2003, Sotheby's stopped all business relating to artwork transactions due to continual deficits in online trade. Artnet followed suit and opened online auctions in 2004, and shortly backed out owing to financial loss too. In Taiwan, Art Taipei cooperated with some technology firm to organize an "online art fair" in 1997, and at roughly the same time, Caves Art Center and Lung Men Art Gallery had tried to start up online galleries for some time. Both were closed down as the profits

were not as expected to be (Shih, 2012; Art Bank News, 2012). Even though the connection of artwork trading and e-commerce had seen a light of hope years ago, the dot.com bubble and financial tsunami has since spread all over the world, leading to an early failure to this combination. It was not welcome by consumers or art dealers, with rather dim prospects across Taiwan and in foreign countries. The platform of online art trade had backed off from e-commerce since then.

Several years ago, some brands have plunged into e-commerce for artwork, such as Christie's and AmazonArt, Artnet and Sotheby's, the latter two of which re-started online auctioning business in 2008 and 2010 respectively. Comparatively, Asian market is several paces behind, as @Gallery Tagboat (of Japan) was founded in 2003, and Art Emperor Auction in Taiwan went online in 2010. In mainland China, ZhaoOnline.com and Artrade.com of Guardian was founded in the early 2000s. Both are primarily engaged in artwork trading since 2010. As the online art trading platforms have mushroomed in recent years, the probability of survival of such platforms has become hot issues under discussion once again. With this comeback trend, does the entire environment reopen this path or have business owners made strategic endeavors to bring back the tide? It needs further observation. In the "2011 Art Market Report" undertaken by the Skate's (2012), the Skate's boldly announced that the prospect of art industry developments lies in the convergence with e-commerce. It might not be inappropriate to allude to art market and e-commerce as "familiar strangers". Both need time to adjust and find a way to get on well. In the above-said Skate's report, online transactions for artworks

have gained momentum in recent years, and have tried to emulate other business models of venture capitalists, though still with no seeable results yet. In today’s art industry, the online platforms that combined with e-commerce have adopted various models and strategies with differing positioning and expectations. We will discuss this in the ensuing parts.

In the respect of the whole industry’s environment, according to the statistics by the Skate’s (2012), the top five online platforms combined with art industry and e-commerce are eBay (which in global network flow ranked as #20), followed by Liveauctioneers, Artnet, Christie’s, and Heritage Auction, all of which ranked as behind #10000. In 2012, eBay edged slightly ahead to #18, followed by Getty Images (ranked as #3505), while Liveauctioneer, Artnet and Christie’s all saw

a decline in rankings (Table 1). This illustrates the platform of artwork online transaction is still unstable and unable to win attention from a large number of people. It leaves ample room for development.

Compared with the year of 2000, presently smart phones and wireless web browsing are inexpensive, speedy and thus become popular, not to mention the increasing numbers of mobile carriers and Apps have dictated people’s habits of mobile networking. Put differently, people’s reliance on mobile networking and habits have seen a growth. According to the “Artworks Online Transaction Research Report” by Hiscox & ArtTactic (2013), art consumers have developed a confidence in purchasing artworks via electronic files only. Among the research samples, 64% of the collectors have had the experience of directly buying artworks

Table 1 Platforms for Online Art Trading: Global Network Flow Rankings

Ranking for 2011	Global network flow (ranking)	Ranking for 2012	Global network flow (ranking)
1. eBay	20	1. eBay	18
2. Liveauctioneers	10,133	2. Getty Images	3,505
3. Artnet	11,152	3. Liveauctioneers	10,486
4. Christie's	11,771	4. Christie's	19,509
5. Heritage Auction	19,436	5. Artnet	18,509

Compiled by this paper [Source: Skate’s, 2012; Skate’s, 2013]

Table 2 A SWOT Analysis on Platforms for Online Art Trade

SWOT Analysis art agents/ selling end	
<p>Strengths</p> <ul style="list-style-type: none"> · 24 hours operations without the constraints of time or space. · Through click rates and browsing flows, the audience's likes or dislikes can be better grasped. · Cost-down for displays and marketing. · A lower threshold for visiting, which expands the scope of visiting people. 	<p>Weaknesses</p> <ul style="list-style-type: none"> · The aesthetic appeal of an artwork vanishes. · Visitors cannot communicate with the salespersons directly or feel the atmosphere at the exhibition. · Buyers lack confidence in higher-priced artworks. · Trading information has to be partly disclosed.
<p>Opportunities</p> <ul style="list-style-type: none"> · Habits for online transactions have been more common among the public. · Younger generation's dependence on web browsing. · Resorted to the help of high technology, such as 3D presentations. 	<p>Threats</p> <ul style="list-style-type: none"> · Attacks from hackers. · Online trading cannot be without Web networking. Once the system failed, the transaction would be ineffective.
SWOT Analysis art consumers	
<p>Strengths</p> <ul style="list-style-type: none"> · Browsing is instant, not hindered by time or space constraints. · As information cost decreases, it is easier to get to know about the market. · Lower threshold to allow all groups of consumers to search for what s/he needs. · Higher concealment. 	<p>Weaknesses</p> <ul style="list-style-type: none"> · The consumers have too many choices to find what most attracts them. · Cannot see the artwork directly. · Doubtful of the authenticity or price of a work of art and lacks in confidence. · Lacks satisfaction brought by social gathering in actual exhibitions or galleries.
<p>Opportunities</p> <ul style="list-style-type: none"> · Art becomes a part of life. · Expands the horizon to appreciate artworks. 	<p>Threats</p> <ul style="list-style-type: none"> · One's account may be hacked or transaction safety may be compromised. · Too dependent on information from webs.

from online platforms (without any contact with art dealers). And 71% of the collectors have made a decision to purchase a piece of artwork with only reference to digital electronic files⁵. Apparently this online consumption has become more acceptable to today's art buyers. In the meantime, in view of the pyramid of art industry, the higher-priced artworks have gained a solid ground as they are worth investment and collection for future's appreciation. Yet the lower-priced artworks are in want of a new battlefield due to crowding-out effect. The online platform seems to be a good alternative channel.

Although online transactions have the potential of further exploration, the survey by Skate's (2012) showed that presently art industry primarily works in physical operating models. Some 65% of the companies have yet to transfer the main business to an online model. From the perspective of art industry, physical operations occupy 70% of the pie, while 15% of the business is left to online trading. The companies that overlap physical operations and online platforms reach 15%. From the figures listed above, there remains broad room for growth in online trade. On the other hand, company owners that make a quick move toward this trend will have a better chance of gaining a competitive edge in the market.

V The Online Art Trading Platforms: Analysis of Strategic Models

As explored above, the platforms for artwork online transactions have been evolving without presenting a distinct model. We will further categorize operating models into four types, namely,

1. Simple e-commerce platform, such as eBay, Taobao, Yahoo and ICHIBA;
2. Online platforms that provide integrative services for art trade, such as AmazonArt, Artprice, Artnet, Artsy, and Artfacts.net, and @Gallery Tagboat (form Japan), Hihey.com and Artron.net;
3. Online Platforms that exhibit in the form of art fair and curated exhibition, such as VIP Art Fair and Artshare; and
4. The channel comprised of physical outlets and e-commerce, like Sotheby's, Christie's, Saatchionline, Heritage Auction, Artrade.com of Guardian, ZhaoOnline.com and Art Emperor Auction are renowned examples.

VI An Analysis on the Phenomenon regarding Platforms for Online Art Trade

Here we will carry the SWOT analysis to pinpoint the current conditions of today's artwork online transaction from the perspectives of an agent (who sells) and consumers (see Table 2). As e-commerce and online shopping has gained popularity within the society, art agents all wish to take advantage of the characteristics of e-commerce, like openness, efficacy, and better interaction, to create a new business model that can be more accessible to common consumers via highly effective interactions without constraints of time or space.

Even online consumption has become more popular with civilians over the past years, it is still uncertain what kind of people will be the target consumers for art agents. Maybe the question to ask is "Who will buy artworks via websites?" instead of "Who are the online buyers?" Collectors who frequent physical channels might not have the habit

of online shopping, while people who are acquainted with online shopping may be reserved at purchasing artworks via web networks as they harbor doubts as to the authenticity and price of an artwork. Obviously, if art dealers continue to utilize similar strategies that traditional art market has been using over physical channels, they will never build a sustainable business model for artwork trading.

Conclusions: The Future Potential for Online Platforms for Artwork Trading across Asia

We have cited cases from Western experiences of developing art markets, as Western art markets have had longer history and have more online platforms for art trading than Asian art markets. According to a survey, European and American art purchasers have had better confidence in shopping online than their Asian counterparts (Hiscox & ArtTactic, 2013). The online platforms across Asian countries still need time to develop consumers' shopping habits and build a system of authenticity. Yet with the strengthening of China's economic power, the Asian Chinese-speaking market has seen a rise already. According to a report on global art market observation released by TEFAF (2012), China's market is endowed with the best potential round Asia in the near future, which is estimated to have a 30% share of the global art market. In view of the market of auctions, China occupied 42% of the art market worldwide in 2011.

For the time being, the commonest ways of

transactions in Asian Chinese-speaking areas are B2C (Business To Customer) online auctioning and C2C (Customer To Customer) platforms. As to B2C auctioning, online platform such as China Guardian, ZhaoOnline.com and HIHEY are famous examples. In regard with online exhibition coupled with selling, Artshare is a good example. C2C refers to those simple e-commerce websites such as Taobao, as the agents provide a platform rather than auction items for customers. All these platform operators, except for Artshare, which focuses on middle-to-higher pricing, aim for a lower-pricing market. No matter what the model is, now it is apparent that complex, integrative art services coexist in web-based art markets. Such platforms that provide multiple art services not only provide a place for auctions, but will launch projects or academic cooperation as well. Take Art Emperor Auction as the example, it combined the resources of multiple media with the auctioning website, while seeking cooperation from other e-commerce platforms like Yahoo. Artron.net also gathers the resources from the primary and secondary markets, while boasting its advantage of market-related data and research reports. Furthermore, in the respect of protocol for execution, all platforms have gradually inched toward user-friendly direction, so as to develop most suitable execution methods. HIHEY has made efforts to build the guidelines and SOP for online auctioning, and hold the auction regularly. Art Emperor Auction chooses online auctioning, yet consumers still can view the artwork they had bid for in person before they make the deal. With regard to artwork transportation, China Guardian provides the

consumers with two choices, delivered by company or pick-up by consumers in person, especially in the case of higher-priced artwork. All these measures indicate that the online art trading platforms inclines to provide the better and more convenient services for consumers.

As displayed by the report by Hiscox & ArtTactic (2013), building a reliable brand image is of great importance as platforms can provide art customers with independent research reports, which can boost their confidence. Moreover, clear, distinct visual presentation and effective details are what online consumers that concern most. Safe transaction systems and insurance for artwork transportation, along with a refund system, are also what consumers would pay attention to. Asian markets might not be able to copy the experience from the Western market experience as we have very different geographic locations, consumption habits and online interfaces (based on languages); still, Asian markets may learn the lessons from the Western market and the global trend, and further develop their regional strenches. In what way could Asian online art trade make discriminations and distinguish their own niches? Agents should find out the target segment of online consumers and what sorts of artwork they prefer. These are significant for building a distinct brand image, including the hardware like the technological support of website's interface, and software niche, like the standard for presenting the artwork and other art-related services.

Based on the discussion of the business models above, it concludes that “building an explicit brand image,” “providing the integrative, complex professional services for art trade,” and “developing the features conformed to the Asian market,” will be the crucial part in sharpening the Asian Chinese-speaking market's edges and developing the online platforms. In addition, to enhance the consumers' confidences will also play an important key in this region market. Whether the Asian online art trading platforms, as a emerging and burgeoning market, can become the representative for Asian experiences is a significant issue worth observing in the near future.

Note

- 1 Owing to the length of publication, the English edition of this paper would differ from the original. Some of discussion may be omitted. Please note that this version might not be suitable for citation.
- 2 Both “Art Emperor Auction (飛馳中藝術拍賣網)” and “Art Emperor (非池中藝術網)” are operated by Art Emperor Technology & Culture Co.,Ltd. .
- 3 Among them, there were 26 websites for social media, ranked as #1, followed by 14 for online entertainment, information for living, and service inquiries, as the latter three were all ranked #3. [Digital Times, 2012]
- 4 Presently the business models of e-commerce can be categorized into B2B (Business to Business), B2C (Business to Consumer), C2B (Consumer to Business) and C2C (Consumer to Consumer).
- 5 In the report, a questionnaire survey was done among more than 200 collectors and 58 contemporary art galleries globally.

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1980 年完成碩士學位，1985 年獲得荷蘭烏茲列特大學歷史學博士學位。其後，任教於烏茲列特大學、鹿特丹伊拉斯謨斯大學及萊登大學。1987 年，轉而任教於馬斯垂克大學並擔任多項職位。

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學程主任、歐洲公共行政事務碩士課程創辦人兼系主任、藝術與文化遺產之政策、管理與教育創辦人及系主任，同時擔任愛爾蘭都柏林大學文化政策與藝術管理碩士學程之校外監審員。目前其主要研究方向為文化政策、文化遺產保存與管理。現為多個編輯委員會以及歷史、文化遺產、藝術及文化等組織之成員。

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He was vice-dean for education in the Faculty of Arts and Social Sciences for over six years, member and vice-chair of the University Council, several terms chair of the department of history, director of studies of the bachelor program in Arts and Culture, one of the founding fathers and first director

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學術論文發表

藝術行政——藝術這門行業

派特·維勒尼芙

佛羅里達州立大學

組別 學術論文場次 II / 藝術市場 - 量化與質化調查分析

在本論文中，我將就實際操作與論文研究兩個層面，去探討何謂藝術行政。在呈現美國藝術機構的法律架構概廓，並定義藝術行政之後，我將討論美國藝術行政研究所課程內容，並以我管理的佛羅里達州立大學課程為例提出說明。

美國正式組織可分為三類：1) 營利組織，也就是目的為賺取盈利的企業或工業；2) 制訂規章或提供服務的政府單位；或 3) 非營利組織，也就是以大眾利益為目的，並通過美國國家稅務局¹法規認可。其企業或工業營運獲得之利益將回歸企業或工業擁有人、股東或其他控制該組織之人員。非營利組織也會產生收入，但其獲利必須使用在組織設立之目的，而不是圖利任何具有管理能力之人，例如執行總監（超出雇用標準薪資之外）或監管組織之大學董事會。與營利企業或工業不同，非營利組織不需要繳交聯邦所得稅，這是一筆相當可觀的金額。非營利組織若是為了廣大民眾之利益運作，而不只是為了特定的小眾服務，就有可能獲得美國國家稅務局認可為 501(c)(3) 類慈善機構。這個特殊稱號讓他們可以獲得可免稅的捐贈款，也就是說捐贈者可以節稅，藉此做為慈善捐款的獎勵。一般被認可為非營利組織的機構包括圖書館、禮拜場所、學校、博物館、藝術與人類服務組織 (NCCS)。

美國的藝術組織通常不是政府部門，而是以 501(c)(3) 類慈善機構的型態運作。大多數的非營利組織必須確保每年有足夠的資金，來源可能是補助金、投資、捐款、薪資或其他所得，因此在經濟蕭條時期會特別困難。Katz (2011) 在一份提交給美國博物館聯盟²的報告中提到，當前的經濟現況替美國藝術組織帶來許

多挑戰，包括博物館在內，他指出「超過七成的博物館均表示感受到經濟壓力，程度從中等 (39%) 到嚴重 (14%) 到非常嚴重 (18%) 都有。表示『非常嚴重』的博物館形容，『是至少過去五年來最糟糕的』(第二頁)。」根據此報告書，大多數的博物館面臨資金減少，不論是從政府來的資源、投資收入、捐款、會員費、入場費或其他收入所得。

由於取得公共與財務支援愈加困難，許多博物館必須重新考慮威爾 (Weil) 在 1999 年提出的警告，從關於某物（物體）的轉型為為了某人（訪客）的機構。其他藝術組織也同樣重新檢視了他們所提供的服務，以獲得更廣泛大眾的支持。我認為當今現況需要訓練得當的領導者，要瞭解非營利世界的運作，並擁有廣泛的背景知識和技能，才有辦法同時處理組織與觀眾與經濟狀況。然而，非營利組織的管理者通常是靠著升遷制度爬上來，且只具有特定領域的訓練。舉例來說，博物館館長所受的訓練與過往工作經驗大多為策展人，取得的學位通常是藝術史。一旦晉升到領導者位置，他們才會體會到自己尚未準備好從事這個新角色。

在此舉一個例子。安卓是第一次擔任博物館館長。她攻讀藝術史博士學位，專精於文藝復興藝術。她對於學術寫作相當在行，對於推薦收購物件或策展都很有信心。但是館長的位置還包含其他許多責任，而且她不知道如何應付員工問題、評估計劃成功與否，也不懂得策略規劃。她也不知道如何策畫招募會員活動、招募資金、讀財務報表、或為博物館規畫預算。她能找誰幫忙？負責雇用安卓並監管博物館運作的董事會成員均任職於營利組織。卡洛斯也是一例。他是墨西哥裔的美國公民，也是博物館董事會的新成員。

他到墨西哥旅遊過幾次，累積了一些來自墨西哥的收藏品。他看到美術館裡面的展覽，受到啟發，決定在附近的商業中心設立一家墨西哥博物館。雖然他是成功的企業家，卻不瞭解營利組織和非營利組織之間的差別，而想要「擁有」一家博物館，想要把博物館設立成一個小企業，且同時收到公共補助金，但那是不可能的。雖然上述兩人在各自的領域都訓練精良且經驗豐富，安卓和卡洛斯都無法勝任 501(c)(3) 類慈善機構的管理者一職。

藝術行政這門專業領域，就是為了解決這類的知識不足，讓學生準備好在非營利藝術組織工作。藝術行政涉及公眾與觀眾，並且從事藝術商業活動。課程內容或許和設計給營利組織的企業管理碩士 (MBA) 重疊，但實際上大不相同，因為非營利組織不是企業，也就是說，有自己獨特的需求和規定。

藝術管理教育聯盟 (Association of Arts Administration Educators, AAAE) 是在美國設立的一個專業會員制聯盟。該聯盟為藝術行政研究所課程設定標準，課程應該要包括：

- 社區參與
- 財務管理
- 組織領導與管理
- 藝術國際環境
- 藝術法律與道德環境
- 行銷與觀眾拓展
- 募款
- 藝術政策
- 藝術產出與銷售

- 研究方法
- 策略規劃
- 技術管理與訓練

每個標準課程會包含概論與原理闡述，以及如何評量學生的表現水準。

我為佛羅里達州立大學³主持的藝術行政研究所課程，歡迎視覺和表演藝術各領域背景的美國與國際學生參加。碩士 (M.A.) 與博士 (Ph.D.) 學生必修的四門課，都會採取藝術管理教育聯盟標準：

- 藝術行政課程
- 管理藝術組織
- 公共部門的藝術行政
- 藝術與社區服務

另外還有選修課程，依照學生的背景與職志，建議選修「經費申請企劃」、「領導管理」、「藝術行銷」或「資金募集」，碩士學生還需要在藝術組織完成約 400 小時的實習。

我教授「管理藝術機構」這門課，因此將利用我的課程內容來示範我如何在組織領導與管理這一塊，採取藝術管理教育聯盟標準。課程概論與原理闡述部分寫道：「藝術事業的本質就是協力；學生必須了解領導概念與群體動力，才能了解如何適應不斷變化的工作環境。在這個領域工作必須具備集各種領導風格為一體的能力…」(藝術管理教育聯盟，第 12 至 13 頁)

雖然我們的課程採用 Byrnes (2008) 或 Korza、Brown 與 Dreeszen (2007) 的藝術行政文本，我還選擇了其他具有價值的書籍，像是波曼 (Bolman) 與

迪爾 [Deal] 共著的《組織重構：藝術、選擇與領導》(2008)。這兩位作者調查組織理論文獻，分別以四個框架和管理組織方法呈獻(請見表 1)：

表 1 波曼與迪爾的四框圖 (2008)

框架名稱	框架象徵
架構的	工廠
人類資源	家庭
政治的	叢林
象徵的	寺廟

他們解釋了這個方法：「我們想將宏觀的、複雜的理論研究與實踐，以最簡單的方式呈現。我們試圖不要刪減，或是僅呈現如何解決管理問題的簡單方法。我們的目標不是提供解決方法，而是思考機會和陷阱的有力與前攝性方法。我們專注在管理以及領導。」

本書的前半部分是以框架做組織，可以分開且深入的探討每一個框架。後半部分則針對領導與重新架構，以及在框架中改變以適應任何狀況。整本書中，波曼與迪爾 (2008) 充分利用真實生活中的例子，來幫助讀者將理論具體化為實踐，並闡明重新架構的力量。

拜讀波曼與迪爾 (2008) 時，學生以小組的方式互相協力討論，自己設計假設性以藝術為基礎的場景。專注在每個框架的時候，他們會將內容應用再分析場景事件上面，並提出可能的因應措施。在課堂上討論人類資源框架時，我用工作小組動力提出一項活動。首先學生們依照最能代表自己風格或工作方法，自己選

擇加入哪一個小組。然後小組成員要回答以下問題：

- 我們的風格有什麼優點？
(以 4 個形容詞、名詞或片語來形容)
- 我們的風格有什麼限制？
(以 4 個形容詞、名詞或片語來形容)
- 什麼風格讓我們覺得最難一起共事？為什麼？
- 要更有效和我們共事，
其他人必須了解我們哪幾點？

透過反省與討論，學生會知道如何和各種類的人共事並尊重他人。這個活動搭配小組討論波曼與迪爾 (2008)，符合藝術管理教育聯盟對於合作的考量以及了解小組合作的力量。期中報告則可以讓學生進一步透過重新架構，實際應用作者對於領導的觀念。

在課程的第二半部，學生會研讀其他提供領導者風範的書及，以培養「領導風格的廣度」。在《從 A 到 A+》這本書中，柯林斯 [Collins] 和一群研究生找出 11 個持續超過 15 年、長期表現優良的美國公司。他的團隊試著找出這些公司成功的原因。他們將其中一項因素稱做「層級五領導」，也就是看似矛盾的個人謙卑與專業意志 組合。柯林斯 [ns (2001)] 形容這樣的領導者是「二元性的研究：態度謙卑但意志堅定，謙虛但無畏 (第 22 頁)。」他解釋道，「層級五領導將他們對自尊的需要從自身中抽離，以建立偉大的公司為更大的目標。並不是層級五領導沒有自尊或是對自己感興趣。事實上，他們的野心非常強大，但他們的野心是為了機構，而不是個人 (第 21 頁)。」

另一本書則提供較草根或者說由下而上的經營管理模式。梅耶森 [Meyerson, 2008] 在《搖搖船：如何

影響改變但不製造麻煩》一書早期的版本中，創造了「溫和激進派」(tempered radical) 這個詞。她研究個人如何在一個組織當中創造改變，但又能維持和大眾文化不同的個人價值與本體。該書作者提到她寫的這本書是為「遊走在挑戰與維護現有規範之間的人」寫的，「這些人想要成功並融入團體，而且他們想要按照可能會威脅他們成功的議程、價值和身分來走。」(例子從替未結婚的伴侶提高保險理賠金額，到提倡彈性工作時間，到替有年幼孩子的父母減輕重擔。)梅耶森列舉可能的行動，從最不主動到最主動：

- 無言的抗拒並保持真我
- 將威脅轉化為機會
- 透過協商將影響變大
- 利用小小的贏面
- 組織集體行動

完成課程讀物後，學生有機會以論文形式，將所學應用在領導風格上(表格2)。他們可以選擇：

- 找到並記錄分析一位層級五的領導或是溫和激進派
- 描述一個假設性的情況：身為一名藝術行政人員，你可以如何以溫和激進派發生作用
- 從課堂讀物或其他近年來關於領導的書籍，比較並分析兩種不同的領導概念

我認為這樣的藝術行政訓練能讓個人更有能力在非營利藝術組織專工的環境工作。再回到稍早之前的例子，藝術行政課程可以讓安阜足以應付各式各樣超乎策展功能的責任，那是管理一家博物館必備的條件。卡洛斯也會了解非營利組織不能歸私人擁有或控制，而且必須先被認可為慈善團體，才能申請公共補助金或可減稅的捐款。受過藝術行政訓練的人擁有專業知識和藝術技能，才能避免犯典型的錯誤，並增加工作效能、提昇表現，讓他們的藝術組織得以永續經營。

表 2 領導風格

來源	領導概念
波曼與迪爾 (2008)	重新架構 – 流暢地選擇適當的框架
柯林斯 (2001, 2005)	層級五領導 – 融合個人謙卑與專業意志
梅耶森 (2008)	溫和激進派 – 由內在開始領導並維持本體與價值

參考書目

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Programs, <http://www.artsadministration.org/standards-graduate/>, accessed 17.09.2013.

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Endnotes

- 1 國家稅務局，簡稱為 IRS，是負責向各人與企業收取稅務的美國聯邦機構。
- 2 一直到最近，美國博物館聯盟 (American Alliance of Museums) 才由美國博物館協會 (American Association of Museums) 改為目前的名稱。
- 3 佛州州立大學也有劇場管理藝術碩士學位，透過劇場學院、視覺藝術、劇場與舞蹈學院修課取得，也有音樂學院藝術行政碩士。這些碩士課程之間合作良好。



Thematic Paper Session

Arts Administration - The Business of the Arts

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Paper Session II / Art Market - Qualitative and Quantitative Analysis

In this paper, I will provide an introduction to arts administration as both a practice and a graduate field of study. After presenting an overview of the legal structure of arts organizations in the United States and defining arts administration, I will discuss the content of U.S. arts administration graduate programs, providing examples from the program I direct at Florida State University.

In the United States, formal organizations are classified in one of three ways: 1) as for-profit, as in a business or industry that exists to earn money; 2) as a governmental agency that regulates or provides services; or 3) as a non-profit¹ that operates in the public good or for another specific purpose, as recognized by the U.S. Internal Revenue² Code. Profits in business or industry are returned to the owner[s], shareholders, or others controlling the organizations. Non-profits can also generate income, but the profits must be used for the organization's stated purpose, rather than benefitting anyone in supervisory capacities, such as an executive director (beyond standard compensation for employment) or the board of trustees that oversees the organization. Unlike for-profits businesses and industries, non-profit organizations are exempt from paying federal income tax, which is a lucrative benefit. Non-profits that operate in the broad public good—as opposed to serving a smaller, specific audience—may be recognized by the Internal Revenue Service as 501(c)(3) charitable organizations. This privileged designation allows them to receive contributions that are tax-deductible, meaning donors are eligible for reductions in the federal taxes they must otherwise pay, which serves as a major incentive for charitable giving. Some of the types of non-profits that are generally recognized as charitable

organizations include libraries, places of worship, schools, museums, and arts and human-service organizations (NCCS).

Arts organizations in the United States are typically not government entities but function as non-profits with 501(c)(3) status. Most must secure funding on an annual basis through grants, investments, donations, and earned income, which can be more difficult to generate in tight financial times. Current economic realities have created a great challenge for U.S. arts organizations, including museums, as indicated by Katz (2011) in a report to the American Alliance of Museums:³ “More than 70% of museums reported economic stress at their institutions ranging from moderate (39%) to severe (14%) or very severe (18%) – with very severe stress defined as ‘the very worst…seen in at least 5 years’” (p. 2). According to the report, most museums experienced reductions in funding from government sources, investment income, donations, memberships, admissions, and other earned income.

As museums struggle to maintain public and financial support, many have had to reconsider Weil's (1999) admonition to shift from being about something (the object) to being *for* someone (the visitor). Other arts organizations have similarly reexamined their offerings to garner broader public backing. I contend that such contemporary demands require well-trained leaders who understand the non-profit world and possess a broad knowledge base and skill set to deal with organizations *and* audiences *and* the economic environment. However, directors of non-profit organizations have tended to come up through the ranks, with training for their specific disciplines. For example,

art museum directors have generally trained and worked as curators, with degrees in art history. When moving into leadership positions, practitioners often recognize that they are not prepared for the demands of their new roles.

Andrea, for instance, was a first-time museum director. Her doctorate in art history made her a specialist in Renaissance art; she was well prepared to do scholarly writing, recommend objects for acquisition, or curate an exhibition. But the position of director encompassed many other responsibilities, and she did not know how to deal with personnel issues, assess the success of a program, or do strategic planning. Nor did she have any idea how to structure a membership campaign, raise funds, read a financial report, or prepare a budget for her museum. Where could she turn for help? Most board members responsible for hiring Andrea and overseeing the museum work in for-profit businesses. Carlos is an example. He is a U.S. citizen of Mexican heritage and a new member on the museum board. He has made a few trips to Mexico and amassed a small collection of objects from that country. Inspired by the exhibitions he has seen at the art museum, he decided that he wanted to establish a Mexican museum in the commercial center nearby. Despite being a successful business owner, he didn't understand the differences between for-profit and non-for-profit organizations and wanted to "own" the museum, setting it up as a small business while also receiving public grant funding, which is impossible. Although both well-trained and experienced in their respective areas, neither Andrea nor Carlos was fully prepared to direct or oversee a 501(c)(3) arts organization.

The field of arts administration addresses this shortfall by preparing students to work in non-profit arts organizations. Arts administration deals with communities and audiences *and* engages in the business of the arts. Curricula may share some content with the Masters of Business Arts (MBA) degree designed for the for-profit business world, but they differ substantially because non-profit organizations are *not* businesses, per se, and have their own specific needs and requirements.

The Association of Arts Administration Educators (AAAE), a professional membership association based in the United States, has established standards for graduate programs in arts administration. Curricula should address:

- Community Engagement
- Financial Management
- Institutional Leadership and Management
- International Environment for the Arts
- Legal and Ethical Environments for the Arts
- Marketing and Audience Development
- Fundraising
- Policy for the Arts
- Production and Distribution of Art
- Research Methodology
- Strategic Planning
- Technology Management and Training

Each standard is elaborated in an overview and rationale statement and includes sample indicators to determine level of student achievement (AAAE).

The graduate arts administration program I direct for the Department of Art Education at Florida State University⁴ welcomes U.S. and international students in all areas of visual and performing arts. The AAAE

standards are addressed in four courses required for Master's (M.A.) and doctoral (Ph.D.) students:

- Administration of Arts Programs
- Managing the Arts Organization
- Arts Administration in the Public Sector
- Art and Community Service

Additional electives are available, and students are advised into courses, such as Grantwriting, Leadership, Marketing in the Arts, or Fundraising, based on their backgrounds and career aspirations. M.A. students also complete approximately 400 hours of internship experience in arts organizations.

I teach *Managing the Arts Organization* and will use my course content to demonstrate how I address the AAAE standard in *Institutional Leadership and Management*. Part of the overview and rationale for the standard reads, "The arts enterprise is inherently collaborative; students need to understand concepts of leadership and group dynamics in order to understand how to adapt to the ever-changing environments in which they will work. The field demands the capacity for a breadth of leadership styles in a single leader..." (AAAE, pp. 12-13).

Although we use arts administration texts such as Byrnes (2008) or Korza, Brown, and Dreeszen (2007) in our programs, I choose other valuable books for this course, beginning with *Reframing Organizations: Artistry, Choice, and Leadership* by Bolman & Deal (2008). The authors surveyed organizational theory literature, grouping and presenting it through the perspective of four frames or approaches to managing organizations (Table 1):

Table 1 Bolman and Deal's (2008) four frames.

Name of Frame	Metaphor for Frame
Structural	Factory
Human Resource	Family
Political	Jungle
Symbolic	Temple

They explained their method: "We have worked to present a large, complex body of theory, research, and practice as clearly and simply as possible. We tried to avoid watering it down or presenting simplistic views of how to solve managerial problems. Our goal is to offer not solutions but powerful and provocative ways of thinking about opportunities and pitfalls. We...focus on both management and leadership" (p. viii).

The first sections of the book are organized frame by frame, enabling a discrete and in-depth look at each. The latter parts of the book address leadership and reframing, the ability to change from frame to frame to best suit any circumstances. Throughout the book, Bolman and Deal (2008) make ample use of real-life examples to help readers visualize the theories in practice and illustrate the power of reframing.

While reading Bolman and Deal (2008), students work collaboratively in small groups, using hypothetical arts-based scenarios they construct. As we focus on each frame, they apply the content to analyze the issues in their scenarios and propose

possible ways to address them. During the class session devoted to the Human Resource frame, I present an activity in work group dynamics. First students self-select into a group that best represents their style or approach to work. Then group members respond to the following questions:

- What are the strengths of our style? (4 adjectives, nouns, or phrases)
- What are the limitations of our style? (4 adjectives, nouns, or phrases)
- What style do we find the most difficult to work with and why?
- What do other people need to know about us so that we can work together more effectively?

Through reflection and discussion, students recognize that it's important to be able to work with and respect all types of people. This activity, along with the group work throughout Bolman and Deal, addresses the AAAE concern for collaboration and an understanding of group dynamics. The mid-term paper further enables students to apply the authors' conception of leadership through reframing.

In the second half of the course, students read additional books that offer other views of leadership to cultivate a "breadth of leadership styles" (AAAE). In *Good to Great: Why Some Companies Make the Leap...and Others Don't*, Collins and a group of graduate student researchers identified 11 enduringly great U.S. companies that sustained excellent results for at least 15 years. The team then tried to identify what made them successful. One factor they named was Level 5 leadership, characterized by a seemingly paradoxical combination of personal humility and professional will. Collins (2001) described these leaders as "a

study in duality: modest and willful, humble and fearless" (p. 22) and explained, "Level 5 leaders channel their ego needs away from themselves and into the larger goal of building a great company. It's not that Level 5 leaders have no ego or self-interest. Indeed, they are incredibly ambitious—but *their ambition is first and foremost for the institution, not themselves*" (p. 21).

Another book offers a more grassroots or bottom-up approach to leadership. Meyerson (2008) coined the term *tempered radical* in an earlier version of *Rocking the Boat: How to Effect Change without Making Trouble*. She studied how individuals could create change from within an organization while maintaining personal values and identities that may vary from the majority culture. The author commented that she wrote the book "for people who walk a fine line between challenging established norms and upholding them...These individuals want to succeed and fit in *and* they want to act on agendas, values, and identities that may threaten their path to success" (p. xii). (Examples of might include expanding insurance coverage to unmarried partners or promoting flexible working schedules to ease the burden on parents with young children.) Meyerson arrayed possible actions along a continuum from least visible or active to most:

- Resisting quietly and staying true to one's "self"
 - Turning personal threats into opportunities
 - Broadening the impact through negotiation
 - Leveraging small wins
 - Organizing collective action
- After completing course readings, students have an opportunity to apply what they've learned in a paper on leadership styles (Table 2). Options include:

- Find, document, and analyze a level 5 leader or a tempered radical
- Describe a hypothetical situation you might find yourself in as an arts administrator, and consider how you could function as a tempered radical
- Compare, contrast, and analyze two different conceptions of leadership, picking from course texts or other recent books on leadership

I contend that such training in arts administration better prepares individuals to work in the specialized world of non-profit arts organizations. To return to the earlier examples, arts administration coursework would have prepared Andrea for the myriad responsibilities—beyond curatorial functions—that are involved in running an art museum. And Carlos would have known that non-profits cannot be individually owned or controlled and must be recognized as charitable organizations to apply for public funding or receive tax-deductible donations. Those with arts administration training possess the knowledge and artistry to avoid many typical missteps, increasing the efficiency, performance, and sustainability of their arts organizations.

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Endnotes

- 1 “Non-profit” and “not-for-profit” can be used synonymously.
- 2 The Internal Revenue Service, or IRS, is the U.S. federal agency that collects taxes from individuals and businesses.
- 3 Until recently, the American Alliance of Museums was called the American Association of Museums.
- 4 The university also offers a Masters of Fine Arts degree in theatre management, through the School of Theatre, College of Visual Arts, Theatre and Dance, and a Masters of Art degree in arts administration in the College of Music. There is good cooperation among the programs.

Table 2 Leadership styles.

Source	Conception of Leadership
Bolman & Deal (2008)	Reframing – fluently choosing appropriate frames
Collins (2001, 2005)	Level-5 leader – blending personal humility and professional will
Meyerson (2008)	Tempered Radical – leading from within while maintaining identity and values

派特·維勒尼芙

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派特·維勒尼芙博士為美國佛羅里達州立大學 (Florida State University, USA) 藝術教育學院 (Department of Art Education) 藝術行政系所之教授兼系主任，其專業領域為博物館教育與展覽，並發展出一套以參觀者為中心的展覽理論 —— Supported Interpretation(SI)。

維勒尼芙博士於國內外發表過多篇研究論文、出版品，並曾擔任藝術顧問的工作，其中 2012-2013 學年的相關發表主要分布於巴貝多、中國、台灣、南韓及丹麥等地，而她同時也在發展上述 SI 理論期間策劃過多場展覽。

維勒尼芙教授為「Chicano Art for Our Millennium」一書之共同作者及「From Periphery to Center: Art Museum Education in the 21st Century」一書之編輯。曾任「Art Education Journal」之主編，現為「The International Journal of the Inclusive Museum」之副主編。

此外，她亦於佛羅里達州薩拉索塔市 (Sarasota) 的約翰與梅波潤格林藝術博物館 (John and Mable Ringling Museum of Art) 籌組了「Gallery Praxis」藝術博物館教育會議。2009 年，她被提名為「美國國家藝術博物館教育學家」。



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Pat VILLENEUVE, Ph.D., is professor and director of arts administration in the Department of Art Education, Florida State University, USA. She specializes in art museum education and exhibitions and has developed supported interpretation (SI), a model for visitor-centered exhibitions.

Dr. VILLENEUVE has published, presented, and consulted extensively in the United States and internationally, having presented her work in Barbados, China, Taiwan, South Korea, and Denmark during the 2012-2013 academic year. She has also curated exhibitions as part of her SI theory development.

Professor VILLENEUVE co-authored *Chicano Art for Our Millennium* and edited *From Periphery to Center: Art Museum Education in the 21st Century*. She is a past editor of the *Art Education* journal and is an associate editor of *The International Journal of the Inclusive Museum*.

Pat VILLENEUVE organized *Gallery Praxis*, an art museum education conference held at the John and Mable Ringling Museum of Art in Sarasota, Florida, USA. She was named the U.S. National Art Museum Educator in 2009.



學術論文發表

東亞藝術在倫敦 以中國當代藝術一級市場為主要關注

蕭雅文

倫敦蘇富比藝術學院當代藝術研究所

組別 學術論文場次 II / 藝術市場 - 量化與質化調查分析

摘要

本論文以在倫敦市場中，中國當代藝術一級市場為其主要關注，主要透過訪談與觀察，描繪市場現況與面臨的挑戰。第一章「倫敦當代藝術市場的發展」先就倫敦藝術市場的發展以及至 90 年代以來中國當代藝術一級市場在倫敦發展做一回顧性總覽。第二章「倫敦中國當代藝術一級市場的現況與個案訪談」中就倫敦中國當代藝術畫廊市場的現況做整體性描述，接著針對兩個當今主要畫廊 Michael Goedhuis Gallery 以及 Hua Gallery 進行專訪，以第一手資料了解其經營的現況與營運模式以及其與市場、藏家及代理藝術家間的關係。第三章「藝術博覽會」論及藝博會這個日漸活躍的平台，並以 Art13 這對亞洲當代藝術友善、且多數倫敦中國當代藝術畫廊皆有參與的藝博會為主要關注，並訪談其總監 Stephanie Dieckvoss 了解其設立與發展，以及亞洲藝術參與的狀況。第四章「現況中的問題與挑戰」專訪中國當代藝術學者、同時也是藝術顧問機構「中國當代藝術辦公室」(Office of Contemporary Chinese Art) 總監的 Dr. Katie Hill 談論其對倫敦中國藝術市場的觀察，並就本研究發掘倫敦中國當代藝術一級市場現況中所面臨的問題與挑戰提出討論。

第一章 倫敦當代藝術市場的發展

倫敦現今為歐洲第一大、西方第二大的藝術市場。根據藝術市場研究機構 Artprice 所公佈的數據，以西

方拍賣市場整體來看，2012 年英國占了總交易額的 30% (其中 99% 位於倫敦)，大幅領先法國 (7%)、德國 (3%)、瑞士 (2%)、義大利 (1%) 等其他歐洲國家¹。雖然仍落後美國的 47% (紐約占其中 95%)，但因其經濟力強、國際包容力為歐洲之最，除了間接擁有全歐洲為其腹地，世界其餘各地的知名畫廊、經紀商在近年內也都紛紛湧至倫敦設點；再加上該城市的藝術收藏文化已有相當長的發展歷史，擁有大量專業的藏家，各國的新興財富階層亦聚集在這金融之都，所以在歐洲、乃至全球藝術市場具有相當的領導地位。並且，相較於其他藝術中心，倫敦市場在創新突破上一直有亮眼的表現，特別是在當代藝術領域。倫敦當代藝術市場崛起於 90 年代，之後迅速成為全球性的重要據點，其經濟力、國際包容力強，對於來自不同文化背景、創作理念及媒材的作品接納度高，並且能成功在市場上推廣這些藝術家，其多元化少見於歐洲其他城市。同時，其本土當代藝術家像是達米恩·赫斯特 (Damien Hirst) 及班克斯 (Banksy)，如同中國的艾未未、日本的草間彌生、村上龍、美國的傑夫·昆斯 (Jeff Koons) 般，儼然成為全球性的大品牌。倫敦在當代藝術市場的各個面向皆高度發展。

做為一個具有相當歷史的藝術市場，倫敦早在 17 世紀便擁有經濟實力與鑑賞力兼具的藏家，當中包括當時的英王查理一世；18 世紀中葉，現今世界上兩大拍賣公司蘇富比 (1744) 與佳士得 (1766) 先後成立於倫敦，英國最高的藝術殿堂「皇家藝術學院」(Royal Academy of Art, 1768) 也成立於同時期，為藝術市場帶來相當的影響。19 世紀維多利亞時代是

藝術的盛世，創作蓬勃、藏家倍增，「藝術經紀商」（art dealer）的崛起更是帶動作品價格的上升。20世紀，二次大戰爆發，歐洲市場停擺，許多藝術家轉往美國紐約發展；戰後1960至1970年間，兩大拍賣公司蘇富比與佳士得迅速發展成為國際化的公司。1980至1990初期，藝術市場再見蓬勃生機，投入的資金愈增，在印象派及後印象派的品項上尤為明顯²。90年代，當代藝術市場更見另一波高峰的，最重要的事件莫過於廣告鉅商查理斯·薩奇（Charles Saatchi）買下一批金匠藝術學院（Goldsmith University of London）畢業生的作品，捧紅日後稱為「英國年青藝術家派」（Young British Artists，簡稱YBAs）的赫斯特及翠西·艾敏（Tracey Emin）等人；緊接著，泰德當代美術館（Tate Modern）於2000年成立，更奠定了英國當代藝術的發展。

中國當代藝術於90年代初始見於西方藝術世界；1993年，中國藝術家初次登上威尼斯雙年展這當代藝術界的國際大舞台，經過了90年代屢屢參展的推廣，讓中國當代藝術在西方的能見度與肯定大為提升³。80年代末期至90年代期間，現任香港漢雅軒畫廊策展總監張頌仁（Johnson Chang）開始在國際間策畫多檔以中國當代藝術為題的展覽，其中包括《後89：中國新藝術》於澳洲、美國、加拿大的巡迴展，以及1994及1996年聖保羅雙年展中的中國特展等等，對於西方藝術界對中國當代藝術的認識大有貢獻。在英國，當時有少數幾個藝術機構、畫廊代理、展出了第一批受到國際注目的中國當代藝術家，像是1993年在牛津現代美術館（Museum of Modern Art,

Oxford，現Modern Art Oxford）舉辦的《中國前衛藝術》（China Avant-Garde: Counter-Currents in Art and Culture）巡迴展囊括了艾未未、蔡國強、劉小東、徐冰、劉焯等人的作品⁴，同年，老字牌的倫敦瑪勃洛畫廊（Marlborough Fine Art）舉辦了《中國新藝術展》（New Art From China），展出了王廣義、曾梵志、方力均等的作品。透過這些早期的特展，在英國的特定藏家開始對中國當代藝術的感到有興趣。

二十一世紀初，中國大陸的當代藝術市場開始發展。2002年，中國藝術特區設立，同時拍賣市場逐漸成形；相較於90年代，中國的當代藝術市場瞬間成長許多，各層級的交易形式透過各式不同的管道包括私人畫廊、拍賣或是藝術家自身經營的工作室直接銷售作品等，以各種模式進入市場，形態是多元而複雜的。中國的情勢影響著其於西方市場的發展。在倫敦開始有專職於中國當代藝術的畫廊、經紀商出現，由Julia Colman及Ludovic Bois於1996年成立的Chinese Contemporary便是最早期的代表，為岳敏君、王勁松、楊少斌等人舉辦過個展，並為張曉剛在歐洲幾檔美術館個展擔任策展⁵。於2005年成立的Olyvia Fine Art則為另一個先鋒，同一時期另有機構性的紅庵基金會（Red Mansion Foundation）成立，做為在倫敦推廣中國當代藝術、中英交流的平台⁶。然而，這些少數早期在倫敦專營中國當代藝術的經紀商、推廣機構都不甚成功，Chinese Contemporary在幾年後重心逐漸轉移、離開了倫敦，紅庵基金會亦停止運作，而Olyvia Fine Art雖至今日仍有代理部分中國當代作品，但重心已轉為經營西方當代藝

術⁷。對於早期專營中國當代藝術的畫廊 / 經紀商皆無法成功繼續營運的原因，中國當代藝術學者、同時也是藝術顧問機構「中國當代藝術辦公室」(Office of Contemporary Chinese Art) 總監的 Dr. Katie Hill 在訪談中表示：(Katie Hill, 電話訪談, 2013年9月16日) 倫敦市場對於中國的態度非常保守，對於“新中國”的情勢並不信任。實際運作上，中國藝術市場的專業性不足、變動大，從法規、稅制乃至文化習俗差異，對於西方畫廊 / 經紀商都有太多難以克服的困難，除非他們有對於中國非常了解的專家，否則合作上難度很高。過去這些畫廊可能是在銷售上沒有成功命中目標客群，再加上在倫敦市中心要經營一個畫廊空間成本高，使得風險更加提升。但主要原因仍是因為和中國打交道上有太多潛規則存在，使得大部分的人都不甚熱衷。

第二章 倫敦中國當代藝術一級市場的現況與個案訪談

第一節 倫敦中國當代藝術一級市場的現況

目前活躍於倫敦市場的中國當代藝術畫廊 / 經紀商約有3至5家。如前所述，早期的經營者不是退場就是轉換跑道，而近年又有新的經營者投入市場，或是原有專營亞洲古董買賣的經紀商開始經營中國當代藝術，因此雖數目上與十年前相近，但實際上的人員已經過一翻洗牌。1980年代以經營亞洲古物起家的 Michael Goedhuis 是倫敦極少數幾位長期專業於中國藝術的經紀商，他多年來專研於中國當代水墨這

個先前被未受到太多重視、但近年來在市場上日漸出色的領域；Hua Gallery 開幕於2011年，是倫敦目前少數擁有畫廊空間且唯一一個專門經營中國當代藝術的畫廊；Hai Gallery 在規模上小很多，多代理新興、第二線的藝術家。另有現已轉向經營西方當代藝術的 Olyvia Fine Art，仍代理少量但第一線的中國當代藝術家作品，以及亦從經營亞洲古董起家的 Rossi and Rossi，於2007年起曾一度對中國當代藝術關注，一連辦了多檔包括中國當代攝影的相關展覽，但後期轉而專攻西藏藝術，並未以中國當代藝術為其主軸。

除了這些對於中國當代藝術具專業的畫廊 / 經紀商，另有一些畫廊僅在其代理中囊括少數幾位中國當代藝術家的作品。這種經營形態中對市場影響力及效力較大的便是世界級第一線的大畫廊代理第一線的中國當代藝術家。這些大畫廊在知名的藝術家找尋可以合作的對象，對其個別經營，像是白立方 (White Cube) 在其代理約五十位的國際級藝術家其中包括了劉煒與張洵；高古軒 (Gagosian) 代理超過百位的藝術家列表中僅有一位中國藝術家曾梵志，其在2012年在倫敦辦過個展；在 Hauser & Wirth 代理的五十多位中有張恩利。另外，在倫敦深具名譽與影響力的 Lisson Gallery 代理了艾未未，並即將舉辦劉小東第一檔的英國個展。在這些第一線畫廊中，僅有佩斯 (Pace Gallery) 因為擁有在北京經營的經驗，也因此代理較多位的中國當代藝術家，但曾在倫敦展出的僅為其中少數幾位。這些國際級的大畫廊，雖不見得擁有對中國當代藝術的專業，但因其位於市場的最高端，資金流量大、購買力強，並且與國際市場可以很

有效的連結，在當代藝術市場有很大的影響力，其經營中國當代藝術家的模式也與專營的畫廊具有相當大的差異。

第二節 Michael Goedhuis Gallery 專訪

創立者 Michael Goedhuis 於 1980 年代以經營亞洲古物起家，2000 年初轉戰紐約開始為投資公司收購中國當代藝術作品，歷經了三年匯集了目前多位第一線中國當代藝術家包括艾未未、張曉剛、劉小東等總數 200 件的作品，建構了 Estella Collection，為當時堪稱最大量、最重要的西方中國當代藝術收藏家辦了兩檔展覽⁸，並於 2008 年在蘇富比拍賣中全數售出，為之譁然。之後他將重心轉回倫敦，並逐步開始專注在中國當代水墨的領域。（Michael Goedhuis，面談，2013 年 9 月 10 日）

Michael Goedhuis Gallery 在經營中國當代藝術的經歷，以及其目前的主要關注

2004 年，中國當代藝術開始活躍，我開始收購各類型的中國當代藝術，包括張曉剛、方力鈞等的作品。當時我在紐約為幾個藝術投資者成立的藝術投資公司代理購買，花了 2004 至 2007 三年的時間匯集而成了 Estella Collection，接著為了這個大規模的收藏辦了兩檔展覽、出版了一本書，最終於 2007 年以總價 2500 萬美元將此當初僅用 500 萬美金成本收購的收藏賣出。2010 年，我回到英國繼續中國當代藝術的經營。

我從九零年代初期開始接觸中國當代藝術，當時西

方對於這領域的興致尚低。對我來說，有機會去經營一個在經濟上、知識上都仍未被開發，但有其潛力的領域是有趣的，這也是我過去一直在做的。中國當代藝術，尤其是中國當代水墨之所以讓我感興趣在於，我認為中國正在經歷第二次的文化大革命，這趨勢反應在很多領域的發展上，像是音樂、電影、設計以及建築，哲學上有新孔學的興盛，當然也包括藝術界的變化，這與中國急速發展與其正在重拾民族、文化自信心相關。以我自己的觀察，中國是唯一一個在歷史上經歷文明再現的獨特案例，這反應在現今中國以及香港、台灣的當代社會文化發展中。而當代水墨在藝術表現上直接連結中華文明，是中華文明的當代解讀。

歐洲、美國及亞洲的不同的市場是否有地域性的差異？

我們目前在北京有個經紀人，在紐約有個小辦公室。歐洲藏家是最先開始收購中國當代藝術的，其中有許多頂端藏家像是瑞士的烏利·希克 (Uni Sigg) 及比利時的尤倫斯夫婦 (Baron Guy and Myriam Ullens)。然後是以紐約為中心的美國市場；現在亞洲市場很快的增擴。我們在新加坡也有幾個客戶，是熟知這領域的華人，在香港與台灣也有些新興藏家；也有客戶在美國以及倫敦。我個人並不覺得這些藏家間在品味上有太大的差異，比較明顯的差異在於中國古物與當代藝術的藏家之間。倒是在中國市場，因投機成分高，很難去定義客戶的品味和屬性。值得一提的是因為當代水墨市場看漲，所以很突然的有個台灣客戶現正很積極地在收購新關作品。

與拍賣行或其他畫廊 / 經紀商的合作？

我們偶爾在拍賣上購買，但不賣給拍賣行。拍賣行在市場上是極有力的角色。以當代水墨概括而言，進入拍賣的作品其實品質不高，價格也很低，並不同於19世紀現代水墨的情況，所以我們通常也不太會買。但因過去我跟蘇富比有許多合作，所以也一直維持工作上的流通，跟保利和嘉德也都保持聯繫。他們現在也都開始經營當代水墨，佳士得有請我幫忙其第一檔在上海的展覽，保利跟我在當代水墨這塊也有些合作。我們剛開始嘗試與拍賣行合作，但我並不想透過拍賣行銷售，因為透過我自己的顧客群可以賣得比較好，也不想把少數的好作品給拍賣行。

至於其它的畫廊 / 經紀商我很少有合作，這是我的風格，我喜歡自己行事。大部分我們代理的藝術家與其他經紀商的也沒有太多聯繫，就算有我也盡可能控制，因為在專業上，我希望其價格是穩定的。但這狀況有可能需要改變，比方說 開始有其他有能力的經紀商出現，尤其是在亞洲，也許可以配合經營不同地域。

Michael Goedhuis Gallery 參與藝博會的經驗

我們每年參與8至9個藝博會，地點遍及亞洲的香港和新加坡（但尚未參與過中國及台灣的藝博會）、美國的紐約和邁阿密以及歐洲的荷蘭、巴黎及倫敦，主要目的是推廣、銷售以及發展顧客群。策略上，我們盡力呈現當今在中國當代水墨第一線藝術家的作品；

這些作品為數不多，我們盡力從藝術家身上得到最好的作品以刺激、發展市場。同時，我們書寫專文介紹、出版畫冊，盡力推廣這個領域。我們在當代水墨耕耘了很多年，現在市場上總算開始發酵。

至於藝博會的選擇，亞洲的部分，參與「典亞藝博」(Fine art Asia) 是因為我仍有部分經營中國骨董；「新加坡藝博會」(Art Stage Singapore) 我現在沒有參加了。當初是參與是為了開發新加坡的客戶及觀眾，我對新加坡感到驚艷，有許多很不錯的潛力客戶來自新加坡、馬來西亞及印尼的華人及印度人，其中不少是有想法的年輕藏家。但對於新加坡藝博會的經營風格感到不甚適合，加以其走向漸著重於東南亞藝術，這部分我自己沒有這麼大的興趣。倫敦的部分，選擇參與 Masterpiece London 也是因為我們部分的骨董經銷；Art13 則是個新鮮有活力的新平台。我認為 Frieze Master 也會是個很好的選擇，只是其限制無法展出當代的作品。另外，今年11月倫敦「亞洲週」我們會辦一檔當代水墨展。在倫敦的藝博會的狀況結果時好時壞，但我認為倫敦是為目前全球最有發展的一個藝術中心，各國的富人皆匯聚於此。

是否有考慮在倫敦經營實體的畫廊空間？

我們在紐約曾有過畫廊，但在倫敦不曾有過，一方面是因為過去幾年我專精於當代水墨的領域，多為私人交易，所以覺得沒有開設畫廊的必要性，不需要這樣的開銷。另一方面我們參與大量藝博會，很密集、豐富，不間斷地運作做呈現。現在很多經紀人都不傾

向開畫廊，因為大家不再那麼頻繁進畫廊。

客戶群的背景及購買模式

客戶群不斷地在變動。可以確定的是，今日與 30 年前不同，人們購買藝品很看重其投資潛力，這就是現況，每位買家或多或少都在這麼做。在中國，80% 的購買皆為投機，是個不成熟、不穩定、初階、焦躁的一個市場；香港、台灣及新加坡的市場亦有投機成分，但少很多，較多真正的收藏。美國與歐洲的買家狀況相似，有程度上足夠的知識了解，但亦有投機成分，這是當今不管在哪個領域的商業藝術普遍的狀況。至於我自己的客戶群，其中有少數非常成熟、具專業知識的美國和歐洲藏家，他們在為自己的收藏購買；另外有些客戶買好作品，隔幾年買一件，但並非認真在收藏。另外，尤其在當代水墨這塊，愈來愈多客戶認為是一個可以購買與收藏的領域，百萬美金就可以買到 20 至 40 件世界級的作品。這方面近期有一些買方是美術館，像是大英博物館就跟我們購買了不少作品，牛津艾許莫林博物館（Ashmolean Museum）也有買一些，另外美國大都會博物館及波士頓美術館（Museum of Fine Art Boston）也都是我的客戶。

與藝術家合作的狀況與模式

在西方，經紀商通常與其藝術家有很緊密的合約，在大部分的狀況下是為了藝術家著想，但與中國藝術家合作，合約的效用不大，彼此在誠信的認知上時有落差。這也是為什麼我現在盡可能少處理攝影作品，

因為有版數的問題，會使得誠信問題更難處理。在香港和台灣的狀況好一些。所以我們是有合約，但效用不大。目前在中國，藝術家對於其與經紀商的合作的態度是鬆散隨意的，他們很常私底下買賣，有些藝術家甚至要求我把作品寄回去給他們，因為他們在中國直接銷售可以賣到更好的價位，這對我們來說是沒有面對過的處境，也是我們必須面對的挑戰之一。

我們推廣、行銷藝術家的方式，除了辦展覽、參與藝博會，另外我們做很多出版品，包括畫冊、宣傳品以及網站資訊。展覽的頻率每年 2 至 4 檔。像是兩年前，我們在倫敦辦了一場大型的劉國松個展，之後便賣了幾件他的作品給大英博物館。通常我會透過其他藝術家去接觸我有興趣的藝術家；以前我會去中央美院的畢業展，但其實優秀、可達國際水準的藝術家並不多，要找出有潛力的藝術家是困難的。

挑戰與期望

第一線國際大畫廊開始代理知名中國藝術家，這對我們來說是個威脅。當某些藝術家變得在市場上知名度高、很有力，他們開始不想跟僅經營中國藝術的經紀商合作，而是想跟經營美國、西方藝術的經紀商合作。但同時，這些大畫廊對中國藝術家的興致不大，不管他們的表現再出色，當然，有些像是艾未未的例外。紐約大都會博物館於今年底將會舉辦當代水墨的大型展覽，許多我們代理的藝術家將會參展，很值得注目。

第三節 Hua Gallery 專訪

(畫廊經理 Dagmar Carnevale Lavezzoli, 面談, 2013年9月13日)

Hua Gallery 的成立以及關注

Hua Gallery 於 2011 年由霍尚欣 (Shanyan Koder) 成立並擔任總監。她是香港人, 大部分的時間在香港, 但經常往返香港、倫敦之間。她想設立一個讓中國藝術家發聲的平台, 於是成立了 Hua Gallery, 一開始展出的多半是新興藝術家, 之後亦開始代理成名藝術家, 像是高氏兄弟、盛奇、徐勇等。她的期望是可以呈現中國當代藝術的多種面貌, 所以在作品的選擇上我們盡可能囊括多種媒材與形式, 包括攝影、繪畫、雕塑、裝置等, 希望呈現給觀眾多種中國當代藝術的範疇。在作品的主題與關懷上我們也盡可能多元, 有政治的、概念的、抽象的, 有的只是單純的詩意和美感。

我擔任 Hua Gallery 的畫廊經理至今一年半。我在羅馬大學學習中國歷史文化與語言, 之後兩年至北京 798 藝術特區工作, 現在畫廊合作的多位藝術家包括高氏兄弟、徐勇等, 都是我當初在北京時幾乎是每天一起工作的藝術家。之後我在倫敦大學亞非學院取得中國當代藝術碩士學位後便到了畫畫廊工作。

對於倫敦的中國當代藝術市場的看法

我覺得狀況很好。一級市場中有幾個畫廊在經營中國當代藝術, 另外就是藝博會, 尤其是 Art13 中, 中

國當代藝術有相當的比重。至於二級市場, 拍賣市場也都有不錯的表現, 像是今年六月底蘇富比當代藝術專拍中有好幾件中國當代藝品拍出好價格; 不久前的 Dreweatts and Bloomsbury Auctions 中一些中國當代年輕藝術家的作品亦拍出了總價優異的好價格。總體而言, 中國當代藝術市場在倫敦很年輕, 約從 2006 年開始發展, 這幾年上上下下, 2008 至 2012 年間較低落, 當中有許多不同的因素, 包括全球的經濟不景氣, 但我認為它會一直成長, 我相當樂觀。

選擇藝術家與作品的策略與思考

我們考慮的面向有很多, 首先是作品的訊息是要可以溝通的, 傳達的概念也要是我們可以認同的。另外, 形式也很重要, 也是訊息傳達很重要的一環; 當作品的訊息跟形式可以相互配合, 那通常就會是我們要的作品。以一個商業畫廊而言, 我們當然也必須考量作品的銷售潛力。當然最終有些作品賣得很好, 有些較差, 但重要的是我們可以從作品中組織出一個有力的訊息以及美學語言, 這是我們認為其銷售潛力所在。

作品中, 反應中國情勢與使用國際語境兩者都很重要, 像是高氏兄弟的作品, 對於中國政治社會情勢有很強的批判, 但其作品可以延伸至全球性的社會狀況及人類生活, 他們的訊息在不同文化脈絡下都可以被理解與解讀。現在正在展出的韓冰的作品亦然, 主題雖為中國情勢與環境汙染, 帶有很強的政治社會批判, 但這其實是個全球性的議題。同時, 其作品又深具原創美學語言。整體而言, 我很喜歡中國當代藝術

的原因是，藝術像是面現實的鏡子，透過藝術了解中國社會、地下的情勢，且藝術有其特定的語境，使其可以在更多狀況被理解且欣賞

形式上，攝影整體而言在市場上愈來愈受到認可與讚賞；我們有徐勇的黑白胡同系列，美感之外有很強的社會意涵。我們代理的繪畫作品也很多，像是盛奇主要使用壓克力和畫布。我們盡可能囊括多種形式與媒材，包括裝置及雕塑。以銷售而言，繪畫因為沒有版數問題，是獨一無二的，較受買家青睞。所以如果是繪畫作品，我們在銷售上比較有把握，像是盛奇去年的展覽，在展前作品就全數售罄。攝影作品如果本身品質夠好，也賣得很好。

除了透過我個人關係認識的藝術家，我也會留意、追蹤其他藝術家的表現，去發掘有發展潛力的合作對象，然後試著找出好的方式跟他聯繫，有時候是透過其他藝術家或經紀商。

與藝術家合作的方式以及行銷模式

處理每個藝術家的作品，我們會舉辦為期數個月的展覽，之後我們將作品保留一年，讓作品有更多銷售的機會。這段時間作品是由畫廊獨家代理；這對畫廊和藝術家來說都是好的。有些藝術家，在展覽前我們就會先買部分的作品，其餘的狀況則是直接售予客戶，淨收五五分攤。

在每檔展覽前我們都會出版畫冊。畫冊是非常重要的；展前我們會將其寄給客戶，引起他們對作品的好奇心，並先對作品有些了解。常常在展前我們就已售出部分的作品。我們也會在展前寫信給我們的客戶，介紹藝術家及作品。這些對展覽的銷售都很有幫助。我們也善加利用網路社交平台，像是 facebook、twitter 及微博。這些平台很有力地散佈畫廊的訊息。另外，我們有與公關公司合作，協助我們聯繫平面及網路媒體，增加露出。像是今年一月份高氏兄弟的展覽就受到不少媒體關注，BBC 及 Timeout 等媒體都有來採訪。

與其他單位，像是拍賣行或是其他畫廊的合作

目前我們有跟另一個在佛羅倫斯的畫廊 Aria Art Gallery 合作，合作的方式是我們將兩位我們的藝術家帶過去展出，明年三月他們帶一位他們的藝術家來辦展。這對兩個畫廊來說都是很好的，因為我們有機會在另一個市場推廣我們的畫廊及藝術家，有機會接觸新觀眾與客戶；佛羅倫斯對中國當代藝術不甚熟悉，是一個待開發的市場。Aria Art Gallery 並非專營中國當代藝術的畫廊，但他們代理了一位藝術家莊紅藝，兩年前在他們畫廊展出，明年則會在我們這辦展。靠近佛羅倫斯有個城市叫 Plato，擁有很大的中國族群，我們也希望能吸引到這裡的觀眾。

另外，我們最近跟倫敦 Mayfair 的一個大型博奕中心 playboy club 合作。他們每幾個月會辦一檔展，我

們將在那舉辦盛奇的個展。盛奇是我們畫廊最傑出的藝術家之一，並且在市場上有非常好的回應，所以我們希望讓他的作品透過不同的管道有更多展出機會。在這個案子上我們是與一藝術顧問公司合作，我們提供作品，她負責銷售，我們對她很信任，所以對我們來說是一個將作品帶出畫廊展出的好機會。

至於拍賣行，我們與特定專員有保持聯繫，並且與相關人士也有良好關係，但目前為止並沒有實質的合作。

參與藝博會的經驗

藝博會對於畫廊、經紀商、買家來說都是非常好的平台，能在一個屋簷下看到各類的作品，是一個很特別的場合。Art13 是我們第一次參與的藝博會，很多人喜歡我們的作品，詢問度高也賣得很好，對我們來說是很滿意的經驗，我們也會繼續參與明年的 Art14。

作品的價格範圍以及客戶群的背景

作品的價位很廣，畫廊現有的約 1,000 至 60,000 英鎊（美金），但若是包括我們所代理的所有作品，價格可以非常高。我們的客戶群中，各類的買家都有。有些有比較強的投資目的，所以他們會做很多投資上、資金使用方式的評估，並且評估藝術家市場價值的走向。也有些客戶購買是為建立自己的收藏。其中有很成熟的藏家，不只是收藏當代中國藝術；亦有年輕買

家，剛開始摸索自己的品味。我們有不少香港客戶，因為我們總監人在香港，另外還有來自倫敦、巴黎、義大利和美國的客戶。

繪畫普遍較受青睞，攝影接受度也很高，像是徐勇的黑白胡同系列就很受歡迎。大體而言，藏家都有一定程度的文化水準，所以就算是西方藏家，對於像是胡同這樣的中國內涵，就算沒有很深的認識也都有些了解，很感興趣也喜歡，所以這一系列賣得非常好。至於中國藏家，相較於攝影，比較傾向購買繪畫，這與中國傳統觀念中並未認定攝影的藝術價值，認為攝影僅是重現現實有關。所以他們傾向獨一無二的繪畫作品，但漸漸也有中國藏家開始欣賞攝影作品。

客戶群中，有一些是我們總監的老客戶。新客戶中，有一個美國藏家是看到我們網站上的幾個特定作品圖片而開始對我們感興趣，然後特別來畫廊看作品，最終也買了幾件。有幾個年輕藏家會前來諮詢如何建立自己的收藏；他們會定期過來看看，如果有看到喜歡的作品就會下手，我們也會在展前寫信給他們，這對他們而言的效果很好。

專營中國當代藝術畫廊與一般畫廊代理中國藝術家在策略上的差異？

我們是全然專注在這個領域，對於中國當代藝術很專業。這樣的熟悉度讓我們比較容易推廣我們的作品，我們的客戶中也有一些專門收藏中國當代作品。

第三章 藝術博覽會

第一節 倫敦藝博會現況

藝博會是個建立「網絡」(network)的場合，買家與經紀商藉此時瀏覽藝品、與畫廊、藝術家交流，長期經營的藝博會更成了維持這些關係的重要平台。畫廊、藝術家在此經營穩定支持的買家，而買家則得以在藝博會逐步建立屬於自己的收藏。根據 Artnet 的統計，2012 年在藝博會成交的金額占全球藝術經紀交易的 31%，由此可見藝博會在全球藝術市場的重要性與日俱增。另一方面，藝博會的出現也改變了畫廊原本的經營和銷售的模式。參與國際性的藝博會讓原本市場僅限所在地域的畫廊有機會把自己的業務拓展至國際，不少畫廊更是增設專門負責每年參展各藝博會的專員、甚至部門，用心經營自己的「藝博會品牌」。雖有些評論家認為大型藝博會如同「慶典」，在熱鬧喧嘩的氛圍中，炒作出的氣勢往往蓋過作品真正的品質，成為一個金錢比學術品質說話大聲的場合，使得藝術過於「商品化」(commodification)。然而，亦有相反意見認為藝博會促進藝術的「民主化」(democratisation)，在藝博會中，更多對藝品有興趣且具資本實力的人們得以第一手接觸藝品，為整個畫廊界帶來更多的新興買家。

倫敦的各大藝博會中，歷史最悠久的是創立於 1988 年的「倫敦藝博會」(London Art Fair) 以及「英國藝博會」(20/21 British Art Fair)，前者專注於為英國本土的畫廊建立交流的平台，後者更是堅守正統，僅展出英國現當代藝品；兩者皆以英國本地藝術及市場為主要考量，因此與中國當代藝術相關度低。創

辦於 2003 年的斐列茲藝博會 (Frieze Art Fair) 無疑是倫敦藝博會中最受矚目的國際盛事。以當代藝術雜誌 frieze Magazine 為其根基，如今每年都有約 170 家的畫廊參展，超過 60,000 名的參觀人次。自 2012 年起，更於會期間增設全新的斐列茲大師藝博會 (Frieze Master)，為二十世紀之前的藝品開設了新市場。然而整體而言，斐列茲藝博會仍是一個以歐美為主體的藝博會，每年僅有少數的亞洲畫廊參展，其中中國北京的長征藝術空間及廣州的維他命藝術空間近年年年參展，幾乎已成固定班底，為中國當代藝術的代表畫廊。另外，偶見第一線大畫廊如白立方、高古軒、佩斯、Hauser & Wirth 等展出其所代理的知名中國藝術家。

近期，又見另一大型藝博會成立。由成功打造香港藝博會 (Art HK) 的 Art Fairs London Ltd 團隊全新創立的 Art13，於 2013 年春季，挾花旗銀行 (Citi Private Bank) 的領先贊助，在西倫敦的奧林匹亞大廳 (Olympia Grand Hall) 為倫敦藝術市場開出一個新局。創始人 Tim Etchells 及 Sandy Angus 以於歐洲設立一個真正全球性的藝博會 (Europe's first truly global art fair) 為目標，並由曾擔任斐列茲藝博會經理、香港藝博會總監 (Joint Fair Director)、倫敦蛇形畫廊 (Serpentine Gallery) 策展人的 Stephanie Dieckvoss 擔任藝博會總監，第一屆 Art13 便有 129 家、來自 30 國的畫廊參展。雖仍有約 40% 的參展畫廊來自歐美，比例上與斐列茲藝博會相似，但卻驚見有近 20 家來自東亞的畫廊，包括北京的 aya gallery、博而勵畫廊、Pifo Gallery，香港的 Amelia Johnson Contemporary、Pearl Lam Gallery、世界畫廊，以

及上海的 Vanguard Gallery 等，數目之多為歐洲藝博會中少見。另外，在倫敦當地的亞洲藝術畫廊也多有參展，包括經營中國當代藝術的 Michael Goedhuis Gallery、Hua Gallery 以及 Rossi & Rossi⁹，足見其亞洲經驗的強連結以及企圖將不同地域的藝術帶入倫敦市場的決心。而本研究中受訪的畫廊皆表示他們對 Art13 的結果（銷售以及客戶拓展）很滿意，明年也將繼續參加 Art14，Art13/14 是否能持續成為中國當代藝術在倫敦市場發展的穩定平台值得後續觀察。

第二節 Art13 藝博會總監 Stephanie Dieckvoss 專訪

[Art13 藝博會總監 Stephanie Dieckvoss，信件訪談，2013 年 6 月 17 日]

對於過去幾十年藝博會的數目劇增的「藝博會現象」(art fair phenomenon)，您的看法是？能否請您簡述 Art13 的創立，以及 Art13 在倫敦 / 全球藝術市場的定位？如何將 Art13 與其他倫敦重要藝博會做出區別？

藝博會的出現反映了藝術市場的變化，不僅是買賣作品的方式，更是關於作品如何被觀看與解讀。許多原因造成藝博會成為現今最重要藝術商業平台（同時也帶有展覽性）；其在一便利的地點同時匯集了多樣的作品，這是在一般畫廊展覽無法見到的。因此，藝博會成了讓畫廊、藏家、策展人、藝評交會的舞台。對許多畫廊來說，藝博會是其收入很重要的來源；沒有藝博會，它們在銷售上將面臨困境，亦無法將其代理的藝術家推向國際市場。在了解此結構性的轉變之下，我們認為倫敦做為一個全球最國際化的藝術中

心，有著發展全新全球性藝博會的潛力。Art13 是由兩位成功創立香港藝博會、具有亞洲市場經驗的創始人所設立，並由我所帶領，我們從開頭便設定將焦點放在未被呈現、非西方、全球性的藝術，將其帶入倫敦與西方市場產生對話。Art13 的獨特之處（至少在歐洲）在於其試圖將“新興地域”的藝術介紹給西方的觀眾。許多藝博會都僅有 1 至 2 家來自這些地域的畫廊參展，並無法呈現該地域藝術發展的全貌；Art13 便是想更全面性地呈現來自這些地域的作品。第一屆 Art13 在這點上已得到相當的成功。正如我所言，Art13/Art14 的定位是獨特的一呈現一個真正全球性的觀點—Art13 中 70% 的藝術家之前未曾在倫敦展出過，而其參與的觀眾也一樣來自全球各地，在一個友善且規模可掌握的環境中，“清新”(refreshing) 的呈現促成了其畫廊與藏家雙贏的局面。

與倫敦其它重要的藝博會比起來，在 Art13 中有更多來自亞洲的參展商，這是否與 Art13 團隊與亞洲（之前的香港博覽會）有著較強的連結有關？這是否亦為 Art13 招商上的策略？整體而言，哪些是 Art13 篩選參展畫廊的主要條件？

是的，香港經驗的確對 Art13 的發展非常重要；一方面我們從香港藝博會得到許多經驗，另一方面，我個人從中接觸到了許多我之前不熟悉但卻相當迷人且讓人興奮的藝術，值得在西方被更加重視，這些經驗形塑了 Art13 的走向。對於第一屆 Art13 受到許多亞洲畫廊的支持我們相當開心。至於畫廊的篩選則是由多位策展人所組成的委員會來執行，篩選的標準全然取決於各畫廊所提出的申請書，考量的包括其展出概念、藝術家的品質以及視覺的多樣性。目前我們並未

做出在參展國家、地域上的明確比例分配，但也許未來會考慮將其納入規範。

以銷售狀況而言，亞洲藝術的表現如何？整體而言，Art13 在銷售面上的成績如何？

亞洲藝術表現相當出色，多數的畫廊不僅只是賣得好、遇見了新客戶，同時也與策展人、美術館負責人以及其他畫廊建立了連結，開拓了其藝術家的展出機會。這情形在成熟與新興的畫廊上都能看到。整體而言，藏家帶著發掘新藝術的心態而來，對新作品態度極為開放。整體銷售強勁且價格、媒材、形式接受度廣泛。當然，不是每一家第一年都能有好的表現，但有約 80-90% 的參展商表示明年願意再回來參與 Art14。

第四章 現況中的問題與挑戰

第一節 文化歷史與人為制度的影響

「倫敦的中國藝術市場是相對小型的利基市場，而且是零碎的、安靜的」(Katie Hill, 電話訪談, 2013 年 9 月 16 日)。英國的中國當代藝術學者 Katie Hill 在訪談中提到了中國當代藝術在倫敦市場發展所面臨的問題，包括在高度競爭的環境中，因作品品質不穩定而得不到青睞：

倫敦國際當代藝術市場高度發展，水準很高，再加上英國文化、學術批判影響很深，論品質與獨特性，中國當代藝術在其中並不特別出色，無法脫身而出得到足夠的興趣和關注，在市場上占有重要的位置。倫

敦市場在態度上對於中國當代藝術有些模糊地遲疑，並未覺得非要重視不可。倫敦的當代藝術市場是個國際競爭的舞台，不特別有區域性的偏好，而是在國際藝術的總體概括之下相互競爭，在這高度競爭的環境裡，很難以少數的力量去驅使市場的喜好。

另外，從文化歷史的發展脈絡看來，相較於其他地域，中國當代藝術在倫敦市場的發展並沒有先天上的優勢：

倫敦的當代藝術市場則對於中國有些不情願，這亦與在地族群上的比例有關，例如倫敦有大量的南亞移民，其文化已融入當地。中國與英國的連結是相對薄弱的。

雖歷史上有些中國藝術家在英國發展，又像是 20 世紀早期中國移民移居東倫敦，但其與文化經驗較相關，與市場的連結並不強，與英國與中國現今的關係的連結亦不強。中國在倫敦的族群相對並不大，雖然陸續有許多群體活動發生，但卻沒有串連成一個潮流趨勢。

再者，以全球性的市場發展來看，人為的制度性因素也影響著區域性的發展，尤其是在當代藝術這個相對封閉、又與其文化、學術發展高度相關的產業，專業人士的地域性分佈是為中國當代藝術是否能在一個市場發展的關鍵因素：

中國當代藝術在倫敦市場並非要角的另一個主要原因是多數拍賣市場上的亞洲藝術專業人士在紐約或香港，而非倫敦。可能的原因是，當代藝術市場發展的

歷史上，與英國相連結且關注於中國當代藝術的專家，多數位於香港。實際上的呈現像是香港蘇富比在中國當代藝術領域上在其全球性的產業運作上具有主導權。至於在產業的其他部分，具專業性的中國當代藝術發展則以紐約為主，可能是因拍賣行部門分類策略的關係，倫敦並沒有處理中國當代藝術專業的部門，而是籠統地囊括在當代藝術的大傘下，使得情勢如此發展，也影響著畫廊的發展。許多專營中國當代藝術的畫廊在紐約經營的比倫敦好。不過這情勢也有可能在未来幾年有所轉變。[Katie Hill, 電話訪談，2013年9月16日]

中國當代藝術在西方雖多被置於「世界當代藝術」的分類下，但在血緣性的文化呈現上，仍與西方的「東方意象」(Orientalism)、「中國意象」相連結。中國當代藝術在西方至90年代發展以來，有很長的一段時間，甚至至今，不論是在學術策展上或是市場反應上，都可以看到這樣的觀點被凸顯。這樣的傾向所造成的結果大致有兩種走向，其一是從對於「新中國」的好奇而生的衍伸。因為中國特殊的政治情勢與結構，形成了中國本身的實際狀況與西方世界如何解讀中國兩者間的落差，形塑了西方世界對於中國的想像，像是對於艾未未的推崇，以及對於處理政治性作品的偏好。這是一個高度文化差異透過作品過度、轉化的問題；因其複雜度高，作品需要被高精緻度的處理和解讀，如果這樣的精緻度無法被預期，尤其是在商業市場上，闡述與解讀很容易被策略性的簡化，文化之間的斷層形成西方市場中中國當代藝術發展的趨勢。

其二是來自於對於傳統「中華文明」的推崇。這趨勢也許與近年來中國市場與買家的強勢高度相關，他們偏好保守且與傳統有較強連結的作品，進而影響了國際市場的多種面向，包括喜好作品的形式與種類。再加上倫敦本身的藝術系統有很強的殖民歷史，在東亞藝術的領域上，有許多在藝術史、博物館脈絡下對傳統物件專精的人士，而在中國古物藝術市場上，倫敦更是擁有論質論量上都相當出色的專家、經紀商以及藏家¹⁰。倫敦的中國古物市場活絡且佔有支配性的地位，也間接影響中國當代藝術的收藏品味，像是近期使用傳統元素與媒材的作品漸受歡迎，以及水墨藝術的復興。

第二節 買家的購買動機與模式

訪談中，幾乎所有受訪者一致表示所接觸到的買家形態、種類多元而分歧。近年來，中國買家人數增加，其購買投機 (speculation) 動機強，收藏品味較保守、傳統，亦傾向購買名家之作，形式上以繪畫為主。至於西方藏家，收購中國當代藝術的人數有些許上升，但因其收藏形式較多元，且僅有少數很專業、專收中國當代作品，大多的收藏模式是將中國當代作品囊括為收藏的部分。過去幾年由於在西方市場的中國當代藝品種類受限且價格過高，亦有西方藏家退出市場，但這負面的觀點在近期中國方經濟力的強勢使得更多元的作品出現在市場上，包括較傳統以及實驗性的作品，情勢也再改變。值得一提的是，在西方藝術交易市場上雖也可嗅到些許「投機」意味，尤其在當代藝術的類別特別明顯，然從近80%的藝品轉手獲利的金額皆低於5,000美元的事實看來，較於近年快

速崛起的中國市場，西方買家的購買動機仍以收藏品味為主。

第三節 拍賣市場的影響

在倫敦的拍賣市場中，中國當代藝術並沒有設置專拍，而是跟所有市面上的「世界當代藝術」一同包含在「當代藝術」的分類下。位於倫敦的各大拍賣行每年舉辦二至三次的當代藝術拍賣：佳士得一年舉辦三次「戰後暨當代藝術」拍賣、蘇富比一年兩次「當代藝術」拍賣，邦瀚斯則有時混合藝術與設計舉辦「當代藝術暨當代設計」拍賣。在這些拍賣中，市場上第一線的中國當代藝術家如張曉剛、岳敏君、方力鈞、趙無極、朱德群、張洄等的作品時常可見，近年亦屢屢拍出高價，像是今年六月的蘇富比拍賣中，已故藝術家趙無極的作品《23.9.98》以高出最高預估價 80 萬英鎊的 96.3 萬英鎊成交。然而，整體而言，中國當代藝術所占的比例仍很低，且僅限於這些市場上價格最高的代表性人物重複出現，作品的形式也多傾向中國當代藝術在市場上多年來所形塑出的“經典、正統”。倫敦拍賣市場反應中國當代藝術的發展，在態度上是後知後覺、不敏感的。

拍賣結果在拍賣市場中具有高度影響力，但由於其所呈現的藝術家只有少數幾位，僅能代表少數高端市場中的藝術家的作品價值，對於一級市場的相關度就相對低很多。然而，由於藝術市場，尤其是其一級市場，普遍透明度低、複雜度高，拍賣結果往往成了少數可依據的指標，大家很容易以拍賣結果去概括論定市場的活絡與走向，而忽略了其他市場實際的表現。近日，倫敦本地的中型拍賣公司 Dreweatts and

Bloomsbury Auctions 首度舉辦了中國當代藝術銷售展《悅色青黃—快速轉換中的人性》，展出了超過一百位中國年輕藝術家共計 150 件作品，此拍賣結果為少數可做為非第一線藝術家市場價值以及倫敦中國當代藝術一級市場情勢的參考。大體而言，從拍賣結果僅能了解當下的市場情勢，倘若要描繪一個趨勢、了解市場品味以及藏家購買行為，則需要較長時間的觀察和追蹤。但仍可從觀察拍賣中高低標的作品，以及進入拍賣市場的新面孔去了解市場的趨勢和轉變。

第四節 美術館等公家藝術機構的影響

近年，倫敦各大美術館、藝術機構皆針對中國當代藝術策畫特展，像是大英博物館於 2012 年的《現代水墨特展》(Modern Chinese Ink Paintings)，以歷史的脈絡為其主要依據，連結中西方的藝術語境，闡述從張大千以來的水墨變，並以劉丹的當代水墨作品做為展出的高潮；同年，Hayward Gallery 的《Art of Change: New Directions from China》中展出來自中國藝術家陳箴（已故）、汪建偉、梁紹基、段英梅、顧德新、徐震、孫原與彭禹等的實驗性作品，包含大量的大型裝置藝術以及表演藝術。這些展覽雖在性質上為非商業性，但因其使這個領域受到關注，大幅提高曝光率，並且讓對中國當代藝術有興趣的人有個可以關注的切入點，或是引起原本不了解的觀眾的興趣，再加上這些大展展期可長達數個月，更愈深其影響力。更甚，這些展覽除了引起藝術界對中國當代藝術的關注，對於參與展出的個別藝術家的市場價值各是有直接、著實的影響，像是在大英美術館的現代水墨特展後，館方便向 Michael Goedhuis Gallery 購入了

幾件劉丹的作品，而徐震等人的作品亦在去年斐列茲博覽會長征藝術空間中展出。

除了展覽帶來的經濟效應，其實展覽從前期的籌備，縱然是美術館等公家機構，也常常有私人畫廊、單位的參與；尤其在英國，公家與私人合作的模式發展得很早也很普遍，許多美術館及藝術單位亦有賴於私人單位提供收藏，並在展覽中給予協助、支持。因此許多當代藝術展覽中都可見私人畫廊的身影，雖不一定在幕前，但普遍存在。Katie Hill 做為 Hayward Gallery 的《Art of Change: New Directions from China》的資策委員之一，在訪談中表示：

此展覽中有幾個畫廊也有參與，像是私人畫廊長征藝術空間等，提供其代理的藝術家作品在展覽中呈現。這可以說是一個雙向的關係，讓作品和藝術家再次受到關注，並在學術上得到批判性的肯定，亦使其在市場上更受到肯定。美術館會透過合作的畫廊與其代理的藝術家溝通、租借作品，合作之後的效應變會延伸至市場，使這些藝術家有效地被行銷，是個雙贏的局面。(Katie Hill，電話訪談，2013年9月16日)

第五節 不同形式畫廊的經營模式

畫廊市場內有其不同的階層與定位，而一級畫廊如白立方、高古軒、Hauser & Wirth、佩斯及 Lisson Gallery 等因其資金流量高、購買力強、擁有完整的商業運作體系與網絡，位於市場的最高端。這些大畫廊經營中國當代藝術家的方式基本上與其經營其他藝術家沒有太大的差別，它們在已成名的中國當代藝術家中選擇可以合作的對象，並以其已建立的專業化的模

式經營，包括密集在藝博會中呈現、標準化的代理及展出。當然，其中每個畫廊的模式與經驗亦有差異，像是佩斯擁有在北京的經營結構，對於中國當代藝術界有較多的了解，代理的藝術家面向也較廣；相對的，Lisson Gallery 在中國藝術專業上就較薄弱，但在對於倫敦當代藝術市場卻有很高的專業度。行銷這些知名中國藝術家是否需要中國當代藝術或市場的專業知識成了一個值得進一步觀察的問題。可以確定的是，相對於在中國國內市場上在運作的藝術家，這些被國際畫廊代理的只是非常小一部份。這些極少數的知名藝術家透過一級畫廊的資源與通路在藝術市場中被大量宣傳、流通，但極大多數的藝術家並沒有足夠的能見度。

至於專職於中國當代藝術的畫廊的理所當然與中國市場保持更緊密的連結，專業度上與其文化以及藝術家們都有較深入的了解和關係。策略上，此類畫廊是以將中國當代藝術做為一個「利基市場」(niche market) 來處理，因此行銷推廣方式，包括所選擇參與的藝博會、宣傳品的書寫方式等都有其目標導向，所建立的網絡性質亦與大畫廊不相同。由於一線畫廊所投注的行銷成本高且其在當代藝術全球市場擁有完善的專業制度，使得知名藝術家傾向與之合作，這將會對同時也經營成名藝術家的中國藝術專業畫廊像是 Michael Goedhuis 帶來挑戰。

第六節 中國情勢造成倫敦市場的困境

多位受訪者皆表示，與中國方合作，法令規範不明確以及商務禮儀 (Business Etiquette) 上的文化差異、信任溝通是很大的困境。前者包括單純要把作品出

口，在法規、稅制、海關制度的不穩定、運輸等等實際運作的制度上都困難重重，後者文化差異導致的觀感、行為上的差異，常見的狀況是中國買家表明或表示購買意願，但過了許久都沒有成交，這是對西方畫廊 / 經紀商是個很大的問題，因溝通、運作的方式的不同失去交易所需的信任。溝通的不安全感更提高交易上的困難度。

更甚，中國國內當代藝術產業的專業性也影響著其在倫敦市場的發展。其專業度尚不足、政治的影響劇烈等各種狀況讓西方市場失去信心和耐心。像是經營中國當代藝術多年的藏家烏利·希克選擇將自己的收藏捐給香港而非北京的美術館便可被視為一個很大的警示，顯示其仍對中國體制下的運作沒有信心、中國藝術產業制度並未有足夠的進步。中國國內的情勢直接影響了在倫敦的人員以及市場，這也是為什麼中國當代藝術在倫敦市場無法達到預期的強勢的很大的原因。對於在倫敦的畫廊 / 經紀商來說，與中國方來往的過程往往不達效果，有時甚至徒勞無功，風險很高。

綜觀以上所述，倫敦深厚的藝術涵養與對藝術品質的要求，以及該地的中國當代藝術經營者對中國所持的不信任感與不安全感成了中國當代藝術在倫敦市場的最大拉扯。

未來，中國當代藝術在倫敦的遍地開花應當還有賴於上述兩點的跟上與改善。然不可諱言的，近日崛起的中國經濟情勢儼然成為影響市場的一股重要力量，某程度上也仍將會是維持西方藝術商業經營者對中國當代藝術熱度的不容小覷的關鍵引力。

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註

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- 3 Richard Widmer、黃詩云、杜昉 (2013)。歷史之路：威尼斯雙年展與中國當代藝術 20 年。北京：中國青年出版社。
- 4 此展於 1993 年至 1994 年間在德國柏林、荷蘭鹿特丹、英國牛津以及丹麥歐丹賽巡迴展出。
- 5 Chinese Contemporary 網站請見：
<http://www.chinesecontemporary.com/>
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<http://redmansion.co.uk/portfolio/welcome/>
- 7 作者參訪 Olyvia Fine Art 時，畫廊經理對於經營方向的改變表示，買家對於中國當代藝術的興致漸減，甚至畫廊的中國客戶目前都對收購西方當代藝術比較有興趣。Olyvia Fine Art 網站請見：<http://www.olyviafineart.com/index2.php>
- 8 丹麥的 Louisiana Museum of Modern Art 以及耶路撒冷 Israel Museum。
- 9 參展畫廊名單詳見：
<http://artfairslondon.com/art13-exhibitors>
- 10 「很中心的一點，在倫敦有比其他各地更多的中國藝術、文化專家，至今仍是如此。當然，近年來在中國出現許多卓越的學者，專業論述上發展的很快，也許即將迎頭趕上。但在商業藝術領域，倫敦還是擁有最多的專業人士，甚至比巴黎或紐約還要更多，約有 20 位深度熟悉中國文化的專業藝術經紀人，其不僅可以辨別古物的真偽，對於市場經營更是非常熟悉。這是因為這裡有相當豐富的博物館的收藏，且有長達兩、三百年的收藏歷史。」(Michael Goedhuis，面談，2013 年 9 月 10 日)



Thematic Paper Session

East Asian Art in London

With Main Concerns on the Primary
Contemporary Chinese Art Market

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Paper Session II / Art Market - Qualitative and Quantitative Analysis

Abstract

The paper focuses on the primary contemporary Chinese art market in London, and through interviews and observations, depicts current market situation and the challenges it is facing. “Chapter One: The Development of London Contemporary Art Market” is a retrospective review on the development of London contemporary art market and that of primary contemporary Chinese art market in London. “Chapter Two: The Current Situation of Primary Contemporary Chinese Art Market in London and Case Interviews” provides an overall description of the current situation of primary contemporary Chinese art market in London, followed by two exclusive interviews of two contemporary main art galleries, Michael Goedhuis Gallery and Hua Gallery, exploring their current state of operation and business model, as well as the relations among the market, collectors and represented artists. “Chapter Three: Art Fair” talks about art fairs that are becoming increasingly active, while focusing on “Art13”, an art fair that is friendly to Asian contemporary arts and most contemporary Chinese art galleries attend. In the interview with Art 13’s Director Stephanie Dieckvoss, she talks about how the art fair has been established and developed, as well as how involved Asian arts currents are. In the interview from “Chapter Four: Problems and Challenges in Current Situation”, Chinese contemporary scholar/Director of Office of Contemporary Chinese Art, Dr. Katie Hill talks about her observations of Chinese Art Market in London, and raises a discussion about the problems and challenges the primary contemporary Chinese art market in London is facing.

Chapter One: The Development of London Contemporary Art Market

London is now the biggest art market in Europe and the second biggest among Western countries. According to the data released by Artprice, an art market research institute, in the whole Western auction market, the UK takes up 30% (99% in London) in 2012, much more than France (7%), Germany (3%), Switzerland (2%), Italy (1%) and the rest¹. Although falling behind the US’s 47% (95% in New York), the UK has the strongest economy and highest culture carrying capacity in Europe. As a result, not only the UK has the entire Europe as its hinterland, well-known galleries and agencies from all over the world are also flocking to London to set up offices. Moreover, the culture of art collection has long been developed in London, making this financial centre home to professional collectors and emerging middle class. Therefore, London has a leading position in European and even global art market. Furthermore, as compared to other art centers, London market has been making breakthrough innovations, especially in the field of contemporary art. London’s contemporary art market has risen in the 90’s and soon become an important global base. It has strong economy and culture carrying capacity, easily embracing artworks of different cultural backgrounds, creation ideas and media. It also allows these artists to be seen in the market. This diversification is rarely seen in other European cities. In the mean time, its local contemporary artists such as Damien Hirst and Banksy, just like China’s Ai Wei-wei and Japan’s Kusama Yayoi and Murakami Ryu, USA’s Jeff Koons, have become big names globally. London has highly developed in every aspect of the contemporary art market.

As an art market with long history, London had collectors of economic power and artistic taste as early as the 17th century, including Charles I of England. In the mid 18th century, the two biggest auctioneering services in the world nowadays, Sotheby's (1744) and Christie's (1766) were established in London. One of England's most prestigious art meccas, Royal Academy of Art (1768) was also founded in the same period of time, influencing the art market to an extensive degree. The 19th century, also known as Victorian Era, was a heyday of art that saw the flourish of art creations and multiplication of collectors. The rise of art dealers boosted the price of artwork even further. In the 20th century, at the outburst of the Second World War, European markets suspended every activity, many artists turned to New York for better opportunities. In the postwar era of 1960's and 1970's, the two leading auctioneering services Sotheby's and Christie's underwent rapid expansion and became international. From 1980's to early 1990's, the art market saw again lively opportunities, and more capital was invested, especially in items of Impressionism and Post-impressionism². In the 90's, the contemporary art market witnessed another peak, and the most important news was that ad tycoon Charles Saatchi purchased a number of artworks of graduates from Goldsmith University of London, bringing fame to Tracey Emin and others, who were later known as "Young British Artists, aka YBAs). Not long after, Tate Modern was founded in 2000, establishing the development of British contemporary art.

Contemporary Chinese art made its first appearance in the Western art scene in the early 90s. In 1993, Chinese artists made their debut on the international stage of contemporary art,

Venice Biennale, and through the promotion of repeated participation in exhibitions, the visibility and recognition of contemporary Chinese art were greatly improved in the West³. From the late 80's to 90's, Hanart TZ gallery curator/director Johnson Chang, began to curate several exhibitions on contemporary Chinese art, including *Post 89: Chinese New Art* touring in Australia, USA and Canada, as well as China Special Exhibitions in the São Paulo Art Biennial in both 1994 and 1996, contributing significantly to the awareness of contemporary Chinese art in the Western art field. In the UK, there were a few art institutions and art galleries, exhibiting the first generation of Chinese contemporary artists that received international attention, such as "China Avant-Garde: Counter-Currents in Art and Culture" in the Museum of Modern Art, Oxford (currently known as Modern Art Oxford), including artworks of Ai Wei-wei, Tsai Kuo-chiang, Liu Xiao-dong, Xu Bing, Liu Wei⁴; in the same year, London's time-honored Marlborough Fine Art held "New Art From China" and exhibited artworks of Wang Guang-yi, Zheng Fanzhi, Fang Li-jun. Through these special exhibitions in the early days, certain British collectors began to grow interests in Chinese contemporary art.

In the early 21st century, mainland China's contemporary art market started to develop. In 2002, Art Districts in China were established, and in the same time, the auction market started to take shape. Compared to the 90s, Chinese contemporary art market grew a lot in a rather short time, and through different channels, such as private galleries, auctions, self-managed studios by artists, or direct sales, all types of trading activities, diverse and complicated, entered the market. China's situation has impact on the development of Western market.

In London, art galleries and dealers specializing in Chinese contemporary art started to emerge, and “Chinese Contemporary” established by Julia Colman and Ludovic Bois is an example of the early days. It held individual exhibitions for Yue Min-jun, Wang Jin-song and Yang Shao-bin, and curated for a few individual exhibitions in Europe for Zhang Xiao-gang⁵. Established in 2005, Olyvia Fine Art is another pioneering example. At the same time, Red Mansion Foundation was also founded as a platform for promoting Chinese contemporary art and exchanging between China and the UK⁶. However, these few dealers or institutions focusing on Chinese contemporary art in London were not very successful in the early days. After a few years, Chinese Contemporary shifted its focus and left London, while Red Mansion Foundation terminated its operation. Although Olyvia Fine Art still manages some Chinese contemporary artworks, its focus has already altered to Western contemporary art⁷. In regards of the reasons why art galleries/dealers focusing on Chinese contemporary art could not successfully continue operation, Dr. Katie Hill, Chinese contemporary art scholar/Director of Office of Contemporary Chinese Art, explained in an interview: (Interview with Katie Hill, September 16, 2013)

“London market is quite conservative towards China, having doubts in the ‘new China’ situation. In real operations, China’s art market is lack of expertise and full of unpredictability, from laws and regulations, tax system to culture and customs, there are a lot of insuperable difficulties that Western galleries/managers cannot overcome, and thus it is very difficult to have mutual cooperation unless they have some China experts. In the past, these galleries probably had problems finding their

target clients, plus managing a gallery in London is at considerable costs, so the risk is even higher. But the main reason is there are too many unspoken rules when dealing with China so most people are not very zealous about it.”

Chapter Two: The Current Situation of Primary Contemporary Chinese Art Market in London and Case Interviews

There are about 3 to 5 Chinese contemporary art galleries/dealers currently active in London market. As mentioned before, galleries or dealers who were involved in the early days either withdrew or shifted to other fields, and in recent years, there have been newcomers investing in the market, or dealers of Asian antiques started to manage Chinese contemporary art. As a result, although the total number of dealers is close to that of a decade ago, the actual members are different. Michael Goedhuis is one of the very few long-term dealers specializing in Chinese art in London, and he has been devoting to Chinese contemporary ink painting, a field that did not receive too much attention but began to stand out in market in recent years. Open in 2011, Hua Gallery is one of the few art galleries that have their own space and the only one specializing in Chinese contemporary art. Hai Gallery is relatively small in terms of scale, and most of its artists are new emerging stars or second-tier artists. Another gallery that is still managing a few first-tier Chinese contemporary artists is Olyvia Fine Art, but it has shifted its focus on Western contemporary art. Rossi and Rossi, building up its business as Asian antiques dealer, once put their emphasis to Chinese contemporary art in 2007, holding a series of exhibitions on Chinese contemporary photography,

also turned their attention to Tibetan Arts and abandoned Chinese contemporary art as their main theme.

Other than these professional galleries/dealers focusing on Chinese contemporary arts, there are also others that include a few artworks of Chinese contemporary artists in their collections. When world class first-tier galleries manage first-tier Chinese contemporary artists, their influence and impact are significant. These big-scale galleries look for cooperation among well-known artists and manage them individually. For example, White Cube has about 50 international level artists, including Liu Wei and Zhang Huan. Gagosian has more than 100 artists and only one of them is Chinese—Zeng Fanzhi, who held individual exhibition in London in 2012. Among the 50 more artists managed by Hauser & Wirth is Zhang En-li. Moreover, the prestigious and influential Lisson Gallery in London represents Ai Wei-wei and will curate the first individual exhibition for Liu Xiao-dong in the UK. Among these first-tier galleries, Pace Gallery is the only one having operating experience in Beijing and thus represents more Chinese contemporary artists; however only a few have ever had individual exhibitions in London. These international galleries do not necessarily have expertise of Chinese contemporary art but since they are on the top of the market with great capital flow and purchasing power, they can easily connect to the international market and exert great influence on the contemporary art market. The way they represent Chinese contemporary artist is also very different from that of galleries specializing in this.

Chapter Three: Art Fair

The current situation of London Art Fair

Art fairs are served as a platform for network building, where buyers and dealers browse artworks and exchange information with art galleries and artists. A long-term operating art fair can be an important platform for maintaining these relations. Galleries and artists can develop buyers who provide them stable supports, and buyers can expand their own collections at art fairs. According to the statistics by Artnet, the total sales volume of art fairs in 2012 takes up 31% of global art trades by dealers, showing that the importance of art fairs is increasing in the global art market. On the other hand, art fairs have also changed the original operating and sales modes of art galleries. Art galleries attending international art fairs have the opportunities to expand their business that used to be regional to the international arena; numerous art galleries started to hire representatives, and even set up special departments to attend annually all kinds of art fairs, focusing on managing their own “art fair brands”. Although some critics believe big art fairs are like “festivals”, where the real quality of artworks is sensationalized by the bustling atmosphere, and where money talks louder than academic quality. Therefore, art becomes commodified. Nevertheless, some people hold converse opinions believing that art fairs can promote the democratization of art, and in art fairs, people who are interested in and capable of buying artworks can have direct access to artworks, bringing more new buyers to the whole gallery field.

Among London’s major art fairs, the one with the longest history is London Art Fair and 20/21 British Art Fair, both founded in 1988. The former focuses on being the exchange platform for local art galleries, and the latter insists on orthodox, only exhibiting British contemporary artworks. Both art

fairs' main concern is British art and market and thus have low relevancy to Chinese contemporary art. Founded in 2003, Frieze Art Fair is undoubtedly the center of attention among all art fairs in London. It was founded on the contemporary art magazine *frieze*, and nowadays every year there are about 170 exhibitors and over 60,000 visitors. Since 2012, it launched the whole new "Frieze Master" during the exhibition period, opening a new market for artworks before the 20th century. Generally speaking, however, Frieze Art Fair is still another art fair that focuses on Europe and the US, with only a few Asian exhibitors per year. "Long March Space" from Beijing and Vitamin Creative Space from Guangzhou participate every year recently, becoming fixed members and representatives of Chinese contemporary art. Apart from that, some first-tier galleries now and then make their appearance, such as White Cube, Gagosian Gallery, Pace Gallery and Hauser & Wirth, exhibiting famous Chinese artists they represent.

Recent years have witnessed another establishment of a massive art fair. After the success of Art HK, Art Fairs London Ltd established the whole new Art13, and in the spring of 2013, sponsored by Citi Private Bank, made its debut in the Olympia Grand Hall in West London, opening up a new outlook for London art market. The founders Tim Etchells and Sandy Angus aim to establish the "Europe's first truly global art fair", and invited Stephanie Dieckvoss, former manager of Frieze Art Fair, Director of Joint Fair, and curator of Serpentine Gallery, to be the Director of the Art Fair. The first year of Art13 attracted 129 galleries from 30 countries to participate. Even though about 40% of exhibitors come from Europe and America, and the ratio is similar to that of Frieze Art Fair, there is a

surprising number of 20 East Asian galleries in the fair, including Beijing's Aya Gallery, Boers-Li Gallery and Pifo Gallery, Hong Kong's Amelia Johnson Contemporary, Pearl Lam Gallery and World Gallery, and Shanghai's Vanguard Gallery, and the number of Asian participants in the fair is rarely seen in European art fairs. Moreover, Asian galleries in London also attend the fair, including Michael Goedhuis Gallery focusing on Chinese contemporary art and Hua Gallery and Rossi & Rossi. Its abundant Asian experience and ambition of introducing art from different regions to London are well seen. The art galleries in this study all express their satisfaction of Art13 in terms of sales and business expansion, and they will attend Art14 next year. It is worth observing whether Art13/14 will continue to be a stable platform for Chinese contemporary art to be developed in the London market.

The Interview with Fair Director of Art13 Stephanie Dieckvoss

(Email interview with Stephanie Dieckvoss, Fair Director of Art13 on June 17, 2013)

Q: In the past few decades, the number of art fairs has boomed globally. How do you see this global art fair phenomenon? Could you please briefly introduce the establishment of Art13, and what role you see Art13 plays among the global/London art scene? How does the Fair distinguish itself from the other major art fairs in London?

A: Art Fairs reflect changes in the art market in relation to the way works of art are being not only bought and sold, but especially viewed and perceived.

There are many reasons why art fairs are now the most important way to engage with art commercially (but also curatorially); one of them is that they bring a large variety of works together in one convenient place that engages collectors in ways a ‘normal’ gallery show can’t anymore. For this reason they are the most important platform where galleries, collectors, curators and critics come together. For many galleries, art fairs are the most important source of income and without fairs galleries would struggle to sell works as well as foster the careers of their artists internationally. Understanding the changing structures, we believe London as the most international art centre has the potential to develop a new global art world hub. One of the two original founders of Art13, which I am heading strategically, is also the founder of Art HK, who has experience of the Asian art market. From the start we had a unique focus in bringing underrepresented, non-Western, global art into a dialogue with Western peers in London. Art13 is unique, at least in Europe, in its focus on introducing art also from “emerging” art regions to a Western audience. Many fair only showcase 1-2 galleries from a certain territory and therefore cannot present the whole picture of art development of that region, which is something Art13 is aiming to do, and we have successfully done so in our inaugural year. As I said, Art14 London is unique in its positioning: a truly global outlook, 70% of artists in 2013 had not been shown in London before, catering to an equally global audience in a welcoming and friendly as well as manageable (in terms of size) environment is what journalists called “refreshingly different” (Georgian Adam) and which was successful for gallerists and collectors alike.

Q: Comparing to other major art fairs in London, such as Frieze and London Art

Fair, Art13 has more non-Western/Asian exhibitors. Is this related to the fact that the Fair team has stronger connection and more experience with Asia (previous Art HK)? Is this also a part of the Fair’s policy to include more non-Western/Asian participants? Generally, what are the main criteria for selecting participants?

A: Yes, the links to HK are very important for the development of the fair. On one hand we could gain overall experience with Art HK, and on the other hand, I personally gained experience that opened my eyes to art I had no knowledge about and that is truly engaging and stimulating and needs greater emphasis in the West. This has very much shaped the fair’s strategy. We were very happy that the first year of Art13 received a lot of support from many Asian galleries. The selection of galleries is conducted by a selection committee consisting of a group of curators. Selection is solely based on quality of the proposals a gallery has applied with in terms of stand concept, quality of artists and visual diversity. So far we have not yet had to introduce country quotas but this is something that might be of relevance on future years.

Q: In terms of sales volume, how are non-Western/Asian galleries received? In your opinion, generally, how were the sales of Art13?

A: The non-Western galleries were extremely well received. Most galleries not only sold well, but also met interesting clients and forged links with

curators, museum directors and other galleries in terms of potential exposure of their artists at exhibitions. This proved to be the case for younger as well as more established galleries (throughout). (Further sales details can be found in the final fair press release you can download from our website!). In general collectors came to the fair with the ambition to discover art, so they were extremely open to new positions. Overall, sales were strong and price ranges, media and forms varied. Of course not everyone can do well in a first year fair, but ca. 80-90 % of galleries intend to return to the fair in the coming year.

Chapter Four: Problems and Challenges in Current Situation

The Influence of Culture, History and Human Institutions

“London’s Chinese art market is relatively small and niche, as well as fragmental and quiet.” (Telephone interview with Katie Hill on September 16, 2013). UK’s Chinese contemporary scholar Katie Hill talked about the problems Chinese contemporary art is facing in the London market, such as unstable artwork quality in a highly competitive environment. Besides, to look from the aspect of culture and history development, as compared to other regions, Chinese contemporary art in London does not have any advantages. Moreover, in respect of global market development, human institutions also play a role in regional development, especially in the field of contemporary art, which is relatively closed and highly related to its culture and academic development. Another key factor for market development of Chinese contemporary art is the regional distribution of professionals.

Chinese contemporary art is often categorized under “international contemporary art” in the West, but it is still connected to “Orientalism” and “Chinese image” in terms of cultural presentation of consanguinity. Since its development in the 90s in the West, Chinese contemporary art has been and still is highlighted in such a way both curatorially and market-wise. The outcomes of such tendency mainly have two trends. One is derivation out of the curiosity of “New China”. China’s special political situation and structure lead to a gap between China’s actual situation and Western interpretation, shaping the Western images of China, such as the high praises of Ai Wei-wei, as well as the preference of political themes. This is a matter of huge cultural differences being over-transformed through artworks. Due to its complexity, artworks need to be handled and interpreted in a highly exquisite sense. If such exquisiteness cannot be expected, especially in commercial market, elaboration and interpretation are easy to be strategically simplified, and cultural fractionalization will become the development trend of Chinese contemporary art in the West.

The other trend is how traditional “Chinese civilization” is being praised. The trend may have been related to the strong preference of Chinese market and buyers: they prefer more conservative and traditional artworks and thus impose influence on the international market, such as preferred format and type of artworks. This is intensified by the colonial history of London’s art system, so in the field of East Asian art, there are many professionals in the context of art history and museums, and in the Chinese antique art market, there are a significant amount of outstanding experts, dealers and collectors⁸. London’s Chinese antique market is very lively and dominant, indirectly affecting the collecting taste of Chinese contemporary art. Some

of the good examples are the popularity of using traditional creation elements and media, and the renaissance of Chinese ink painting.

Buying Motives and Modes of Buyers

In the interviews, almost every respondent mentioned about the diversity of buyer types. In recent years, the number of Chinese buyers increased, and their motives of speculation is really strong, while their taste for collecting is more conservative and traditional, so they tend to purchase artworks from famous artists and the creation format is usually paintings. As to Western collectors, the number of buyers purchasing Chinese contemporary art might have increased slightly, but the artworks they collect are more diversified, and only a few professional Chinese art collectors. Most of them are meant to include Chinese contemporary artworks in their collections. In the past few years, due to the limited types of Chinese contemporary artworks in the Western markets and high prices, some Western collectors withdrew from the market. However, the unfavourable situation has been again changed by the presence of more diversified artworks in the market, including both more traditional and experimental works, due to China's uprising economic power. It is worth mentioning that although in the Western art market, "speculation" has made its presence, especially in the genre of contemporary art, nearly 80% of artworks sold at the profit are below USD 5,000, as compared to the uprising Chinese market, the motive of Western buyers is still mainly for collection and appreciation.

The Influence of Auction Markets

Chinese contemporary art does not have specialized sales in London's auction market

but categorized under "contemporary art". Major auction house in London hold 2 to 3 times contemporary art auctions per year: Christie's have three auctions per year on "Post-war/contemporary art", Sotheby's have contemporary art auctions twice a year and Bonhams Auctioneers sometimes combines art and design to have "contemporary art and design" auctions. In these auctions, first-tier Chinese contemporary artists such as Zhang Xiaogang, Yue Ming-jun, Fang Li-jun, Zhao Wu-ji, Ju Thechun, and Zhang Huan can be seen very often, and their works were sold at high prices. In Sotheby's auction this year in June, the work "23.9.98" by the deceased artist Zhao Wu-ji was sold at the price of GBP 963 thousand, much higher than its estimated price of GBP 800 thousand. However, in overall, the percentage of Chinese contemporary art is still low, and the representatives are limited to the artists whose works can be sold at highest prices in the market, and the format of artworks is inclined to be what Chinese contemporary art has been trying to establish for years in the market— "classic" and "orthodox". London's auction market reflects the development of Chinese contemporary art as "lagging" and "insensitive".

The results of auction have significant influence on the auction market, but since it only reflects a few artists, it can only represent the value of artworks in the high-end market, and its relevancy to primary market is relatively low. However, since art market, especially primary market, is generally lacking or transparency and full of complexity, the results very often become an index that only a few can refer to, and people tend to conclude the circulation and direction of a market based on auction results and neglect the actual performance in other markets. Recently, London's local mid-

sized auction house Dreweatts and Bloomsbury Auctions held for the first time the selling exhibition of Chinese contemporary art titled “Blue & Yellow: Swift Transitions of Self”, exhibiting a total of 150 artworks by more than 100 Chinese young artists. The auction result is one of the few that can be a reference for non first-tier artists’ market value and London’s primary contemporary Chinese art market situation. Overall speaking, through auction results, one can only understand the current market situation; if one is to depict a trend and get a comprehensive understanding of market taste and collector purchase behaviour, longer time of observation and tracking are required. However, one can still grasp a whole picture of market trends and changes by observing high-bid and low-bid artworks in auctions and the newcomers entering the auction market.

The Influence of Museums and other Public Art Institutions

In recent years, major museums and art institutions in London have all curated special exhibitions exclusively for Chinese contemporary art, such as the “Modern Chinese Ink Paintings” in British Museum in 2012, under the historical context to connect with art contexts of China and the West, elaborating the changes in Chinese ink paintings since Zhang Da-qian and using Liu Dan’s contemporary ink painting as the climax of exhibition. In the same year, the exhibition of “Art of Change: New Directions from China” by Hayward Gallery displayed experimental artworks of Chinese artists Chen Zhen (deceased), Wang Jianwei, Liang Shao-ji, Duan Ying-mei, Xu Zhen, Sun Yuan and Peng Yu, including a significant amount of large installation art and performance art. These exhibitions are not commercial in nature, but due

to the attention this field is receiving, the exposure rate was high. Moreover, it allowed people who were interested in Chinese contemporary art to have an access to it, or even aroused interest in those who were not familiar with Chinese contemporary art. These major exhibitions can last up to a few months and therefore their influence was intensified. These exhibitions not only attract attention of art industry to Chinese contemporary art, they also have direct and significant influence on the market value of individual artist. For example, after the exhibition of ink painting in British Museum, the Museum purchased a few artworks of Liu Dan from Michael Goedhuis Gallery, and the artworks of Xu Zhen and others were also exhibited in last year’s Frieze Art Fair at Long March Space.

Other than the economic benefits brought by exhibitions, as a matter of fact, since the preparation of pre-exhibition, even though the venue is public art institutions like museums, private galleries may participate. Especially in the UK, it is very common that public institutions work with private sectors, and many museums and art institutions have to rely on private units to provide collections as well as assistance and supports during exhibitions. Therefore, private galleries can be seen in many contemporary art exhibitions although not necessarily in front of the scene.

Business Models of Different Art Galleries

In the market of gallery, there are different levels and positioning. First-tier galleries such as White Cube, Gagosian Gallery, Hauser & Wirth, Pace Gallery and Lisson Gallery are on the top of market because of their high capital flow, strong purchasing power and complete operating system and network. The way these major galleries manage their Chinese

contemporary artists is not so different than the way they manage other artists: they choose from the already famous Chinese contemporary artists and adopt established professional business models, including intensively presence, standardized representation and exhibition in art fairs. Needless to say, the business model adopted by each gallery is different from each other, for example, Pace Gallery has more understanding of Chinese contemporary art under their management structure in Beijing, and the artists they represent are of more diversity. Comparatively, Lisson Gallery is weaker in terms of expertise of Chinese arts, but it is highly professional in London's contemporary art market. It is worth observing whether it requires expertise of Chinese contemporary art or market to promote these well-known Chinese artists. What can be sure is the number of Chinese artists represented by international galleries is relatively small as compared to those active in Chinese domestic market. These very few famous artists are intensively promoted and circulated through the resources and networks of first-tier galleries, but most of artists do not have enough visibility.

Galleries that focus only on Chinese contemporary art naturally have closer connections with Chinese market, as well as better understanding and relations with artists professionally and culturally. Strategically, this type of galleries manage Chinese contemporary art as "niche market", and therefore the marketing strategies, including the art fairs they choose to attend, the way they design their propaganda, are very goal-oriented, and the nature of network they build is different from that of major galleries. Since first-tier galleries invest more in marketing and have more expertise in global contemporary art market, famous artists prefer to

work with them, and this also brings challenges to professional Chinese art galleries that manage famous artists, such as Michael Goedhuis.

The Difficulties in London Market Due to Chinese situation

Numerous respondents mentioned the miscommunication and lack of trust caused by unclear laws and regulations and business etiquette from different cultures. The former is mainly about when exporting artworks, from the uncertainty of regulation, tax system and custom system, to shipping and logistics. The latter is how cultural differences can affect perceptions and behaviours. It is very common that Chinese buyers show their interests in purchasing but fail to close deals eventually. This is a major concern of galleries/dealers in the West: lack of trust caused by differences in communication and operation. This insecurity of miscommunication makes it more difficult to close a deal.

Moreover, China's domestic contemporary art industry lacking expertise also influences its development in London market. The numerous factors, such as the lack of professionalism and unfavourable political situation take away Western market's confidence and patience. The well-know collector Uli Sigg has been managing Chinese contemporary art for many years. His decision to donate his collection to Hong Kong but not Beijing can be seen as a big warning, demonstrating that he has no confidence in the Chinese authority and there has not been enough improvement of Chinese art industry system. China's domestic situation has direct impact on its art market and dealers and that is also why Chinese contemporary art could not reach its expected achievement in the London

market. To the galleries/dealers in London, the experience of dealing with China has never lived up to expectations and sometimes even been in vain and highly risky.

To conclude all the above-mentioned points, London's profound art conservation and strict requirement for art quality, as well as its Chinese contemporary art dealers' doubts and insecurity towards China, have all become the biggest struggle for Chinese contemporary art in the London market. In the future, the widespread of Chinese contemporary art still relies on the improvement of the two points mentioned above. However, it must be acknowledged that China's recently rising economic power has become an important factor influencing the market and to some extent will still be a critical gravitation of Chinese contemporary art to Western commercial art dealers.

note

- 1 The data come from *The Art Market in 2012*, co-published by artprice.com and Art Market Monitor of Artron.
- 2 Jeremy R. Howard. Art Market. Encyclopaedia Britannica. <http://www.britannica.com/EBchecked/topic/1557506/art-market/282956/German-museums#toc282958>
- 3 Richard Widmer, Shih-yun Huang, Fang Du (2013) *Passage to History 20 Years of the Venice Biennale and Chinese Contemporary Art*, Beijing, China Youth Press.
- 4 This exhibition was on tour in Berlin (Germany), Rotterdam (Holland), Oxford (UK), Odense (Denmark) during 1993 and 1994.
- 5 Chinese Contemporary Website : <http://www.chinesecontemporary.com/>
- 6 The Red Mansion Foundation Website: <http://redmansion.co.uk/portfolio/welcome/>
- 7 When the author visited Olyvia Fine Art, the gallery manager pointed out that, in respect of the alteration of operating direction, buyers started to lose interest in China contemporary art, and even their Chinese clients are more interested in purchasing Western contemporary artworks. Olyvia Fine Art Website: <http://www.olyviafineart.com/index2.php>
- 8 "It is a critical point that in London there are more Chinese Art and Culture experts than in any other places, and it is so till now. Of course, in recent years in China, many outstanding scholars began to emerge, and its professional discourses have been developed rapidly and might soon be catching up with London. However, in the field of commercial art, London still has the most professionals, even more than Paris or New York. There are about 20 professional art managers who are deeply familiar with Chinese culture. Not only they can determine the authenticity of antiquities, they are also very familiar with market management. This is because there are abundant collections in museums, and the collecting history has been more than two, three hundred years." —Interview with Michael Goedhuis, September 10, 2013.

蕭雅文

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台灣大學昆蟲學系學士，倫敦大學國王學院文化創意產業碩士，現就讀於倫敦蘇富比藝術學院當代藝術研究所。曾任倫敦斐列茲藝博會媒體接待專員、台灣國藝會專案研究助理、有時藝術顧問公司專案總策畫，並參與台北藝術產經研究室藝術市場研究專案。為當代藝術展覽、市場專文撰稿人。

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全球藝術市場報告

全球藝術市場報告 2012-2013 展望 2014 年及未來藝術市場走向

詹姆士 · 古德溫

藝術市場專家

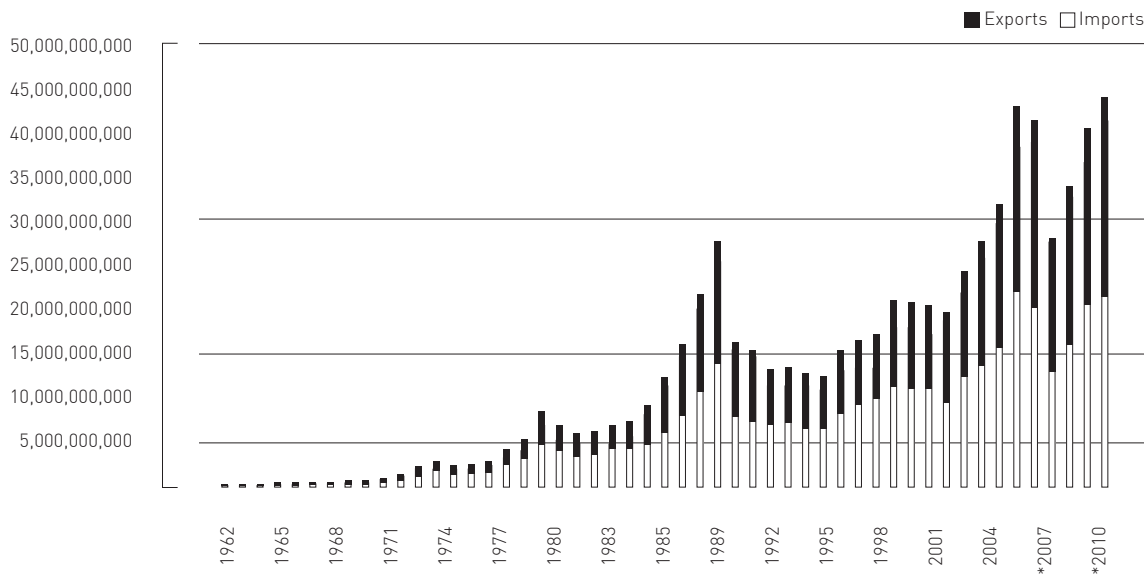
由於全球化促使了經濟繁榮與文化發展，現今的藝術市場也比起過去有文字記載以來的五百多年歷史發展更為廣泛且迅速。過去 20 年中，國際藝術貿易額成長了三倍以上，在 2012 年更超過了 430 億美元（詳見圖表）。其中，逾三分之二的貿易額仍發生於美國與英國，並在過去十年中加入一些新興藝術市場，如香港及中國、南韓、印度和新加坡，以及一些為人所熟知的西歐國家。

就文化層面而言，由於博物館的翻新與開放，越來越多的民眾參觀國內外的展覽，人數較以往大為增加。而為了吸引日漸增多的觀光客，各國的藝術展覽形式也愈趨多元。延續了長久以來的趨勢，全球最受歡迎的藝術展覽主要舉辦於日本和美國，近幾年巴西和南韓的舉辦的展覽也漸受矚目。

為因應這些需求，藝術產業相關的人員與機構也呈現大幅度的成長：諸如藝術家、畫廊、經銷商、藝

International Trade in “Works of art, collectors’ pieces & antiques” (\$US)

Source: United Nations



術博覽會、拍賣公司、以及藝術市場相關的法律、諮詢、估價、修復服務和媒體。所有單位都促使藝術網絡的行銷和營運效率提升。在全球藝術市場，估計有 40 萬的相關企業提供了 240 萬的工作機會。僅僅在英國，保守估計就有 6 萬名藝術家。在 180 個最好的藝術博覽會中，有超過 20 個是位於新興國家中。有鑑於藝術貿易不斷的增長，主要的藝術拍賣公司在 45 個國家設有分公司，並在其中 9 個地點定期舉辦拍賣會。拍賣出售的藝術品包括了來自超過 30 個國家的 20 種藝術類別，像是油畫、陶瓷、家具等。

藝術吸引了愈來愈多尋求增加資產配置選擇的人士，儘管作品保有貨幣價值或其價值持續增長，他們也講究作品本身的情感抒發與美學。調查顯示，絕大多數的收藏家購買藝術品是基於情感認同，而為了經濟的考量購買藝術品的藏家不超過半數。

然而，對於藝術的愛好者而言，藝術市場是一個籠罩在神秘面紗下的美妙奇觀。藝術市場受到 2007 與 2008 年金融風暴的影響遠比其他資本市場低，這已然成為藝術市場富有魅力的原因，尤其在目前藝術品的國際貿易額已達到 50 年來的新高。

瞭解藝術市場能夠提供初入門以及有經驗的藝術收藏家、相關從業人員、研究者以及對藝術感興趣的人一個機會，以對於這個世界上歷史最悠久的貿易之一有所瞭解。

所以，藝術市場是如何發展成今天的模樣，未來又是如何？

本次的講座將提出最可靠的數據和最為客觀的質性調查，以呈現獨特、客觀的藝術市場觀點與其發展趨勢。

首先，詹姆士·古德溫 (James GOODWIN) 將批判性的審視蓬勃發展的藝術市場研究。為了能夠廣泛而清晰的概述藝術市場，整場講座提供的資料將來自於藝術市場歷史、藝術價值、藝術市場功能、藝術營運、稅務、法律，各單位為人所知的文獻。

在相關資訊的講授方面，詹姆士·古德溫 (James GOODWIN) 將以最新的分析方法介紹給與會者。與會者將透過藝術市場外部環境研究，了解其如何形塑藝術品交易；並注意到普遍的商業形式與藝術品交易的異同。因素分析 (Factors for analysis) 將包含了經濟、政治、法律、科技、人口、社會和文化。藝術商業的競爭力將以商業策略工具，像是五力分析 (five forces analysis) 進行解釋。

最後，詹姆士·古德溫 (James GOODWIN) 將串連各相關產業趨勢，藉以預期未來甚至到 2050 年的藝術市場情景，幫助我們能夠提前做出更好的決策；並且也將為與會者初步分析這些趨勢將如何影響台灣的藝術市場。



Global Art Market Report

Global Art Market Report 2012-13 Looking to 2014 and Beyond

James GOODWIN

Art Market Specialist

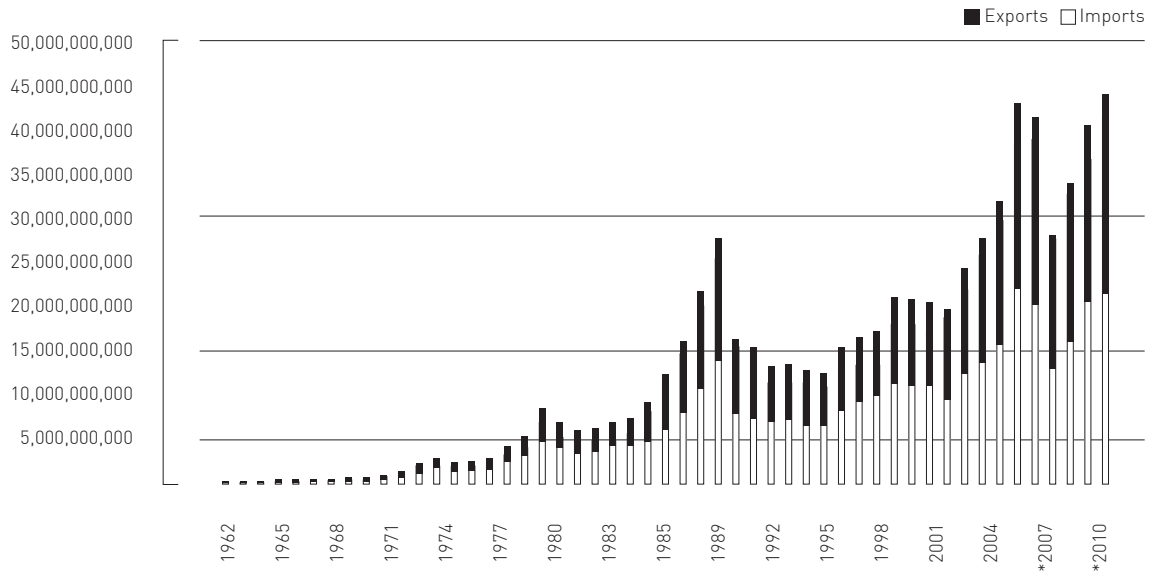
The art market is developing broadly and faster than at any time in its five hundred year recorded history, thanks to the economic and cultural advances of globalisation. The international trade in art has grown over three times in the last twenty years to over \$43bn in 2012 – see graph. Over two thirds of this trade is still conducted via the USA and Britain joined in the last decade by newly developed countries such as Hong Kong/China, South Korea, India and Singapore as well as familiar western European countries.

At a cultural level, more people are visiting exhibitions both at home and abroad than ever before, encouraged by museum refurbishments and openings. In a bid to attract the growing number of international tourists their exhibitions are engaged with a more diverse range of art. Continuing a long trend the most popular exhibitions worldwide have been in Japan and the USA accompanied in recent years by Brazil and South Korea.

In response to this demand, there has been a prolific growth in artists, galleries, dealers, art fairs,

International Trade in “Works of art, collectors’ pieces & antiques” (\$US)

Source: United Nations



auction houses, and art market services in art law, advisory, valuation, restoration and media; all of which are making greater use of the internet for marketing and operational efficiency. Worldwide it is estimated the art market supports 2.4 million jobs among 400,000 businesses. In the UK alone by conservative estimates there are over 60,000 artists. Among the 180 best art fairs over twenty are located in developing countries. As a result of the growing trade in art, the major auction houses have offices in 45 countries and auction regularly in nine locations. The items sold include 20 art categories, such as paintings, ceramics and furniture, from over 30 countries.

Art increasingly appeals to those seeking assets which appeal aesthetically and emotionally while holding or increasing in monetary value. Surveys show that the overwhelming majority of collectors buy art for emotional reasons and less than half do so for financial reasons.

Yet for many interested in art the market is a fine spectacle which is shrouded in mystery. The art market's relatively immunity to the ongoing 2007/8 financial has become a source of fascination especially now that its international trade has reached a fifty year high.

Understanding the art market presents an opportunity for new and existing collectors and trade practitioners, along with researchers and those generally interested in understanding one of the world's oldest trades.

So, how has the art market developed to this point and what maybe its future?

This lecture will use the most reliable data and objective qualitative evidence, to present a unique, rounded view of the art market and its development trends.

At first it will bring together and observe with a critical eye the burgeoning number of art market studies. For a broader and clearer overview of the market, information using all the known literature on art market history, value, market functions and operation, as well as tax and law will be drawn together.

The instructive aspects of this information will be presented using the latest analytical methods. They will be shown as a study of the art market's external environment and how that shapes the art trade; noting the similarities and differences between the art trade and most businesses. Factors for analysis will include the economy, politics/law, technology, demography, society and culture. The art business's competitiveness will be explained using business tools such as the five forces analysis.

Finally, any trends will be gathered together to envisage scenarios for the art market, in some cases as far ahead as 2050, in the interests of better decision making today for our tomorrows. As far as possible, I will also demonstrate how these trends will affect Taiwan's art market anticipating the Asia market report lecture which follows.

詹姆士·古德溫

藝術市場專家

詹姆士·古德溫 (James GOODWIN) 在下列院校教授藝術市場課程：佳士得英國及香港分校、荷蘭馬斯垂克大學 (Maastricht University)、巴黎高等商學院 (HEC Paris)、法國馬賽商學院 (EuroMed Management)。同時，他也是英國倫敦政治經濟學院 (LSE)、金士頓大學 (Kingston University)、城市大學 (City University)、義大利威尼斯卡佛斯卡利大學 (Ca' Foscari University) 與荷蘭鹿特丹伊拉斯姆斯大

學 (Erasmus University Rotterdam) 的客座指導教授。

古德溫的研究與文章曾刊登於經濟學人 (The Economist)、金融時報 (Financial Times)、華爾街日報 (Wall Street Journal)、BBC 的電視及廣播節目和 CNN 亦曾報導他的研究。其著作「國際藝術品市場 - 收藏家與投資者手冊」分析了 42 個國家的藝術市場。該書英文版於 2008 年 7 月問世，中譯本於 2010 年 6 月出版。

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His research and writing has appeared in The Economist, Financial Times and Wall Street Journal and has been broadcast on BBC TV and Radio, and CNN.

His book The International Art Markets - The Essential Guide for Collectors and Investors which includes 42 country's art markets was published in English in July 2008 and in Chinese in June 2010.





亞洲文化自由港的趨勢與戰略

免稅而多元的視覺藝術品服務平台： 下一步是什麼？

東尼·雷納德

新加坡自由港房地產管理有限公司主席

未來，免稅而多元的服務平台是否會成為亞洲視覺藝術市場的主流？

2009年冬天，全球第一個獨立平台在新加坡樟宜國際機場（Singapore Changi International Airport）開始營運。

它的位置、運作框架、規範，迅速地使新加坡自由港成為針對富有價值藝術品的交易和儲存的首選之地。而其他珍貴的物品，如貴金屬和寶石也很快地效仿跟進。新加坡自由港目前計畫擴建2萬5千平方米，屆時其營運效能可望提升。

由瑞士團隊所設計、建設、提供資金和管理的新加坡自由港，率先在經濟繁榮的星國啟用，成為許多亞洲創業家期望效仿的典範。亞洲是否很快就會有類似的設施出現在東京、首爾、台北、香港、澳門、上海和北京？

許多客觀因素都指向一個最有可能的答案：中國——一個在藝術拍賣場中具有影響力的世界第二大經濟體。日益繁榮的景象指出中國中高收入者的可支配收入（disposable incomes）將穩定增長。境內的自由貿易區可望提供合適的地點，以提供中國擁有類似新加坡自由港的設施。近來金融體系的開放，已標幟著其自由化的趨勢。對於投資有價證券的疑慮，有助於實體資產投資的增加，例如繪畫、古董和文物。最

後，高額的進口稅賦——例如一幅油畫的CIF（成本+保險費+運費）稅率高達24.02%——使藝術品交易漸轉往自由港進行。

然而，影響這些轉向自由貿易區進行貿易的客戶之主觀因素是難以估量的。這些支持類新加坡自由港設施建置者所面臨的挑戰，主要在於是否能建立一個高水平的信任度，以保護機密的訊息。客戶所期望的保密層級，是能夠媲美世界各大自由港相關的規範。因此可以確定，對於物品資訊的保密：像是所有權人及價值等，將是極為重要的。

在過去十年中，視覺藝術品的消費在亞洲呈現倍數地增長。我們認為自由港這類提供視覺藝術品免稅且多元服務的平台，將是最終的交易場所。它提供對藝術品投資感興趣的人一個安全、私密而方便的一站式購物（one-stop shopping, OSS）平台。我們也期待能以良好的監管和安全措施作為基礎，在亞洲推廣新加坡自由港的成功模式。



Culture Freeport in Asia: Trends & Strategies

Tax-Free Multi-Service Platforms for Works of the Visual Arts: What's next?

Tony REYNARD

Chairman of The Singapore Freeport Real Estate Pte Ltd

Is the future of tax-free multi-service platforms dedicated to works of the visual arts in Asia?

The world's first stand-alone platform started operations in the winter of 2009 at Singapore Changi International Airport.

Its location, regulative framework, and specifications swiftly turned The Singapore Freeport into the place of choice for, inter alia, the storage and trade of valuable works of the visual arts. Other valuables such as precious metals and gems soon followed suit. The Singapore Freeport is now planning a 25' 000 m² extension that will more than double its operational capacity.

Designed, engineered, financed and managed by a Swiss team, The Singapore Freeport became the model that many an entrepreneur in Asia wishes to emulate. Plans to replicate The Singapore Freeport are under way in the continent's most prosperous economies. Will there soon be similar facilities in Tokyo, Seoul, Taipei, Hong Kong, Macau, Shanghai and Beijing?

Many objective factors in the People's Republic of China, the world's second economy and already a major player in art auctions, point to a positive answer. The rising prosperity indicates that its middle and upper-middle classes disposable incomes will grow steadily. Free Trade Zones might soon offer suitable locations to "Singapore Freeport

like" facilities. The banking sector has registered signs of liberalization. The general distrust in securities favors investments in physical assets like paintings, antiques and antiquities. Finally, the high level of import taxes and duties – amounting to a whopping 24,02 % on CIF (cost + insurance + freight) for an oil painting – will encourage trades within tax-free zones.

The key subjective factor, the propensity of users' to turn to such facilities to carry on their businesses, is difficult to assess. The challenge for the proponents of "Singapore Freeport like" facilities is to create a high level of trust in their ability to protect confidential information. The level of confidentiality that users expect is the one observed at similar facilities around the globe. It is therefore certain that protection of data such as ownership and value will be of paramount importance.

A tax-free multi-service platforms dedicated to works of the visual arts is the ultimate trading place. It offers a safe, private and convenient one-stop shopping to all parties interested in investing in works of art. During the last decade, consumption of works of the visual arts has grown exponentially in Asia. A reputable operator enjoying a favorable regulatory framework and managing a secure facility for both users and valuables shall therefore have more than a fighting chance at replicating the success story of the Singapore Freeport.

東尼 · 雷納德

新加坡自由港房地產管理有限公司主席

東尼 · 雷納德 (Tony REYNARD) 畢業自賓州大學 (University of Pennsylvania) 和史丹佛法學院 (Stanford law schools) 的研究所，並取得日內瓦大學 (University of Geneva) 法律及科學雙碩士學位。

他曾在瑞士日內瓦執業，提供法律諮詢服務，服務對象包含藝術品經銷商、拍賣公司、收藏家、藝術專家、藝術品保險公司、博物館館長以及藝術品物流公司。

東尼目前是新加坡自由港房地產有限公司 (Singapore Freeport Real Estate Pte Ltd) 以及自由港管理有限公司 (Freeport Management Pte Ltd) 的負責人，兩間公司分別持有以及管理新加坡自由港 (The Singapore Freeport)。他亦主導上海和北京自由港籌建的協商工作，現居住於新加坡。



Tony REYNARD

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Tony REYNARD holds a Master of Laws and a Master of Science from the University of Geneva.

He also holds graduate degrees from both The University of Pennsylvania and Stanford law schools.

Tony practiced law in Geneva, Switzerland, where he inter alia advised art dealers, auction houses, collectors, experts, insurers, museum curators, and logistic companies.

Tony chairs both The Singapore Freeport Real Estate Pte Ltd and Freeport Management Pte Ltd, the companies that respectively owns and manages The Singapore Freeport. He is in charge of negotiations to establish Freeports in Shanghai and Beijing. He lives in Singapore.



企業藝術經濟力

Art Works—— 德意志銀行的全球藝術計劃

弗理德海姆·胡特

德意志銀行企業公民責任部全球藝術策略負責人

自 1979 年開始的當代藝術參與

藝術對一切提出疑問。它激發我們有更多想像以塑造未來，同時也鼓舞人類開拓新視野，使我們更樂於接受特立獨行的事物和創新的思維。而這也是德意志銀行 30 多年來的文化參與，始終以藝術做為其關注、投入核心的原因。

在企業公民責任的組織架構下，秉持著「Art Works」的宗旨，德意志銀行透過工作場所、國際展覽、德意志銀行美術館 (Deutsche Bank KunstHalle) 以及教育方案，提供員工、客戶和一般大眾更多接觸當代藝術的管道，而其中諸如與博物館、藝術博覽會、新興藝術家獎項等國際夥伴的專案合作，亦讓這些管道更加豐富、多元。而隨著一連串的推廣活動，藝術雜誌「ArtMag」也應運而生，該雜誌在線上發行十多年後，現在也提供印刷的實體版本。此外，手機應用程式 (apps) 的開發，使藉由智慧型手機開拓收藏品成為一種可能。這些經由專業團隊所設計的廣泛性全球活動，使得愈來愈多的人能接觸到當代藝術。

沒有檔期的展覽：德意志銀行的藝術收藏 德意志銀行 95% 的藝術收藏展 示在工作場所及展覽當中

這種展示的概念，使藝術品得以妝點於每一層樓，且不僅僅行政辦公室，這種革命性的展示方式，讓文化資本同時惠及每一位員工。時至今日，德意志銀行的收藏較以往更富有國際性。在過去三十年裡，參觀

者已經可以在德意志辦公室、會議室、走廊和各當地分行欣賞當代藝術品。

該集團位於法蘭克福的總公司於 1986 年起，即開始向大眾呈現藝術。此後，德意志銀行便一直是全球規模最大的企業藝術收藏單位。此外，這些收藏還展示在全球各大金融中心的德銀分行，像是香港、倫敦、紐約、柏林、米蘭、孟買、新加坡、雪梨、東京和蘇黎世等地。

德銀致力於收藏攝影和紙上作品 (works on paper) 直至今日。藝術家經常透過紙張反映原創概念，隨手紀錄想法 – 像是草圖、概念或是一只草案。當代藝術的未來指向，往往會被社會承認後才期待其發展。而藝術品中的「草稿元素」則是德銀收藏的重要推力。

當代藝術展示於遍佈全球超過 900 間的 德意志銀行

1945 年是德意志銀行收藏藝術的開始。最初，德銀決定購買德國當代藝術，是基於鼓勵青年以及那些探索自我未來的人。除了購買約瑟夫·波依斯 (Joseph Beuys)、格哈德·里希特 (Gerhard Richter)、希格瑪·波爾克 (Sigmar Polke) 的作品，藉以建構這些創作者完整的收藏體系，德銀也注重藝術家早期的職業生涯。攝影藝術家托馬斯魯夫 (Thomas Ruff) 和安德列亞斯·葛斯基 (Andreas Gursky) 的作品都是在他們聲名大噪之前就被典藏，尼奧·勞赫 (Neo Rauch) 以及其他新萊比錫畫派的藝術家也是如此。

德銀的藝術收藏品來自世界各地的藝術家，時至今日愈顯完善而豐富。普普藝術（Pop Art）、日本攝影、英國青年藝術家（Young British artists）的作品，伴隨著 1945 年戰後藝術重要風格與運動的作品，如今都已是收藏的一部份。配合德意志銀行的業務全球化，藝術藏品趨勢逐漸呈現了南歐、東歐、非洲、中國、印度和南美的新藝術形式，而該藝術類型在全球文化中也愈顯重要。

德意志銀行的藝術計劃秉持著「Art works」的信念－藝術豐富人生並帶給我們新的視野和生活領域

這些藝術收藏品不僅僅只帶給公司內部員工影響，德意志銀行提供了一個平台，使藝術盡可能地分享給更多人。該收藏計劃的導覽指引推出了“ArtMag”藝術誌，民眾可以在線上訂購，以瀏覽參觀巡回展覽和藝術博覽會，或是參與藝術會談。這些由藝術家、策展人、藝評所舉行的座談通常舉辦在柏林、倫敦和紐約的德銀辦事處。光在 2012 年，就有六萬名藝術愛好者參與德銀所提供的藝術教育計畫。

全球性：德意志銀行的藝術

德銀不斷擴展其藝術藏品的國際藝術版圖，近十幾年來已相當可觀。隨著非洲、亞洲、中東和南美新興經濟體和金融中心的出現，德銀所關注的焦點轉移到這些文化中生機蓬勃的藝術圈、獨特的傳統背景文化、興趣和表現形式。關於藝術家的開放式談話，以及具有反映當地社會現實和文化的獨特見解之作品，

使得藝術家能夠成為國際關注的焦點。這樣的發展反映了德意志銀行在收藏上的全球性，以及德意志銀行創新的藝術理念。

法蘭克福（Frankfurt am Main）的集團總部是德意志銀行全球性業務以及致力於推廣藝術的核心。現代化的建築外觀，每層樓都選定一位藝術家為妝點主題：A 棟作品主要是德國和歐洲的藝術家，B 棟則是來自於歐洲、美洲和亞洲的藝術家作品。

其中令人驚訝的是，其中可以發現一些目前為止幾乎未被藝術圈所關注的地區，以及在 1980 年代中期之後出生的年輕藝術家之作品。藉由這些紙上作品和攝影，這樣的展示概括介紹了當今的國際藝壇和有關當代藝術家所需面對的廣泛議題：包括全球化和移民、傳統性別角色和現代藝術的遺址所帶來的影響之關鍵調查。

透過”年度藝術家”（Artist of the Year）獎項培育國際青年藝術家

聚焦於年輕藝術家的”年度藝術家”（Artist of the Year）獎項是致力於培養未來具發展潛力的當前年輕藝術家。其目的在於讓更廣大的民眾能參與新興藝術。這也是為什麼銀行如此支持有前途的國際藝術家－他們用自己獨特的方式去詮釋、解決社會議題。德銀將重點放在專注在紙上創作和攝影的藝術家－這是德意志銀行收藏的兩個主要領域。不同於其他獎項，”年度藝術家”（Artist of the Year）不單單

純粹提供獎金，而是與德銀藝術計劃緊密地結合。其中最誘人的獎勵在於提供得獎者於柏林的德銀藝術館（Deutsche Bank KunstHalle）舉辦一場大型個展的機會以及在其他國際場合中展示。此外，還有一連串的活動和教育方案以支持展出。獲獎的藝術家還另外被邀請創作新的系列作品。而該系列作品將由德意志銀行收藏計劃所購藏。

該獎項由四位國際知名策展人—奧奎 恩維佐（Okwui Enwezor）、侯瀚如（Hou Hanru）、伍德基得曼（Udo Kittelmann）和維多利亞 努斯霍恩（Victoria Noorthoorn）所組成的全球藝術諮詢委員會（Global Art Advisory Council）來評選得者。代理主席是德銀集團執行委員會的成員—史蒂芬 克勞澤（Stefan Krause）。

該獎項於 2010 年開辦，由瓦格希 姆圖（Wangechi Mutu）被評選為第一屆“年度藝術家”（Artist of the Year）。身為一位於紐約成長的肯亞裔藝術家，他以複雜的拼貼和裝置質疑人們對於他者、外來者的定義。2011 年的年度藝術家—巴拉達（Yto Barrada）藝術創作在探討世界各州經濟和政治邊界對生活的影響。緊接著在德意志與古根漢合作開幕會中展出了“巴拉達：即興”（Yto Barrada：Riffs）並到世界巡演，包括布魯塞爾、芝加哥、伯明罕、溫特圖爾。

2012 年的年度藝術家—羅曼 昂達克（Roman Ondák），他的作品多質疑我們日常生活的感知與感官、仔細地感受並評定人們觀看藝術的方式，以及藝

術在生命中扮演什麼樣的角色，又或是生命對藝術的影響。對昂達克而言，紙張以及攝影是主要發展想法與概念的主要媒介。2013 年，該獎項則是由巴基斯坦（Pakistani）重要的藝術家凱瑞西（Imran Qureshi）所拿下，他使用家鄉有百年歷史的微型彩繪呈現出相當當代的藝術表現形式—除了在微小紙張上繪畫，他也在裝置上創作—包含了整棟建築的外觀。獲得該獎項的藝術家，同時也體現了他們在紙上創作的作品之重要性。

開放大眾參觀柏林德意志銀行藝術館

拓荒精神、國際主義、開放性，該藝術館代表著不同於德意志銀行對藝術信念的一切事物。同時，它也是對柏林作為藝術大都市的一種致敬。1997 年開始，德意志銀行與古根漢基金會合作經營畫廊空間至今 15 年，該空間位於德意志銀行柏林的總部，如今已確立自身在國際當代藝術作為一個平台的地位，並從 2013 年 4 月開始在新的條件下由德銀持續經營。藝術館被視為一個挖掘新事物的場域，就像德國本身一樣充滿活力。

兼具了當地與全球藝術作品，藝術館展出德國具才華藝術家的作品，並提供非洲、中國、印度和南美當今的藝術家首展的平台。展館也與全球機構網絡合作，包括倫敦的泰德（Tate）。為了探究當前當代藝術的題材，藝術館邀請國際策展人和藝術家針對柏林作實驗創新計劃。主要的展覽重點仍在德意志銀行的收藏，透過不同策展人的角度，這些藏品不斷以不一

樣的經驗被展示。另一個焦點則是大型的“年度藝術家”各展計劃。此外，藝術館每年都與柏林當地藝術機構密切合作舉辦年展。

精采的開端：塑造藝術 (MACHT KUNST) 調動柏林藝術世界

僅僅 48 小時就湧入超過 1 萬 2 千名參觀者，提出申請的作品高達 2135 件。

柏林是藝術世界的實驗室。由於其創意力和開放的風氣，該城市比起其他大都市吸引了更多藝術家以及才華洋溢的年輕人。作為柏林的藝術機構，德意志藝術館提供一個平台給予這樣具潛力的計劃作首展—獨特的塑造藝術 (MACHT KUNST) (即 Make Art) 計劃。

2013 年 4 月，在藝術館正式開幕前，藝術家和藝術愛好者在這裡做了一場 24 小時的展覽。獎品包括將工作室出讓給人氣獎得主，以及另外三個評審獎—包括在藝術館的工作室中作為期兩週的個展展演。民眾的熱烈響應使德意志銀行在 Alte Münze 舉辦了二次展出。根據藝術館參與式的做法，開放給各式各樣的藝術形式和廣大的群眾參與，使塑造藝術 (MACHT KUNST) 展演相當成功。

自從 1982 年的巡迴展演：德意志銀行的收藏展

在德銀的藝術活動中，其中一個重要的面向即是文化的交流和社會議題的參與。1982 年開始，遊客已有機會能欣賞德銀第一手藏品。德銀的藏品往往在世界巡展、作為國際博物館租借、德銀所舉辦之主題性展演或個展。2013 年的”薩克森” (Saxony) 就是這樣的一檔展覽。萊比錫造形藝術博物館 (Museum der bildenden Künste Leipzig) 的展覽紀錄了撒克遜 (Saxon) 藝壇的活力和藏品歷史的篇章。此外，2013 年於多特蒙市 (Dortmund) 東城牆博物館 (Museum Ostwall) 的”城市觀” (City in View) 展覽，展示了國際藝術家從現代主義發展至今所體驗的都市生活之變化。

公眾接觸

創新的策展理念是讓當地民眾對藝術產生興趣的先決條件。例如，”Beuys and Beyond Teaching as Art” 已在六個拉丁美洲藝術機構展出，並擁有超過 20 萬的觀眾。該檔展覽作品來自於博伊斯 (Beuys) 以及他的學生，作品帶領觀眾進入各國當代位置的對話關係。同時，該展描繪了不同能促進創意潛能和藝術發展的面向。“More than Meets the Eye” (2006/2007) 和 “Return of the Giants,” 攝影展以具像的德國繪畫 (2003/2004) 為特色，而這是德銀藏品在拉丁美洲的第三檔巡迴展。2014 年”國際攝影里程碑—安德列斯·古爾斯基到柳美和 (Andreas Gursky to Miwa

Yanagi) ”將至亞太地區的博物館與藝文機構巡迴展出三年之久，展出 1945 年已來至今的傑作。

藝術跨越藩籬，鼓舞團隊合作 全球社會對於當代藝術的支持

只要是德意志銀行營運所及，其對文化的支持無處不在。而如此可見的藝術版圖，都是德銀與愈來愈多的國際藝文機構合作所建立的網絡。德意志銀行還贊助惠特尼博物館 (Whitney Museum) 在紐約的雙年展以及加州橙縣美術館的加州太平洋三年展 (California-Pacific Triennial)。多年來，德銀不斷贊助藝術博覽會，諸如馬斯垂克歐洲藝術博覽會 (TEFAF Maastricht) 和倫敦佛列茲藝術博覽會 (Frieze Art Fair)。另外，兩個新的佛列茲博覽姐妹會 – 佛列茲大師展 (Frieze Masters) 和佛列茲紐約展 (Frieze New York) – 也像佛列茲藝術博覽會 (Frieze Art Fair) 一樣受到贊助。就此，銀行對藝術市場解析，以提供世界各地的客戶做專業諮詢的服務。

這項激起兒童與青年對當代藝術熱情的計劃在這些合作中發揮著特殊的作用。因此，在“魯爾 2010- 歐洲文化之都”計劃的框架之下，德意志銀行所贊助的“Collection Tours”擁有超過 2 萬的兒童、青年與成人體驗當代藝術。在雪梨，德意志銀行是為博物館教育合作的夥伴 – 即當代藝術推廣至兒童、青年之計畫。此外，德銀也使展覽計畫得以順利展出，包含安尼詩·卡普爾 (Anish Kapoor) 首次在澳洲全面性的展演。

法蘭克福施泰德博物館 (Städel Museum) 擁有來自德意志銀行收藏的 600 件名作

德意志銀行基金會已贊助法蘭克福 Portikus 展覽館超過十年以上。此外，銀行也與施泰德博物館 (Städel Museum) 保有特別穩固的聯繫。2011 年，德意志銀行將 600 件藏品給予施泰德作為長期租借。這些來自德國藝術家的作品包含巴塞利茲 (Georg Baselitz)、馬丁·吉本貝格 (Martin Kippenberger)、尼奧·勞赫 (Neo Rauch)、里希特 (Gerhard Richter) 和特洛柯爾 (Rosemarie Trockel)，讓博物館的典藏更為完善。

羅馬之家獎 (Villa Romana Prize) 不僅僅是德國歷史最悠久的獎項，也是德意志銀行對文化長久以來的承諾。自 1929 年起，德銀便已贊助這項著名的獎項，提供獲獎藝術家補助、使之生活無虞並在羅馬藝術家創作。

1993 年以來，德意志銀行的獎項已使超過 120 位具有創意的青年受益，而這是另一件關於德銀對藝術承諾成功的故事。該獎項則與英國著名藝術院校所合作。在華沙 (Warsaw) ”瀏覽獎 (Views) ”由德意志銀行藝術基金會與華沙國家畫廊 (Zacheta National Gallery) 聯合頒發，為年輕的波蘭藝壇注入一股活力。該獎項從 2003 年起每兩年頒發一次，時至今日在年輕的波蘭藝壇已是最負盛名的藝術獎項。



The Value of Arts for Business and Institutes

Art Works – The Global Art Program by Deutsche Bank

Friedhelm HÜTTE

Global Head of Art of Corporate Citizenship, Deutsche Bank AG

Involvement in contemporary art since 1979

Art questions. It spawns new ideas for shaping our future. It inspires people, opens up new perspectives, and thus enables them to embrace unusual and innovative approaches. That is why Deutsche Bank's commitment to art has been a focus of its cultural activities for more than 30 years.

Within the framework of its Corporate Citizenship program under the motto "Art works," Deutsche Bank offers employees, clients and the general public access to contemporary art—through its collection at the workplace, in international exhibitions, at the Deutsche Bank KunstHalle, as well as through educational programs.

These offers are supplemented by cooperative projects with international partners such as museums and art fairs, as well as awards that promote promising talent. The magazine ArtMag accompanies these activities. It has done so for more than ten years online and now there is also a print edition. Furthermore, special apps make it possible to explore the collection on a Smart Phone. These extensive global activities—designed by a team of experts—enable increasing numbers of people to engage with contemporary art.

Always present: The Deutsche Bank Collection 95% of the collection accessible at the workplace or in exhibitions

The idea to display stimulating artworks on all floors, rather than just the executive suites, was

revolutionary, cultural capital benefiting every employee. Today, the Deutsche Bank Collection has more of an international presence than ever before. For over three decades, visitors have found contemporary art in Deutsche's offices, conference rooms, hallways, and local branches.

At its Group Head Office in Frankfurt, the bank started presenting art to the public in 1986. Since then, the Deutsche Bank Towers have been pivotal to one of the world's largest corporate art collections. Furthermore, the collection is displayed at the bank's premises in global financial centers around the world such as Hong Kong, London and New York, with other highlights from the collection in Berlin, Milan, Mumbai, Singapore, Sydney, Tokyo, and Zurich.

Concentrating on works on paper and photography, the collection is devoted entirely to the present. Artists capture an idea on paper—as a sketch, a concept, or a first draft. Contemporary art points towards the future, often anticipating developments before they are acknowledged by society. This "draft character" of art is an important impetus for the Deutsche Bank Collection.

Contemporary art in more than 900 Deutsche Bank buildings worldwide

The starting point of the collection is 1945. From the very beginning the bank decided to buy contemporary German art, promote young talent and explore current positions. In addition to building up bodies of works by Joseph Beuys, Gerhard Richter, and Sigmar Polke, the bank focuses on artists in the early stages of their career. Works of photographers Thomas Ruff and Andreas Gursky were acquired

before these artists ever became famous, as was the case with Neo Rauch and others from the Leipzig School. The collection is continually evolving and rejuvenated by artists from all over the world. Pop Art, Japanese photography, the Young British artists, are now all part of the collection—along with the works of all important post-1945 movements. In line with the globalization of Deutsche’s business, the collection has moved to reflect new art from southern and eastern Europe, Africa, China, India, and South America, which are becoming more and more important in a globalized culture.

“Art works,” the guiding principle of Deutsche Bank’s art program, is based on the firm belief that art enriches people and shows new perspectives and living spheres.

The collection motivates not only those within the company: Deutsche offers a platform, so that art can reach as many people as possible. On top of guided tours of the collection, the public subscribe to Art-Mag, the online magazine, visit travelling exhibitions and fairs, or participate in dialogue about art. These talks are held by artists, curators and critics at the bank’s main offices in Berlin, London and New York on a regular basis. In 2012 alone, nearly 60,000 art enthusiasts participated in art education programs offered by Deutsche Bank.

Global: Art in the Deutsche Bank Towers

The international art map has expanded considerably in recent decades. With the emergence of new economic and financial centers in Africa, Asia, the Middle East, and South America, the center of attention has shifted towards their vibrant art

scenes and unique traditions, interests, and forms of expression. An open dialogue with these artists and their works yields valuable insights into the cultures and social realities of these regions, putting the artists themselves in the international spotlight. This development is mirrored in the global nature of the Deutsche Bank Collection—and in the innovative art concept of the Deutsche Bank Towers.

The Group Head Office in Frankfurt am Main is at the heart of Deutsche Bank’s worldwide activities and its commitment to art. Following the modernization of the building, each floor is now dedicated to one selected artist: Tower A presents artists from Germany and Europe, Tower B those from Africa, America, and Asia.

There are surprising new discoveries from regions which until now have hardly been noticed by the art world. And the youngest artists were born only in the mid-1980s. With a focus on works on paper and photography, the display gives an overview of today’s international art scene and the wide range of issues that today’s contemporary artists embrace: critical investigations of the consequences of globalization and migration, traditional gender roles, and the legacy of modern art.

A very special award: “Artist of the Year”

Promoting young international artists

Spotlight on young art: The “Artist of the Year” award is devoted to current trends that point to the future. The aim is to introduce the broader public to engaging new artistic positions. This is why the bank supports promising international artists who address social issues in their own, unique way.

There is an emphasis on artists who concentrate on the media of paper and photography in their work—the two main areas of focus of the Deutsche Bank Collection. Unlike many other prizes, “Artist of the Year” is not purely a financial award, but is firmly embedded in Deutsche Bank’s art program. The high point is a large solo exhibition at the Deutsche Bank KunstHalle in Berlin which then travels to other international venues. In addition, there is a catalogue and an educational program to support the exhibition. The artist is invited to create a special edition. And a range of the artist’s works is acquired for the Deutsche Bank Collection.

The selection of the “Artist of the Year” is based on the recommendation of the Global Art Advisory Council, a committee consisting of four internationally renowned curators—Okwui Enwezor, Hou Hanru, Udo Kittelmann, and Victoria Noorthoorn. The acting chairman is Stefan Krause, member of the bank’s Group Executive Committee.

The award was initiated in 2010, when Wangechi Mutu was selected as the first “Artist of the Year.” The complex collages and installations of the New York-based Kenyan artist question our image of

the other, of what is foreign. Yto Barrada, the “Artist of the Year” 2011, investigates the economic and political borders that impact life between the continents. Following its premiere at the Deutsche Guggenheim, the show “Yto Barrada: Riffs” went on a world tour. It was shown in Brussels, Chicago, Birmingham, and Winterthur.

Roman Ondák, the “Artist of the Year” 2012, questions our everyday experiences and perceptions, critically examining the way in which we view art and evaluate it, what role art can play in life, or life in

art. For Ondák, paper and photography serve as the main media for developing his ideas and concepts. In 2013, one of the most important Pakistani artists received the award: Imran Qureshi uses the centuries-old miniature painting of his home country as a very contemporary means of expression— for small works on paper and for painting installations that can encompass entire buildings. All of the artists who receive the distinction also demonstrate the importance of work on paper in current artistic production.

Open to everyone: The Deutsche Bank KunstHalle in Berlin

Pioneer spirit, internationalism, openness: The KunstHalle stands for everything distinguishing Deutsche Bank’s commitment to art. At the same time, it is a tribute to Berlin as an art metropolis. Starting in 1997, Deutsche Bank had operated the gallery space together with the Solomon R. Guggenheim Foundation for 15 years. The exhibition hall in Deutsche Bank’s Berlin headquarters, which had established itself as a platform for international contemporary art, has been continued by Deutsche Bank under new conditions since April 2013. The KunstHalle is conceived as a place for discoveries, as an institution that is as lively and dynamic as the German capital itself.

Local and global: The KunstHalle features talented international artists in Berlin and serves as a forum for current artists from Africa, China, India, and South America, who are presented to a broad public for the first time. The exhibition hall cooperates with a worldwide network of institutions,

including the Tate in London. In order to investigate current themes of contemporary art, the KunstHalle invites international curators and artists to realize innovative projects in Berlin. The main focus of the exhibitions is the Deutsche Bank Collection, which can be continually experienced anew due to the different perspectives of the curators. Another highlight of the program is a large solo exhibition devoted to the “Artist of the Year.” In addition, the KunstHalle presents an annual show developed in close cooperation with a Berlin art institution.

A terrific beginning MACHT KUNST mobilizes the Berlin art world

**More than 12,000 visitors in only 48 hours
2,135 works submitted**

Berlin is a laboratory for the art world. Due to its creative and open atmosphere, the city attracts more artists and young talents than almost any other metropolis. As a Berlin institution, the Deutsche Bank KunstHalle offered a platform for this potential for the first time – with the unique MACHT KUNST (Make Art) event.

In April 2013, before the official opening of the KunstHalle, artists and art enthusiasts were encouraged to present their works here in a 24-hour exhibition. The prizes included a studio grant for the audience favorite and three jury prizes, consisting of a two-week solo exhibition in the KunstHalle’s studio. The response was so big that Deutsche Bank organized a second exhibition in the Alte Münze. The huge success of MACHT KUNST underlines the

participatory approach of the KunstHalle, which is open to all kinds of art forms and a wide public.

On tour since 1982: Exhibitions from Deutsche Bank’s Collection

One important aspect of the bank’s art activities is cultural exchange and the desire to engage with social issues. Since 1982, visitors have been able to experience works from the corporate collection first hand. The works in the collection are often on tour, on loan to international museums or shown in numerous thematic and solo exhibitions organized by the bank. One such show was the “Saxony” exhibition in 2013. The show at the Museum der bildenden Künste Leipzig documented the vitality of the Saxon art scene and a chapter of collecting history. Also in 2013, the exhibition “City in View” at the Museum Ostwall in Dortmund showed how international artists from the age of Modernism to the present day see urban life.

Reaching the public

Innovative curatorial concepts are a prerequisite to getting local audiences excited about art. For instance, “Beuys and Beyond Teaching as Art,” which was on view at six Latin American institutions and was seen by more than 200,000 people. The exhibition built on works by Beuys and his students, which enter into dialogue with contemporary positions from the guest countries. At the same time, the shows illustrated different models for promoting creative potential and artistic development. Following on from the photographic exhibition “More than Meets the Eye” (2006/2007) and “Return of the Giants,” which featured figurative German painting

[2003/2004], this was the third exhibition from the collection to tour in Latin America.

From 2014, the exhibition “Milestones in International Photography – Andreas Gursky to Miwa Yanagi” will tour museums and institutions throughout the Asia-Pacific region for three years, showing masterpieces from 1945 up to the present day.

Art transcends borders: Inspiring teamwork Worldwide support of contemporary art

Deutsche Bank supports cultural life everywhere it operates. In the area of art, it is joining forces with a growing network of international partners. Deutsche sponsors the Biennial in New York’s Whitney Museum and the California-Pacific Triennial in the Orange County Museum of Art in California. For years now, it has been present at art fairs such as the TEFAF Maastricht and the Frieze Art Fair in London. In addition, the two new Frieze fairs—Frieze Masters in London and Frieze New York—are supported by the bank as main sponsor. Here, the bank takes an analytical look at the art market to offer specialized consultancy services to clients around the world.

Projects that arouse children’s and young people’s enthusiasm for contemporary art play a special role in these collaborations. Thus, within the framework of European Cultural Capital RUHR.2010, Deutsche Bank supported the innovative “Collection Tours,” which enabled more than 20,000 children, teenagers and adults to experience contemporary art. In Sydney, Deutsche Bank is an “education partner” of the Museum of Contemporary Art’s am-

bitious children and youth program. Furthermore, it enables exhibition projects to be staged, including the first comprehensive Anish Kapoor show in Australia.

600 masterpieces from the Deutsche Bank Collection at the Städel Museum in Frankfurt

Deutsche Bank Foundation has supported the Portikus exhibition hall for more than a decade. In addition, the bank enjoys a particularly strong relationship with the Städel Museum. In 2011, Deutsche gave the Städel 600 masterpieces from the Deutsche Bank Collection on permanent loan. Works by German artists including Georg Baselitz, Martin Kippenberger, Neo Rauch, Gerhard Richter, and Rosemarie Trockel perfectly supplement the museum’s collection.

The Villa Romana Prize is not only the oldest German art award, but also Deutsche Bank’s longest-standing cultural commitment. Since 1929, the bank has sponsored this renowned award, which provides artists with grants and enables them to live and work in the Villa Romana artists’ house.

The Deutsche Bank Awards, from which more than 120 young creative people have benefited since 1993, is another success story of the bank’s commitment to art. The awards are granted in cooperation with the leading British art academies.

In Warsaw, the “Views” prize, jointly awarded by Deutsche Bank Foundation and the Zacheta National Gallery, gives impetus to the young Polish art scene. The prize has been awarded biannually since 2003 and today is the most renowned award for young Polish art.

弗理德海姆·胡特

德意志銀行企業公民責任部 全球藝術策略負責人

弗理德海姆·胡特先生為德意志銀行企業公民責任部全球藝術策略負責人。擁有藝術史、文學、新聞傳播背景，自1986年起任職於德意志銀行法蘭克福總部，作為德意志銀行全球藝術策略的軍師，弗理德海姆·胡特負責監督德意志銀行的典藏計畫、德意志銀行美術館的營運，及策畫德意志銀行多項展覽和贊助計畫。此外，也負責多本畫冊的編輯和出版，並為知名藝術刊物撰稿。

弗理德海姆·胡特 (Friedhelm Hütte) 近年策劃的展覽包括：

《目光之外 - 德意志銀行攝影藝術收藏展》(More than Meets the Eye - Photographic Art from the Deutsche Bank Collection)，在拉丁美洲六國巡迴展出。

《蔡國強 - 撞牆》(Cai Guo-Qiang - Head On)，德國古根漢美術館 (Deutsche Guggenheim Museum, Berlin)。

《柳美和 個展》(Miwa Yanagi)，美國紐約雀兒喜美術館 (Chelsea Art Museum) 和休士頓美術館 (Museum of Fine Arts, Houston)。

《超越波伊斯 - 當教育做為一門藝術》(Beuys and Beyond - Teaching as Art)，拉丁美洲。

《伊梅克努伯 個展》(Imi Knoebel)，荷蘭海牙市立博物館 (Gemeentemuseum Den Haag)。

德意志銀行年度藝術家 (Deutsche Bank's Artist of the Year) 展覽：

2010年 “Wangechi Mutu: My Dirty little Heaven”

2011年 “Yto Barrada Riffs”

2012年 “Roman Ondák: do not walk outside this area”

2013年 “Imran Qureshi”

Friedhelm HÜTTE

Global Head of Art of Corporate Citizenship, Deutsche Bank AG

Friedhelm HÜTTE studied in Art History, Literature, Journalism and Communication Studies at Ruhr-Universität Bochum from 1979 to 1984. Since 1986, he has worked in Deutsche Bank AG, Frankfurt am Main. As Global Head of Deutsche Bank Art, Friedhelm Hütte oversees the Deutsche Bank Collection, Deutsche Bank KunstHalle as well as all exhibitions and sponsoring projects. He has edited and published numerous catalogues and written articles for leading art publications.

In recent years, the exhibitions he has curated include “More than Meets the Eye – Photographic Art from the Deutsche Bank Collection”, a touring exhibition with venues in six Latin American countries; “Cai Guo-Qiang – Head On” at the Deutsche Guggenheim, Berlin; “Miwa Yanagi” at the Chelsea Art Museum and the Museum of Fine Arts, Houston; “Beuys and Beyond – Teaching as Art” (Latin America); “Imi Knoebel” at the

Gemeentemuseum, The Hague; as well as Deutsche Bank’s Artist of the Year exhibitions “Wangechi Mutu: My Dirty little Heaven” in 2010, “Yto Barrada Riffs” in 2011 and “Roman Ondák: do not walk outside this area” in 2012 and “Imran Qureshi” in 2013.

劉奕成

英商巴克萊銀行台北分行投資銀行部董事總經理

劉奕成先生現為英商巴克萊銀行董事總經理。畢業於美國賓州大學華頓商學院 MBA、台灣大學工管系。歷來的工作與金融密切相關，先後任職於悠遊卡公司董事長、JPMorgan 投資銀行副總裁、國泰金控副總經理、國泰世華銀行風控長、消金與企金執行長。曾在台北紐約東京香港上海哈拉雷工作，造訪過大聯盟 31 個主場。電影海角七號、台北二一資金贊助人。數位時代等三本雜誌專欄作家。

學歷

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經歷

悠遊卡控股(股)公司董事長

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國泰金控副總經理

國泰世華銀行企金執行長、消金執行長、風控長

JP 摩根投資銀行副總裁(紐約/香港)



I-Cheng LIU

Managing Director of Investment Banking of
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Mr. I-Cheng LIU is currently the Managing Director of Barclays Bank British companies. Graduated from the University of Pennsylvania Wharton School MBA, National Taiwan University Department of Business Administration. His work has always been closely associated with the financial and has worked in the EASYCARD company as Chairman, JP Morgan Investment Bank Bank Vice President, Cathay Financial Holdings Vice President, Cathay United Bank Chief Risk, Consumer Banking and Corporate Banking Executive. He has also worked in New York, Tokyo, Taipei, Hong Kong, Shanghai, Harare, and visited 31 major league home. He is the funds patron of film Cape No. 7 and magazine Taipei 21, and also the columnist of The Digital Age and other three magazines.

Education

MBA, University of Pennsylvania Wharton School
National Taiwan University Department of Business Administration

Work Experience

EASYCARD Holding Company, Chairman
EASYCARD Holding Company, Chairman
Cathay Financial Vice President
Cathay United Bank, corporate banking executive officer, consumer banking executive officer, Chief Risk
JP Morgan Investment Bank Vice President (New York/Hong Kong)



ArtPP—— 藝術市場的數位行銷與統計分析

石隆盛

台北藝術產經研究室執行長

視覺藝術展覽之行銷宣傳，普遍上仍倚賴傳統平面雜誌的廣告、DM、以及電子郵件、社群網站等。而觀眾在接收這些大量的展覽訊息時，是混雜的、無法分類及有效管理。且除了社群網站外，畫廊亦無法確切掌握訊息是否已被閱讀？那些人對自己的展覽訊息感興趣？而我們在進行不同藝術類型的展覽檔次、地區分部、觀眾喜好、年齡與職業等統計時，同樣困難重重、窒礙難行。如何建構一個平台，讓不同使用者各取所需，有效進行訊息的傳達與統計，是本計畫主要探討的課題和目的。

隨著「智慧型手機」與「平板電腦」的普及，以及手機應用程式（App）的功能越來越多，改變社會大眾接受與使用資訊的習慣，成為各行業新興的行銷工具。

然而，一來行動 App 的開發成本所費不貲，並不是弱勢的視覺藝術團體和機構所能負擔；二來眾多的 App 不斷推陳出新的競爭下，如何吸引擁有行動載具的使用者下載？內容如何能夠不斷更新、累積，好留住用戶？等等都是行動 App 能否成功的關鍵，也只有受歡迎的行動 App 才具有「行銷的效益」。

本計畫試圖建立視覺藝術展覽行銷的行動 App 的開放平台，提供視覺藝術團體、美術館、藝文空間、畫廊、拍賣公司等舉辦各種展覽活動的宣傳行銷管道。

一方面解決各團體因經費短缺無力導入最新行銷技術的問題，一方面避免各自開發造成資源與經費上的浪費；並期望藉此平台的普及化，建立觀眾的行為分析系統，讓視覺藝術團體和機構掌握觀眾的反饋分析與統計。



ArtPP: Digital Marketing & Statistical Analysis for Art Market

Long-Sheng SHIH

Executive Director of Taipei Art Economy Research Centre

Marketing and promotion for visual arts exhibition, generally still rely on traditional magazine advertising, DM, e-mail, as well as social network sites and so on. The audience received a large number of exhibition messages, they are mixed and can not be classified and managed effectively. And in addition to social network sites, the gallery will not be able to grasp exactly whether the message has been read? Those people who were interested in their message of exhibition? And while we are doing some statistics from different types of art exhibitions, geographical segments, the audience preferences, age, occupation, the mixed messages makes it difficult to implement. How to build a platform to serve different needs from users and to convey the message and collect the statistics effectively is the topic and purpose of this project.

With the popularity of “smart phone” and “tablet”, as well as the functional mobile application (App), the public acceptances’ habits of information using has been changed, and its also become the emerging marketing tool in different industries.

First, the development of mobile App costs a lot of funds, not weak visual arts groups and institutions

could afford; secondly, as the competition from continuous introduction of numerous App, how to attract users? How to update content constantly, making accumulation, then retain the customers? So are the key to action App’s success, and only the popular action APP has the “marketing effectiveness.”

This project attempts to establish an open platform of visual art exhibitions marketing actions App, providing visual arts groups, museums, galleries, auction houses a marketing channels to conduct various exhibition activities.

To sum up, on the one hand, to solve the funding shortage of various groups and to deal with the problem of inability to import the latest marketing technical . On another hand, to avoid the waste on resources and funding by respective development. Expecting through this way to make the popularity of this platform, and establish the audience’s behavior analysis system for the visual arts groups and institutions to grasp the audience’s feedback analysis and statistics.



石隆盛

台北藝術產經研究室執行長

石隆盛先生為現任中華民國畫廊協會附設台北藝術產經研究室執行長，已從事多年當代藝術環境及市場領域的觀察研究，曾任中華民國畫廊協會秘書長，並參與文化部多項關於視覺藝術的產業調查與政策研究計畫。



Long-Sheng SHIH

Executive Director of Taipei Art Economy Research Centre

Currently serves as the Executive Director of Taiwan Art Gallery Association Taipei Art Economy Research Centre, Mr. Long-Sheng SHIH specializes in the research regarding the environment and market of contemporary art. As the former secretary-general of Taiwan Art Gallery Association, he has participated in several project of Ministry of Culture on reports and researches about industrial observation, data collecting and policy suggestions.



亞洲價值 專題座談



Asian Value

Panel Discussion



長谷川智惠子

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學歷

日本聖心女子大學

經歷

日本日動畫廊副社長

日本笠間日動美術館副總監

第八任日本藝術商聯會主席

獲獎

1979 法國藝術及文學勳章騎士勳位

1987 法國國家典範騎士勳章

1995 法國國家榮譽軍團勳章騎士勳位

2009 法國國家榮譽軍團勳章軍官勳位

Chieko HASEGAWA

Vice-President of galerie nichido

Education

Studied at Sacred Heart University, Tokyo, Japan and left it halfway in dec.1964, to be married to Tokushichi Hasegawa, present president of Galerie Nichido.

Occupation

Vice- president of galerie nichido since January, 1990

Vice-director of Kasama Nichido Museum of Art, Ibaraki, Japan since 1972

8th Chairman of Japan Fine Arts Dealer's League from May 1994 to April, 2008

Rewards

1979 Chevalier des Arts et Lettres from French Government

1987 Chevalier de l'ordre National du Mérite from French Government

1995 Chevalier de la Légion d'honneur from French Government

2009 Officier de la Légion d'honneur from French Government

Writings

"Un-retouched portraits of Great Masters", published by Asahi Sonorama

"Museum World Tour", published by Kyuryudo

"Museum World Tour II", Idem

"How to appearance and choose pictures", published by PHP editions

"Let's go to museums", published by Kyuryudo

"Because I am a woman, woman as I am", published by Kodansha

"Portraits of Mrs.C", published by Kyubundo

"Gareki no hateni akai hana – story of a man who gave museum to citizen of Hiroshima" published by wave editions

"Great Master of Arts", published by Kodansha



張學孔

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中華民國畫廊協會理事長 (2011-2012)

台灣當代藝術連線創辦人

PHOTO TAIPEI 創辦人

台北藝術論壇召集人 (2009-2010)

Richard CHANG

Director of Galerie Grand Siecle

Chairman, Taiwan Art Gallery Association (2011-2012)

Founder, Taiwan Contemporary Art Link

Founder, PHOTO TAIPEI

Convener, Art Taipei Forum (2009-2010)



陳韋晴

紐約 inCube Arts 藝術中心創辦人

生於台灣，英國倫敦藝術大學傳播學院行銷系畢，曾任社團法人中華民國畫廊協會企宣總監，統籌 2007 至 2010 年台北國際藝術博覽會期間，參訪多國藝文機構並執行眾多國際合作案，建立與國際畫廊、非營利藝術組織、基金會、美術館等相關機構以及國際策展人之合作關係，長期關注國際藝市發展。

現為紐約 inCube Arts 非營利藝術中心創辦人、獨立策展人、典藏雜誌社以及台北藝術產經研究室海外特約記者。曾策畫「2013 亞洲時基：新媒體藝術節－微型城市」展出於紐約皇后美術館、Stephan Stoyanov 畫廊，紐約 NARS 基金會以及 Residency Unlimited 藝術中心，「陳張莉：不止」個展於紐約伊勢藝術基金會（ISE Cultural Foundation）、「倫敦·呼喚 London

Calling」巡迴中國與台灣以及關渡美術館「Whatever It Takes」Joshua Balgos 個展…等。

文章發表於眾多華人藝術雜誌如：《典藏今藝術》、《典藏藝術與投資》、《台北藝術產經研究室電子報》、《藝術收藏 + 設計》以及《藝外雜誌》等。

現居住於紐約，以創辦 inCube Arts 非營利藝術中心建立國際藝文資源和消息開放的跨平台、跨領域、跨地域流通基地，聚集國際各領域專才策劃一連串前衛、實驗、示範的多元展演中心。將以「亞洲時基：新媒體藝術節」、「國際藝術駐村」、「新興策展人計畫」與「藝術家徵展計畫」等多面向規畫，開創亞洲與國際藝文場域交流平台。

CHEN Wei-Ching, Joanne

Founder of inCube Arts Foundation, New York

Based in New York, CHEN Wei-Ching, Joanne is an independent curator, art consultant, widely published critic, and the founder of inCube Arts, a non-profit art organization in New York City with a focus on art from Asia, South Asia and a commitment to exhibition-led enquiry. She is the former Marketing Director of Taiwan Art Gallery Association and Art Taipei from 2007 to 2010. Chen has also curated international exhibitions such as “*inToAsia: Time-based Art Festival 2013 – MicroCities*” at The Queens Museum of Art, Stephan Stoyanov Gallery, the NARS Foundation

and Residency Unlimited in New York, “*Jenny Chen: Without End*” at ISE Cultural Foundation, New York, “*London Calling*” a touring exhibition (China/Taiwan) and Joshua Balgos’ solo exhibition “*Whatever It Takes*” at the Kuandu Museum of Fine Arts. She has written and published her articles in *Art Investment*, *ARTCO*, *ARTITUDE* Magazine and *Art Taipei Forum Media*. She has written and published her articles internationally in *Art Investment*, *ARTCO*, *ARTITUDE*, *Art Collection + Design* Magazine and *Art Taipei Forum Media*.





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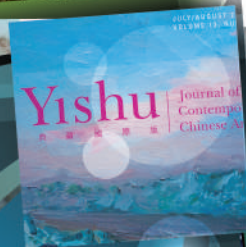
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《當代藝術新聞》關注亞洲當代藝術，以新聞速度的節奏、深入淺出的文字來剖析藝術產業種種現況，豐富多元的資訊；廣闊的視角，充分、即時地提供給世界各地關心華人藝術的每位讀者。多年來，始終堅定對於藝術產業的深入關心，因為只有良善健全的產業環境，才是整體藝術環節能夠相互滋長的最大條件。也因此，這麼多年來，見證華人藝術的產業規模逐漸在擴大，同時也慢慢看到這個產業的秩序逐步制度化，這些都是讓華人藝術產業在國際舞台擁有不容小覷影響力最佳實證。

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