

**How
(well-)known
is Italian
contemporary art
abroad?**



Quanto è (ri)conosciuta all'estero l'arte contemporanea italiana?

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Premises

In a globalized world, the concept of nationality is becoming increasingly blurred and, even in contemporary art, we encounter increasingly multifaceted realities when it comes to geographical origin and identity. Certainly, artists are not chosen by their passport for an international exhibition, but rather on the quality of their work. However, it can be observed that support for the creation and sale of art is, in most cases, linked to the artists' countries of origin or choice and depends on very often national rules and regulations. In this report, we have asked ourselves about the relative weight of Italian contemporary art in the world, which today boasts at most sporadic presences at major international events. Our survey aims to reconstruct the map of the current state, not so much to claim a presumed Italian character in contemporary art, but to analyze the functioning of a system that necessarily has cultural and economic roots in our country.

Our independent study - which is not exhaustive, but only the first step towards future in-depth studies - is based on the historic 2005 analysis carried out by Pier Luigi Sacco, Walter Santagata, and Michele Trimarchi for the Darc (Directorate General for Architecture and Contemporary Art) of the Ministry of Culture and published in the now historic text "L'arte Contemporanea italiana nel mondo" (Italian Contemporary Art in the World) published by Skira. For the analysis we have considered the last decade, addressing the visibility of Italian artists born after 1960 both at an institutional and market level, since the success of Italian art produced in the 1950s-60s-70s (Fontana, Burri, Arte Povera) is by now well established. Our research was focused on the quantitative analysis of the data collected and on the qualitative analysis of the assessments of those who, as the Italian curators, both active in Italy and abroad, have long been working with Italian artists to promote their expertise across national borders. We have thus assembled a panel of more than 20 interviews on the successes and failures of Italian art, on the limits and opportunities lost or yet to be seized to imagine a more solid international affirmation.

We believe that much can still be done to enhance the value of Italian contemporary art, but we also think that constant monitoring of the efforts made is necessary. Especially at an institutional level, to check the solidity of the results obtained, set new goals, and identify new instruments of integration into the international art system. As we know from various publications and research, the Achilles' heel of the Italian system is represented by the difficult access to the art system of those who study and graduate from high school. In the absence of revenues from the artistic activity and institutional networks in Italy (the Quadriennale in Roma is a commendable exception), young people are forced to complete their education and exhibitions abroad, where the Italian Cultural Institutes often provide support (mainly in the United Kingdom, Germany, France, the Netherlands, and the United States), in order to consolidate their skills through mentoring and discussions with critics and the public, activities in Italy are carried out almost exclusively by independent cultural centers or research galleries. Even though the European legislator has repeatedly urged the Member States to adopt the Social Statute for Artists (2006/2249) aimed at creating a "European professional register", the fragility of an under-protected and poorly paid profession remains in Italy, exacerbated by the pandemic crisis. Without this register, we do not even know the number of professional artists in Italy.



The curators: an overview

The report is divided into two parts: the first contains a series of interviews with 24 curators out of the 69 interviewed. They were asked who, in their opinion, are the Italian artists who have already achieved international prestige, who are still undervalued, and what are the limitations and potential of the Italian system.

A first insight that comes out from almost all the interviewees is that, besides the indispensable work quality and the innovation of the language of art, the international presence is gained through periods of study and work abroad: an aspect that has undoubtedly contributed to the success of Maurizio Cattelan and Rudolf Stingel and enables the artists to establish international relationships. These include the support of foreign curators and collectors, influential galleries able to foster the artist's work abroad, and national museum institutions with a reputation of international standing. Also considered of great importance, is the participation in institutional exhibitions and biennials of international importance and, at last, having developed a communication strategy, including by critics and curators, through a successful narrative. An example of this is the success of the Transavanguardia and Arte Povera movements in the past, which were rewarded by presenting themselves as a united group and movement.

According to the curators interviewed, one of the main causes of the lack of appreciation of Italian artists and the consequent gap in our country's contemporary art system is the inability to create networks at a global level, first and foremost between Italian academies, Italian contemporary art museums and their foreign counterparts. There are still too few Italian museums capable of acting as a point of reference for the international scene, often due to the absence of a stable multi-year program with definite resources. These, monographic exhibitions, or exhibitions of works by mid-career artists produced by our museums with foreign institutional partners capable of promoting Italian production abroad are still too uncommon. It is easier and less risky to make money by giving preference to well-known artists and mass exhibitions, often already packaged and based on import-export, thus renouncing the basic function of forming the Italian public's taste in contemporary art. In general, there is a lack of an integrated and effective strategy for the institutional promotion of contemporary art abroad and synergy between Italian and foreign institutions. The absence of a valid promotion strategy also applies to the Italian Cultural Institutes, which present a rich promotion activity, but with little organicity and coordination, and to the Italian galleries, which struggle to network with foreign colleagues and take the risk of Italian mid-career artists. Some curators would therefore like to see a concerted overall direction by MiC between all institutions dealing with contemporary art.



According to interviewees, funding for the financing of the production of the works is also insufficient and not constant. Bureaucratic allocation is constantly delayed, in particular in the most important phase: design and creation. Tendering procedures are also often cumbersome, to the detriment of the supplier's quality. This creates a set of circumstances that tends to generate mistrust in institutions and forces artists to seek out spaces and relationships outside our country that can recognize the value of their work. For female artists, there are still further difficulties compared to their male colleagues, tied, for example, to the issue of motherhood. According to the curators, the current training offer of the academies presents significant shortcomings.

Alongside peaks of excellence, professional levels are not always adequate. Not very open to the community and the territory, the academies hardly ever organize end-of-year exhibitions that allow curators and gallery owners to scout. PhDs in contemporary art are still just a wish. There is a lack of tools and places connecting artists with foreign curators and museums, residency programs, and concrete investments in young people. The tendency of the Italian system to act in a hypercritical and self-destructive way completes a bleak picture. If we add to this the lack of attention paid by the generalist Italian press to the dissemination of contemporary art and, on the other hand, the self-referentiality of the specialist press, the image of an overall weak system takes shape, one that alienates the interest of foreign critics and feeds the viral foreignness of Italian collectors.

The school system, on its part, reserves a little place for teaching art, and contemporary art. In particular, it fails in its task of educating an enlightened public. The situation was aggravated by the lack of support for the market and the presence of tax constraints that make Italian galleries heavier than their foreign competitors and do not facilitate collecting. This generates uncertainty in investment and forces galleries in Italy not to take risks, preferring to propose already established and historicized artists, which are very often foreign. Some of the curators interviewed put forward proposals for a solution to this problem. For some of them, there is a need for a reform of the "Italian System" to include and recognize a more multi-faceted reality, capable of considering all the players on the art scene, not only artists, and protecting the different professional competencies; a coordinated system recognizing competencies and roles in which the parties work within a network.

Many virtuous examples were cited by the interviewees: Forum of Contemporary Art, AWI Art Workers Italia, the ITALICS Consortium, and the action of the Quadriennale, valuable steps forward but still not entirely sufficient to promote Italian art in the world.

Moreover, the Italian Council is divided, seen by some as a fundamental instrument for the promotion of Italian contemporary art, in the wake of the British Council and the Mondriaan Fund, while others consider it guilty of having created competition between Italian museums, some of which are penalized in participating in the call for proposals due to a lack of funds precisely because they are unable to sign the bank guarantee required for funding.

Although there are some positive experiences, the major international events, such as the Biennials, present few Italian artists. A possible solution - pointed out by many of the curators interviewed - could be a contemporary art support agency with stable and multi-year funds similar to the OCA (Office of Contemporary Art in Norway), the Mondriaan Fund, or Helvetia in Switzerland, for institutions and museums to help artists from their own country to exhibit abroad, supporting them financially on the one hand, and fostering programs that bring curators, museum directors and critics from all over the world to their respective countries to make the local art scene well known.



Data Analysis

The second part of the report is dedicated to the analysis of data and the mapping of the presence of Italian art abroad. The survey was conducted by analyzing: the permanent collections of 76 international museums; the last 7 editions of the Venice Biennale; the last 8 editions of Documenta; and the last 3 editions of 18 other international Biennials; articles published in 16. 000 online publications in 25 languages thanks to the collaboration with the American research institute *Articker*; the lists of artists represented in 831 international galleries; the Italian Sales of the last 20 years and the auction results from 2000 to the present day thanks to the collaboration of the French art institute *Artprice*; the activities of 25 Italian cultural institutes; and the announcements of the 10 editions of the Italian Council. The study is completed by an in-depth study on taxation in the art sector, on the instruments used to support contemporary art, and analysis by ARTE Generali in collaboration with Wondeur on Italian art centers compared to international ones using artificial intelligence.

The study showed that there are some Italian artists on whom international attention is focused, such as Maurizio Cattelan, Francesco Vezzoli, Monica Bonvicini, Enrico David, Paola Pivi, Tatiana Trouvé, Roberto Cuoghi, Rosa Barba, Vanessa Beecroft and Diego Perrone. Besides the indispensable artistic quality of the work, an element that contributes to the artist's visibility is the study and professional experience abroad, which allows the building of a network with international relationships with curators, galleries, and museums.

1 . Italians present in at least two permanent collections of international contemporary museums

Artist	Permanent collection in the museum	Personal exhibition	Group exhibition
Maurizio Cattelan	13	12	58
Vanessa Beecroft	7	0	28
Rosa Barba	6	8	20
Luisa Lambri	5	0	10
Tatiana Trouvé	5	9	26
Monica Bonvicini	3	3	27
Enrico David	3	7	12
Diego Perrone	2	0	10
Francesco Vezzoli	2	10	16



2 . Contemporary Italians with a personal exhibition abroad in the last five years

Artist	Museum	Year
Rosa Barba	Reina Sofia Museum in Madrid	2017
Yuri Ancarani	Basel Kunsthalle	2018
Enrico David	Museum of Contemporary Art in Chicago	2018
Enrico David	Museum of Contemporary Art in Vienna	2019
Enrico David	Hirshhorn Museum and Sculpture Garden of Washington	2019
Marie Cool e Fabio Balducci	Le capc Musée d'art contemporain in Bordeaux	2019
Formafantasma	Serpentine Gallery in London	2020
Rosa Barba	Neue Nationalgalerie in Berlin	2021
Chiara Camoni	Le capc Musée d'art contemporain in Bordeaux	2021

Italian Art in International Events

From the analysis, it emerged that Italian artists were scarcely present in the 18 international biennials (54 present of which 40 under 1960), absent in the research and Asian ones. They appear more frequently when the curators know the Italian scene or if the artists themselves already reside abroad. Otherwise, the choices fall on Italian names already established at an international level.

On the other hand, even in the country, the presence of Italians in the International Art Exhibition of the last 7 editions of the Biennale from 2007 to 2019 is very rarefied (from 2.6 to 11.9%). Only this year, with the appointment of the curator Cecilia Alemani has the entry of several Italians been favored, representing 12% of the total number of artists.

In the Italian Pavilion, instead, for years the formula of the collective exhibition was favored, which for those who attend the Biennale can have the effect of accumulation. The deepening of artistic work has been possible when a maximum of three or four artists have been invited. This year, for the first time, the artist Gian Maria Tosatti and the curator Eugenio Viola came together to create a solo exhibition. Since 1992 Documenta has assumed a more non-European character to propose itself as an observatory of world art, and the presence of Italian artists has become even more rarefied than at the Venice Biennale: in the previous 7 editions, it oscillated between 2% and 7%. In this year's edition, focused on global art, there are no contemporary Italian artists present.

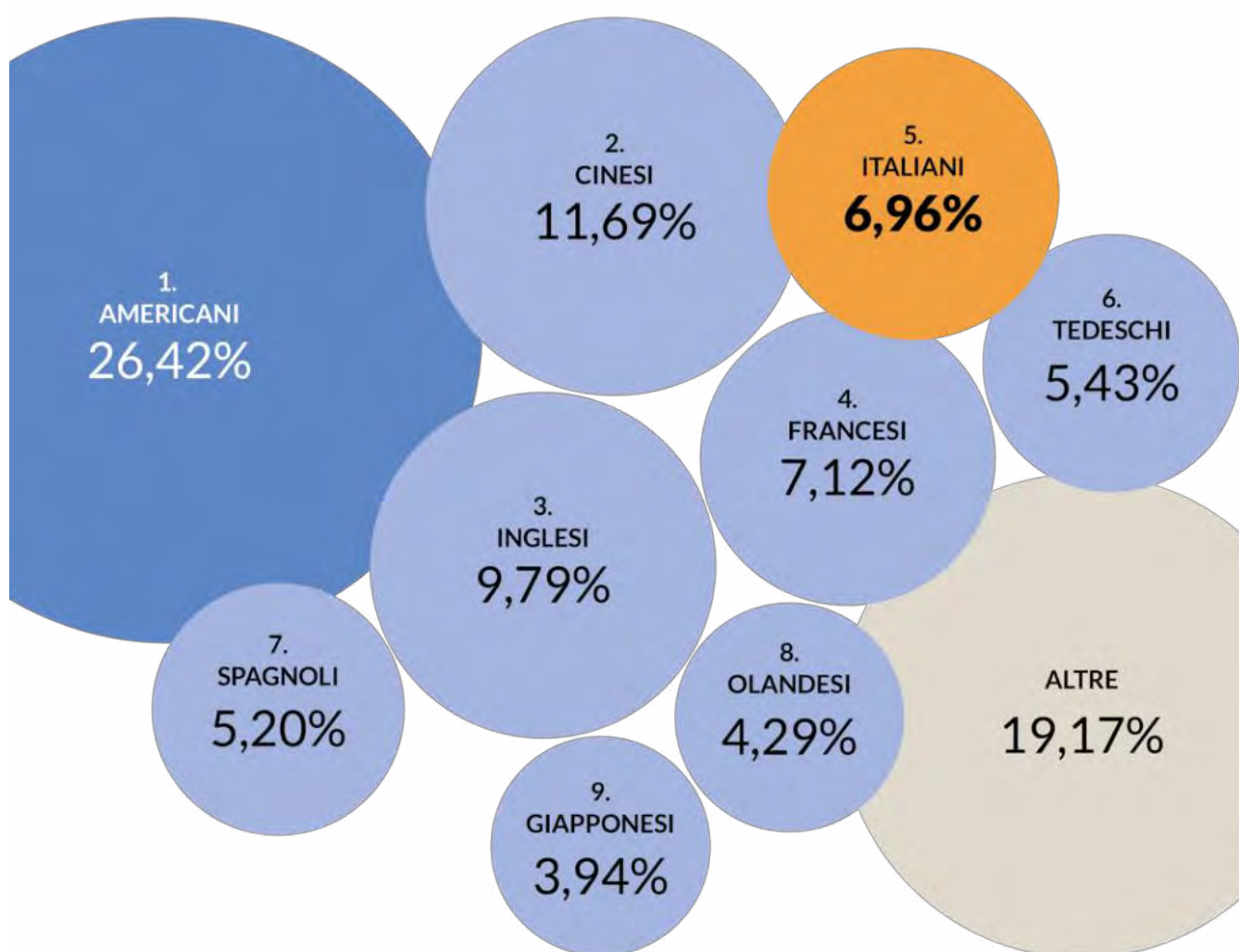


Visibility on media

Articker's analysis for this study of the year 2021 shows that Italian artists currently account for 6.96% of global media coverage of art in each period, ranking fifth worldwide after American, Chinese, British and French artists, but just ahead of German, Spanish, Dutch and Japanese artists.

3. Global media coverage shared by nationality of artists in each period

Quota di copertura mediatica globale per nazionalità degli artisti



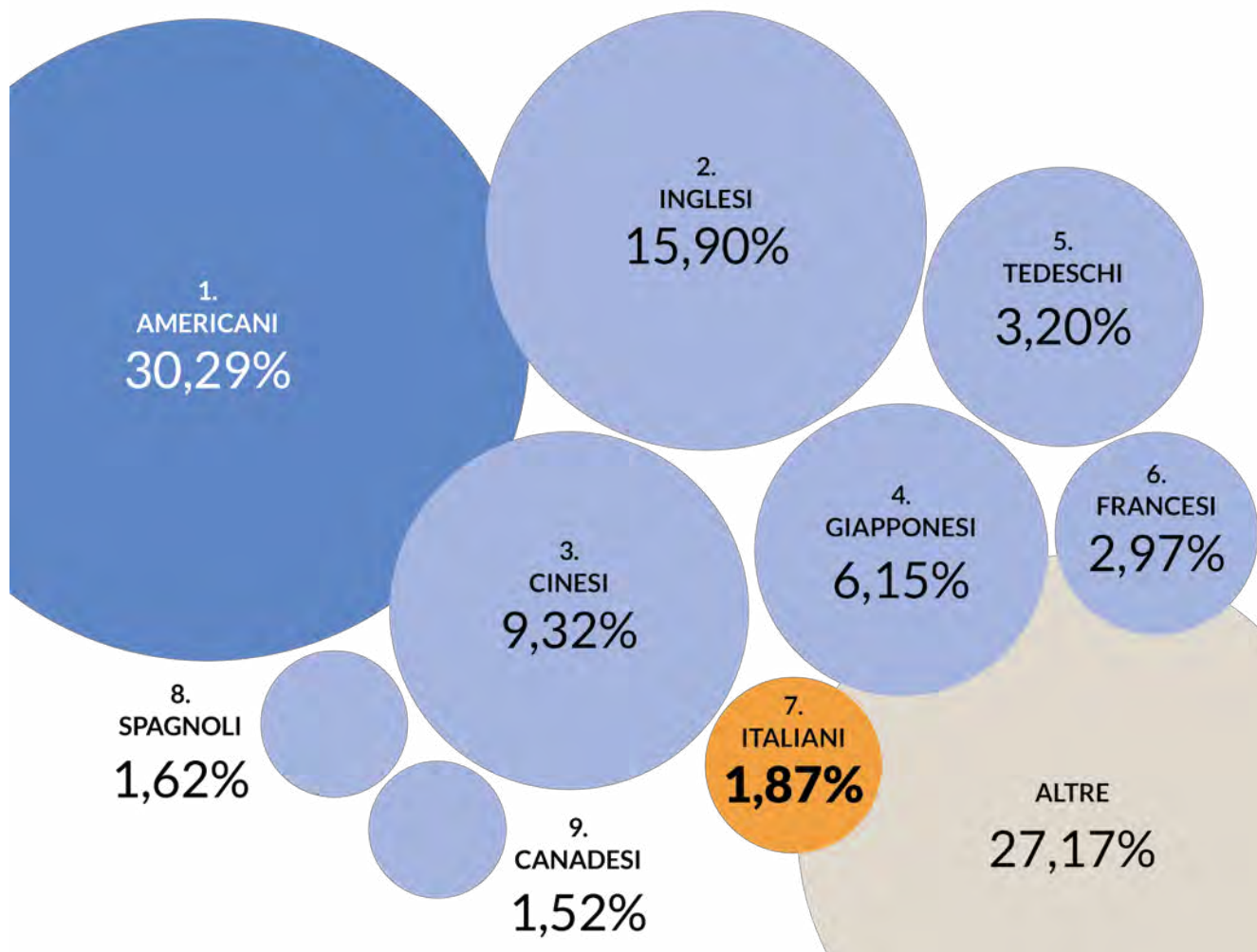
Source: Articker/Phillips, 2021

But visibility drops if we look at artists born after 1960, whose share of media coverage barely reaches 1.87% compared to the strength of the Americans, British, Chinese, Japanese, and Germans.



4 . Global media coverage shared by nationality of artists born after 1960

Quota di copertura mediatica globale per nazionalità degli artisti



Source: Articker/Phillips, 2021



5 . Who stands on the media podium among artists born after

Artist	Year of birth	Media-share % change (VS 2 years ago)	Biggest Driver
Gian Maria Tosatti	1980	40,83%	Gian Maria Tosatti will represent Italy at the Italian Pavilion at the Biennale in 2022
Davide Quayola	1982	38,25%	Quayola at the Modena Visual Arts Foundation
Edoardo Tresoldi	1987	34,24%	Edoardo Tresoldi presents Opera, a permanent installation in Reggio Calabria
Fabio Viale	1975	28,54%	Fabio Viale's monumental tattooed marble sculptures conquer Turin
Marinella Senatore	1977	26,12%	"We Rise by Lifting Others": large light installation by Marinella Senatore at Palazzo Strozzi

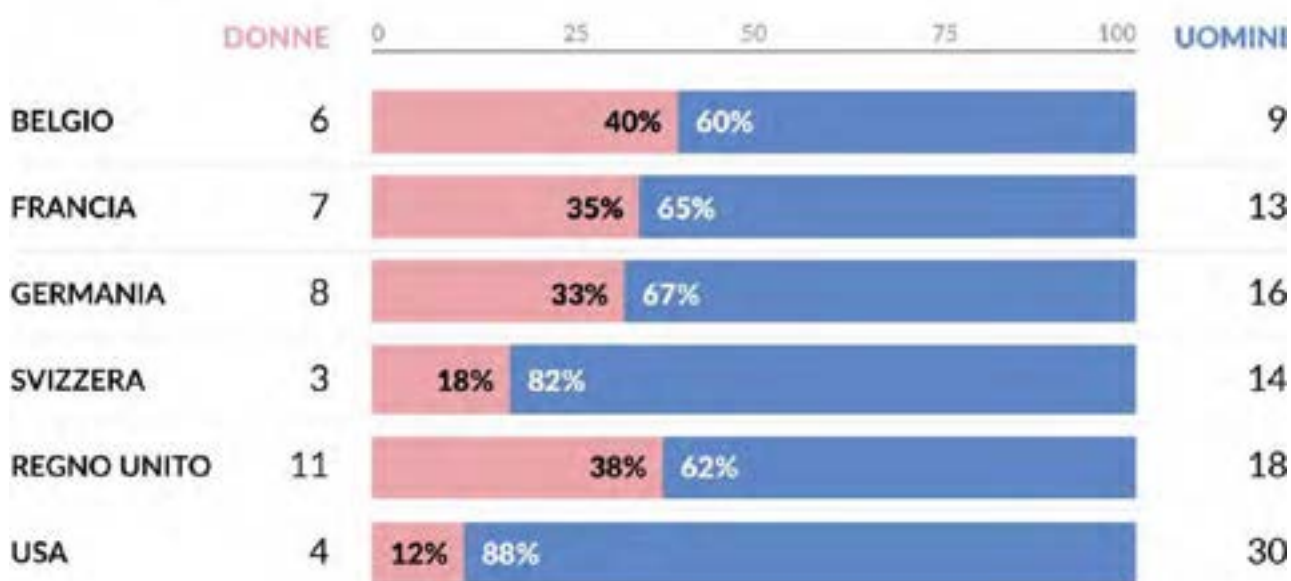


International Galleries

Out of 831 analyzed contemporary art galleries, 16.2% of the total number of galleries represent at least one Italian artist born after 1960. The galleries that invest the most in Italian contemporaries are those opened by Italians abroad or with a strong relationship with Italy and Italian artists. Contemporary artists present in major world galleries can be counted on the tip of one hand (Cattelan, Vezzoli, Trouvé, Golia, Cuoghi).

6 . Just over a third of the artists in international galleries

Il genere degli artisti



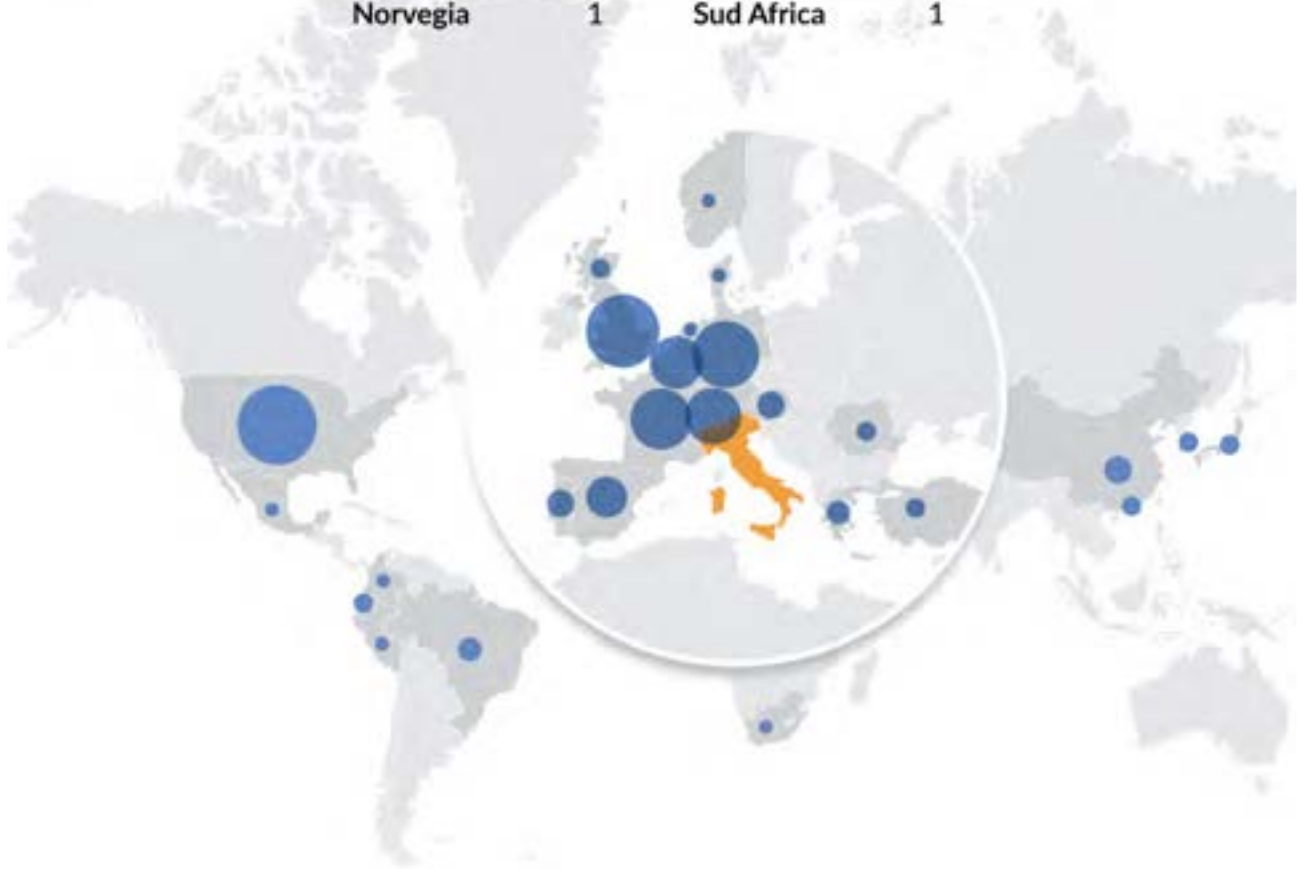
Most of the 135 foreign galleries representing contemporary Italian artists are located in Europe (67%). In the United States, 26 galleries are representing a total of 34 Italian artists. In Asia, only nine operators exhibit ten Italian artists. The map also surveyed the presence of Italian artists represented by Italian galleries based abroad: usually, the strategy of these operators focuses more on historicized artists, already known to the international market and more secure or on talents with an already international following. It is difficult to go beyond the borders for mid-career artists or young emerging artists.



7 . Countries where Italian contemporary artists are most represented

I paesi dove gli artisti contemporanei italiani sono più rappresentati

Brasile	3	Austria	4	Olanda	1	Cina	4
Colombia	1	Belgio	15	Portogallo	4	Corea	2
Ecuador	2	Danimarca	1	Romania	3	Giappone	2
Messico	1	Francia	20	Scozia	2	Hong Kong	2
Perù	1	Germania	24	Spagna	9		
Stati Uniti	34	Gran Bretagna	29	Svizzera	17		
		Grecia	2	Turchia	2		
		Norvegia	1	Sud Africa	1		



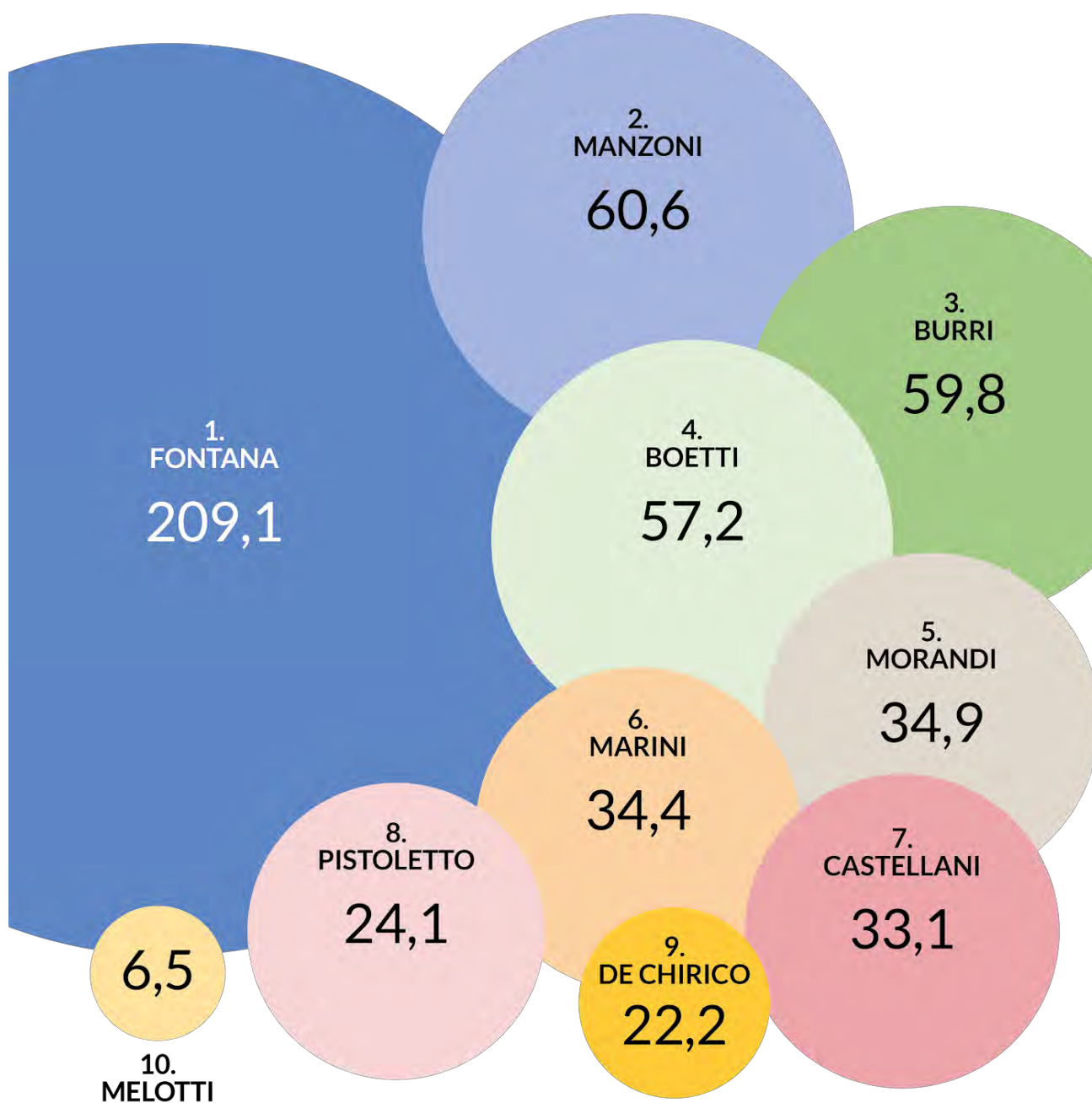
Auctions

The Italian Sales of Christie's and Sotheby's in London over the last 20 years have strengthened the international market for artists from the 50s, 60s, and 70s: from 1999 to 2021, a total of 10 artists born after 1960 were offered: 7 were offered by Christie's with 16 lots and 8 by Sotheby's with 23 lots. The total revenue amounted to £1.7m from Christie's and £1.4m from Sotheby's.



8 . Italian Sales: the top ten Italian artists by total sales from 1999 to 2021
Data in millions of £

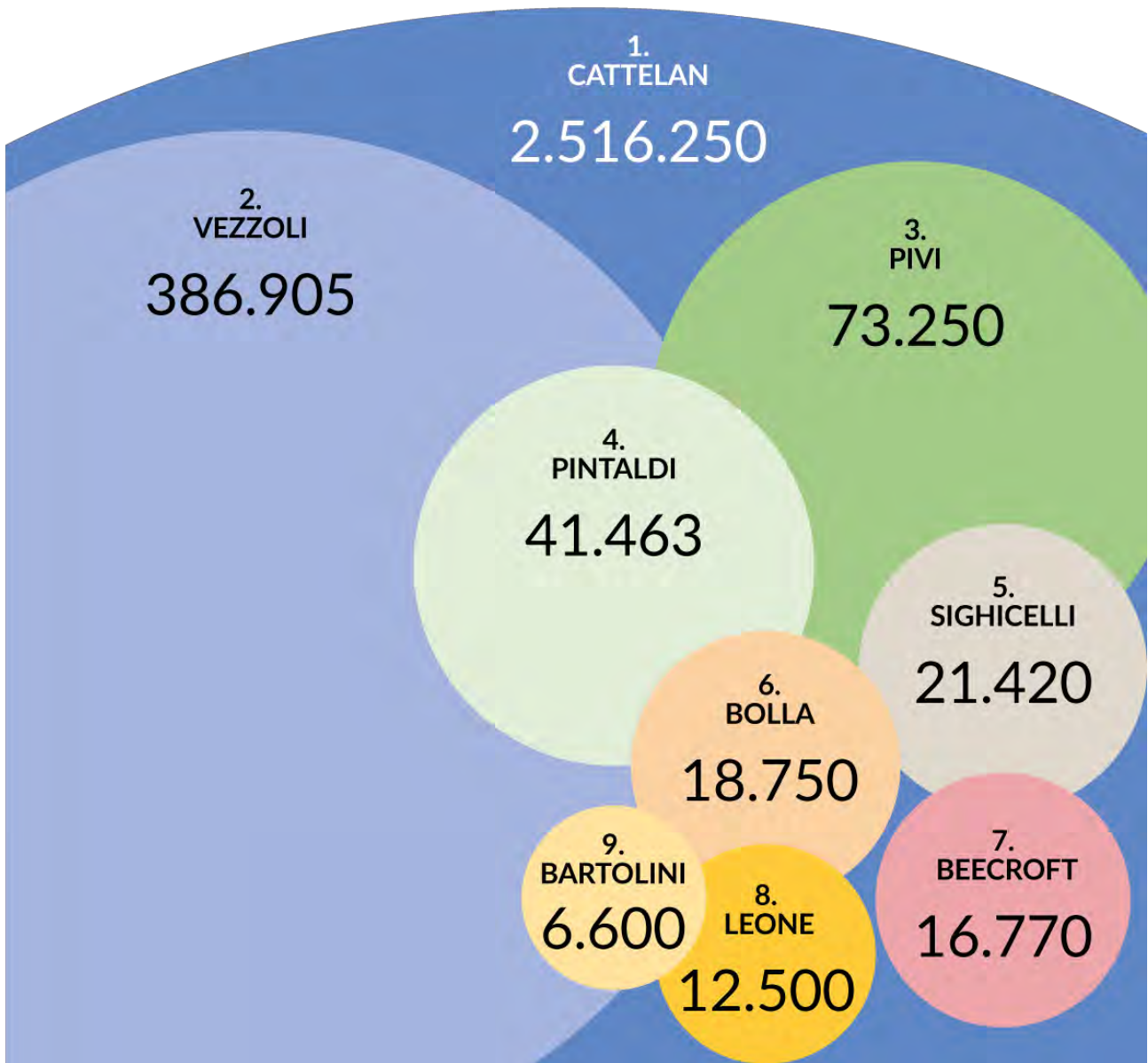
**Artisti italiani top per turnover alle Italian Sales dal 1999 al 2021.
Dati in milioni**



9 . Italian Sales: the only Italians born after 1960 by a turnover present from 1999 to 2021.

Data in £

**Artisti italiani nati dopo il 1960 con i turnover più elevati
alle Italian Sales dal 1999 al 2021 in sterline**



10 . Evolution from 2000 to the present of the auction market for talent born after 1960

Data in \$

The circulation of Italian Contemporary artists on the secondary market is also rarefied in a broader comparison with their French and German colleagues of the same generation: in the years from 2000 to 2021, the auction turnover of Italians grew (+234%) less than their French (+9,214%) and German (+20,597%) colleagues, who achieve higher results in terms of top price, average price, and turnover.

Year	Italian Artists			French Artists			German Artists		
	Nr. artist	Turnover	Prezzo medio	Nr. artist	Turnover	Average price	Nr. artist	Turnover	Average price
2000	17	1.109.964	19.821	56	279.327	2.054	20	107.992	3.272
2001	34	4.327.579	37.307	52	420.784	2.922	33	985.989	12.325
2002	35	1.613.547	17.350	84	415.063	2.731	33	1.140.511	16.064
2003	45	2.036.754	21.440	76	568.422	5.263	28	1.227.956	21.172
2004	35	11.807.342	94.459	86	881.915	5.068	38	3.615.981	27.188
2005	47	6.912.816	40.191	77	808.902	4.676	61	10.506.798	42.538
2006	54	5.506.598	34.633	134	1.223.065	4.189	82	28.978.727	59.505
2007	86	5.651.793	25.574	161	2.356.787	7.274	84	29.421.519	73.006
2008	113	5.280.495	16.298	206	3.344.472	8.001	105	17.014.374	45.861
2009	139	4.910.398	14.274	273	2.928.030	5.976	160	10.453.456	27.365
2010	186	19.586.317	43.817	270	4.957.547	9.181	172	16.593.473	35.007
2011	184	10.589.925	18.353	324	5.120.640	8.723	169	18.307.946	33.778
2012	202	7.395.267	12.305	382	4.067.573	6.229	185	12.566.187	23.228
2013	203	9.173.270	16.709	455	8.156.263	9.484	212	19.634.440	31.617
2014	223	2.641.533	4.470	426	9.273.714	8.355	238	25.965.657	41.479
2015	256	10.842.433	13.553	414	7.535.802	8.439	264	28.796.534	36.871
2016	348	20.422.450	27.524	504	7.709.159	7.406	286	18.758.335	30.402
2017	333	5.729.416	7.327	458	8.079.702	7.008	285	30.745.928	39.117
2018	349	4.105.851	5.184	537	12.801.906	10.537	297	22.278.961	27.676
2019	371	4.066.974	5.680	506	14.191.176	11.509	322	22.230.771	21.774
2020	391	5.605.341	7.327	659	14.875.215	9.825	428	17.192.357	13.225
2021	509	3.705.253	3.754	567	26.017.455	13.153	408	22.351.396	20.619

Compared to the generation under examination, French and German artists climb the ranking for auction turnover, Cattelan, the Italian star artist, is only in the tenth position. The names most present in international museums and exhibitions are absent. Auction dynamics are different from those of institutional valorization.



11 . Ranking by annual turnover of the top 15 artists of Italian (in green), French (in blue), and German (in red) nationality born after 1960

Data in \$

	Artists	Turnover 2021	Sold lots	Record price
1	Claire TABOURET (1981-)	5.800.958	20	870.000
2	INVADER (1969-)	5.749.692	212	555.749
1	Daniel RICHTER (1962-)	3.377.559	23	946.438
2	Neo RAUCH (1960-)	3.175.260	27	1.279.25
3	Julie CURTISS (1982-)	2.597.734	13	466.200
3	Sterling RUBY (1972-)	2.382.412	26	614.853
4	Katharina GROSSE (1961-)	2.208.663	27	565.831
4	Richard ORLINSKI (1966-)	2.187.617	94	681.020
5	Wolfgang TILLMANS (1968-)	1.605.569	66	190.424
1	Maurizio CATTELAN (1960-)	1.223.805	50	867.000
5	MR BRAINWASH (1966-)	1.152.939	270	70.473
2	Matteo PUGLIESE (1969-)	331.016	6	210.923
3	Francesco VEZZOLI (1971-)	179.389	3	81.900
4	VELASCO (1960-)	96.459	15	57.363
5	Marco PETRUS (1960-)	86.389	11	24.538

The cultural power of cities

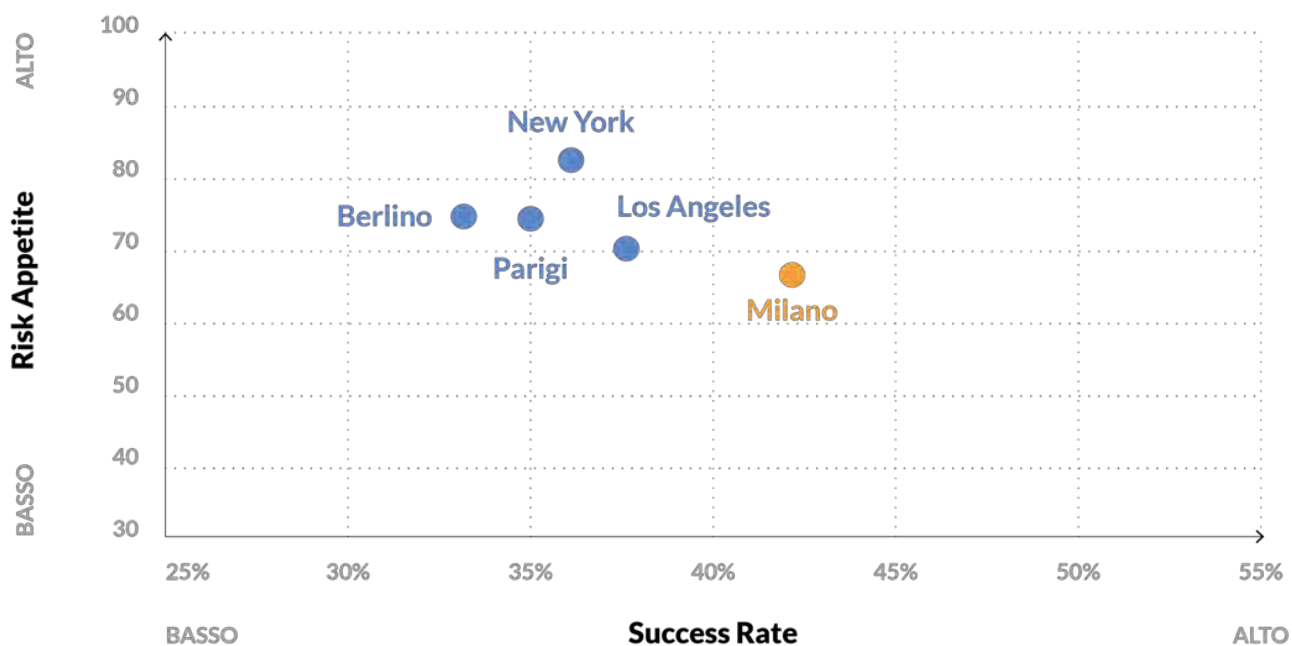
ARTE Generali, through a partnership with the company Wondeur, makes use of an AI system for its underwriting processes that involve the market evaluation of contemporary artists. With the support of this methodology, the "art systems", i.e. the set represented by galleries, museums, and cultural institutes that support the development of contemporary artists, have been compared and the analysis has shown that Milan is one of the most avant-garde cities in the Italian ecosystem, having a success rate significantly higher than Rome and Venice, but even if its risk propensity is comparable to that of the other two cities.

After having outlined the general picture of the Italian artistic ecosystem, a comparison was made with other important world cities and a more in-depth analysis of the careers of Italian artists was carried out. The following factors were considered: artists' solo shows, group shows, museum acquisitions, and the type of institutions that hosted them (galleries, cultural centers, and museums). Milan's galleries have the highest success rate compared to New York, Berlin, Paris, and Los Angeles but a lower risk appetite index, being less inclined to support emerging artists. The situation is reversed if we compare cultural centers and museums: Milan appears distant from other world cities because it is part of a completely fragmented national context.



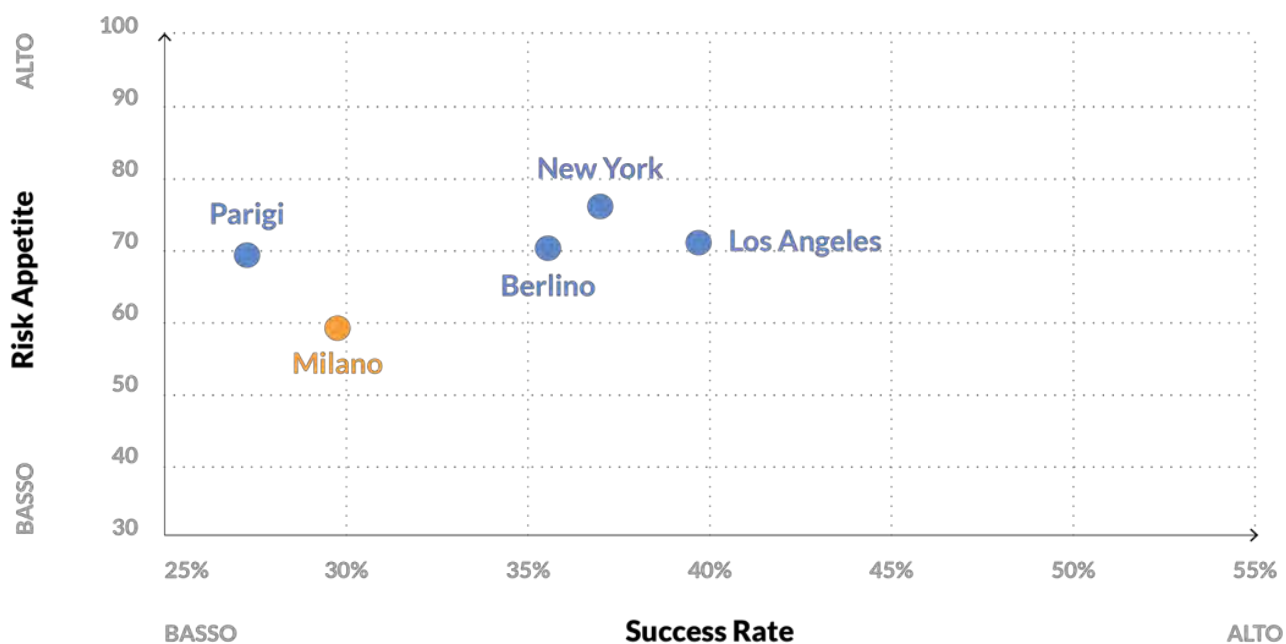
12 . Commercial Galleries - Success Rate vs Risk Appetite

Gallerie commerciali - Success Rate Vs Risk Appetite

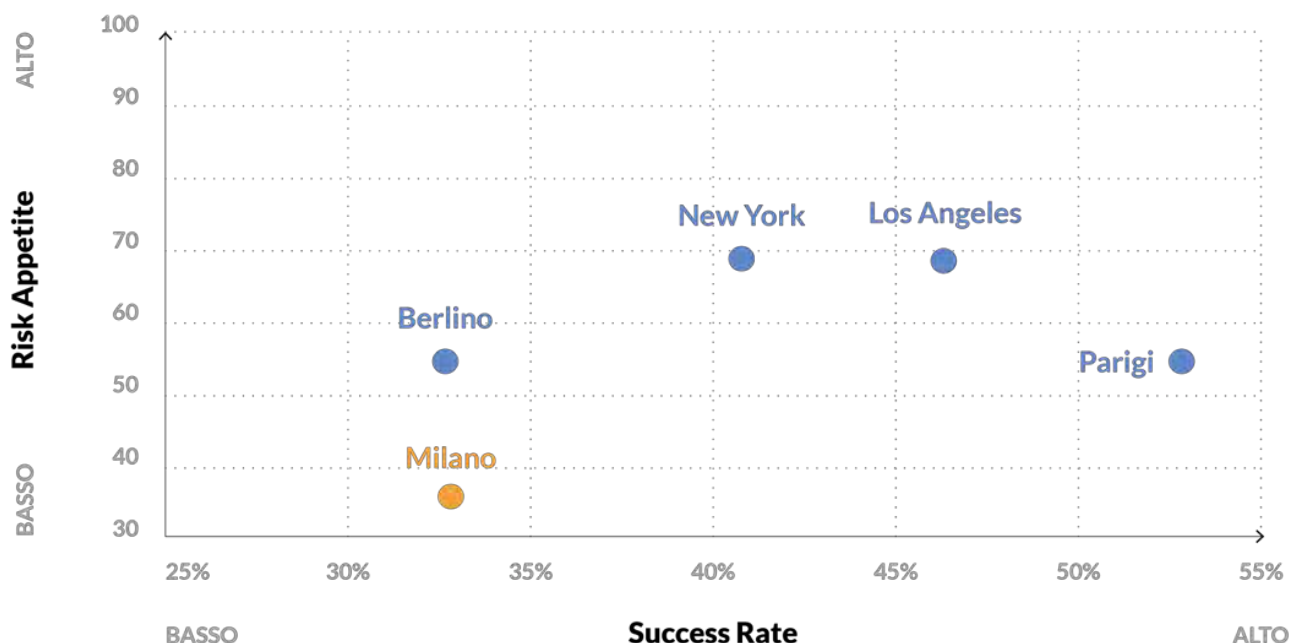


13 . Cultural Centers - Success Rate vs Risk Appetite

Centri culturali - Success Rate Vs Risk Appetite



Musei - Success Rate Vs Risk Appetite



Fiscal Affairs

Economic policies to support the pandemic crisis have failed to give oxygen to contemporary art, lacking legal recognition of the artistic profession and related professions.

Initiatives of a fiscal nature should be undertaken with the aim of endowing the system with greater transparency and, at the same time, making the transfer of works of art more fluid. In particular, among other proposals, we have emphasized the opportunity to make taxable the transfer of works of art between private individuals with a mechanism that distinguishes speculation from collecting, to extend the benefits of the Art Bonus to the purchase of works by living contemporary artists, to suspend from taxation the capital gains deriving from the sale of works in the case of reinvestment or exchange of goods of the same nature, to standardize the VAT rate on imports, which is currently 10%, to that applied in competing countries and to decrease the VAT on purchases and sales made within the main Italian fairs in which foreign galleries also participate.

Alongside purely fiscal issues, the report argues for the need for legal recognition of the artistic profession and related professions: giving identity and favoring accessibility to the profession for art workers, establishing rights and duties including forms of taxation and contributions, giving credibility and support to an economic sector that, if structured, can only grow in both economic and cultural terms.



Public support for contemporary art

Pac 2021, Cantica 21, Q-International

Art Bonus: donations for contemporary art amount to 2,700,367 euros, equal to 0.42% of the total collected.

The Italian Council

From 2017 to 2021, ten editions of the Italian Council call were held and a total of 12,357,805 euros of funding was allocated. There were 642 applications from all over the world. The winning projects were 147. Year after year, funding grew until 2019 (over 4.86 million for the four calls), and then resumed in 2021 with almost 2.5 million allocated. Overall, it has proven to be a valuable tool for the production and exhibition of Italian art abroad, but there is room for improvement at the organizational level.

Italian Cultural Institutes

Map from 2017 to present of the activities carried out by 25 of the 83 Cultural Institutes abroad.



Authors

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Freelance journalist and consultant. Since 2008 she has been covering the art market and collecting for Il Sole 24 Ore and since 2011 she has been teaching the Master in Art and Cultural Heritage Management at the 24 Ore Business School. She is co-founder of Collective, an association of Italian collectors, and the founder of the Contemporary Art Galleries platform. She is co-author of the BMW Art Guide by Independent Collectors. She collaborates with companies on communication projects through art.

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Doctor of accountancy, partner BBS-Lombard, an expert in economics, management, taxation of culture, and fundraising, she carries out consulting and training in these areas. She participates in conferences, talks, and workshops and is the author of publications on cultural management. She holds positions in foundations and organizations and is a member of the working group "Economics and Culture" at the CNDCEC.



In collaboration with

Diletta Magni

Graduated in economics with a specialization in economics and management of art and culture, in 2019-20 she spent a training period in London, during which she worked in contemporary art galleries and participated in industry fairs. In 2020, she began her collaboration with BBS-Lombard, participating in the data research for this report.

Beatrice Masini

After some experiences as an assistant in commercial galleries of contemporary art, in 2020 she enrolled and covered the role of the tutor in the master of Economics and Management of Art and Cultural Heritage at the 24ORE Business School in Milan. Following the master she collaborates with the firm of associated accountants BBS-Lombard in Milan, focusing her work on research related to this report.

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How Italian contemporary art is (re)known abroad





**Valore
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How Italian contemporary art is (re)known abroad





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Grazie agli **strumenti di supporto decisionale di Artprice** (cifre chiave e tendenze del mercato degli artisti, statistiche e grafici), posso comprendere il mercato e analizzare le performance degli artisti, conoscere l'indice dei prezzi, il fatturato, la distribuzione geografica, le classifiche e il tasso di invenduti. Ho tutte le carte in mano per prendere una decisione di acquisto obbiettiva.

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Magnifico Oltorio, 'Vestibolo', 1987
Vaso in bronzo e ceramica.

PHILLIPS

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