

# National Contemporary Art Gallery Wales

Preliminary Feasibility Study & Options Appraisal

July 2018



(jk), Stewart Lee & Andy Fung  
Studio & Lost Heritage

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Client: Museums, Archives and Libraries Division (MALD),  
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Event Authors: Lucie Branczik and Becky Schutt  
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Event Communications Ltd  
India House  
45 Curlew Street  
London SE1 2ND

+44 (0) 20 7378 9900  
info@eventcomm.com  
www.eventcomm.com

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**“In Britain, whenever people come across something new and exciting, but challenging, there is a tendency for them to run for cover, to want what they know and are comfortable with. To design a great new building takes courage on everyone’s part. I think we have a lot more explaining to do.”**

**Zaha Hadid, 1995**

Jonathan Glancey, “A monumental spot of local trouble” (The Independent, Jan 1995)



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# Foreward

“Wales is fortunate in possessing a healthy and vibrant contemporary arts landscape. Artes Mundi and the Venice Biennale demonstrate our international reach; the developments at Amgueddfa Cymru and the Glynn Vivian in recent years demonstrate growth; the spread of excellent galleries across Wales demonstrate strength; and the number of artists working here demonstrates a wealth of creativity and passion.

This report, therefore, is well-timed in its task to explore and examine the existing landscape. The consultants were asked to consider the need for a National Contemporary Art Gallery, to identify what the scope of such an organisation might be, the resources required, and to offer a model for our consideration.

It is a well-researched and thorough study. It identifies the issues, and sets out a possible solution. However, there must be further discussion and we need to pose and answer fundamental questions before we get to the detail. Is this what we want for Wales? How do we work together to achieve joint goals? How do we use the results of this study to make contemporary art accessible to everyone across Wales? How do we support and encourage our artists?

The Contemporary Arts world in Wales and beyond has been generous in its thoughtful support of this work and I look forward to continuing debate and discussion.”

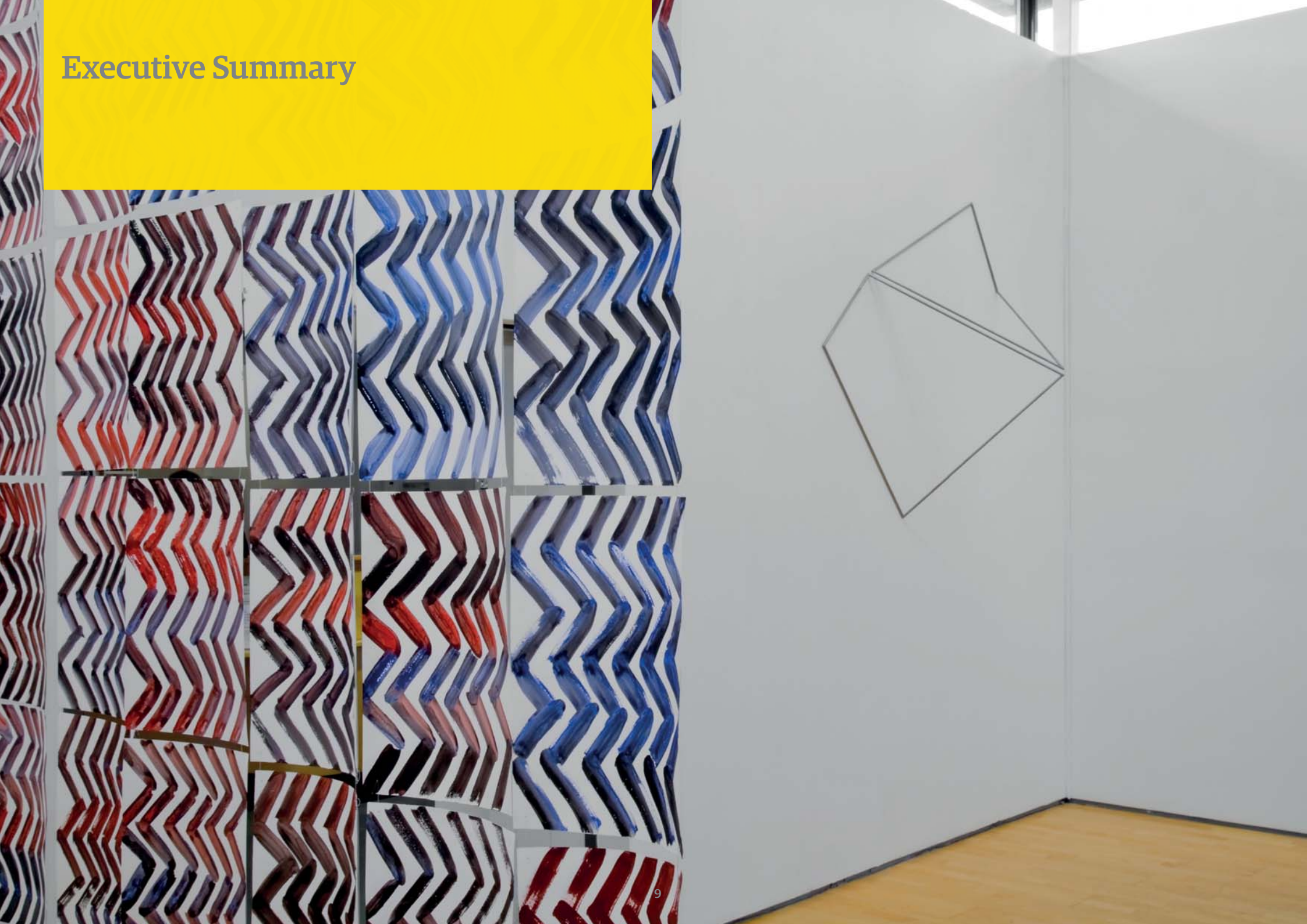
Dafydd Elis-Thomas AM

Minister for Culture, Tourism and Sport

Opposite:  
Kelly Best, Installation View.  
Frame (watercolour on paper) and Apex #1  
(mild steel)  
Source: Kelly Best



# Executive Summary



# Executive Summary

**“The challenge to Welsh institutions and leaders, those with resources and influence, is to pool resources and to change what they do in order to facilitate and support action at the local level. We understand the level of challenge this presents to current ways of thinking. However we also think it is an opportunity which cannot be missed if we want more equal, vibrant and healthy communities.”**

**Baroness Glenys Thornton, Chief Executive, The Young Foundation, 2016**

In 1969 the Welsh Arts Council (WAC) launched Art and Society, a thematic programme of exhibitions that explored contemporary topics – War (1969), Work (1970), Worship (1971) and Sex (1973) – through interdisciplinary art exhibitions. Seven years in duration, the programme blurred and widened artistic and social boundaries, embedded culture in public discourse, challenged the status quo about how and where art should be created and experienced, and willingly accepted the risk of controversy, critique and even failure as an element of ambition. Above all, the scope of the programme was driven by the belief that Wales could become a true, vital and relevant home of contemporary art, one that replaced the increasingly obsolete, aristocratic, elitist model of culture with one defined by inclusivity.<sup>1</sup>

Almost fifty years later, Wales today has an active network of visual arts institutions, galleries and multi-purpose venues and a thriving contemporary art practice bolstered by its representation at Cymru yn Fenis Wales in Venice. The success of the Artes Mundi Prize, a biennale international exhibition in Cardiff founded in 2002 by Welsh artist William Wilkins with support from Arts Council of Wales, is demonstrated by the over 800 entries it attracted in 2016 from critically acclaimed artists across 90 countries. There are ever-growing collections of modern and contemporary art – comprising paintings, drawings, sculpture, photography, crafts, installations and mixed-media works – held within the Amgueddfa Cymru – National Museum Wales (Amgueddfa Cymru) and National Library of Wales, among other organisations.

Yet if much of the spirit of the WAC's 1969 programme has been realised, there is one notable absence. Almost fifty years after that groundbreaking programme there is

still no dedicated, populist, national platform for modern and contemporary art in Wales.

This report has been commissioned by the Welsh Government in partnership with Arts Council of Wales and Amgueddfa Cymru to ascertain the potential for a National Gallery of Contemporary Art Wales. The study is based on extensive consultation, and following an options analysis, makes ambitious recommendations for developing contemporary art in Wales with a national institution sitting at its core.

Underlying the recurrent desire for a National Gallery of Contemporary Art Wales is a sense that, while there are pockets of excellence, Wales lacks a focal point for contemporary visual artists and Welsh and international audiences. Many feel that a new institution could represent the country on the global stage. However, there is a sense that the standard 'iconic' building often parachuted into a city is not the only, or indeed the best, answer for

Wales. This report identifies the challenges of creating such an institution: the nation's geography and the distribution of its population (north and south, urban and rural), language and cultural diversity, as well as the requirement not to drain capital and revenue investment from existing, and successful, cultural institutions and programmes. The report argues that these challenges can be viewed as assets that can be built on as the model for a new national gallery is explored.

If this is accompanied by a vision that rises above discussions about the intrinsic and instrumental value of the arts, the result could be a National Gallery of Contemporary Art which is genuinely of and for Wales. Its principles would involve creating sustainable and resilient networks at all levels of the arts ecology. It would aim to make Welsh contemporary art iconic, along with the landscapes, people and culture that inspire it. It requires public sector priming investment, but has the potential to generate new business models

1 Ken Baynes, The Art and Society Project of the Welsh Arts Council, Leonardo, Vol. 6, (Pergamon Press, 1973) 97-102; Huw David Jones, Redefining Art and Culture: The Welsh Arts Council's 'Art and Society' Exhibition Series 1969-76, Visual Culture in Britain, Volume 15, 2014, Issue 1, 28-49

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which will help increase the total resources available.

Additionally, a new gallery would nurture artists throughout their career spans and participants and audiences throughout their lives. The aim would be to embed the arts in education, health, the creative industries and the tourist economy, ensuring it plays an inspirational role at every stage of people's lives. By building on existing assets, and leapfrogging current paradigms about gallery building, Wales could become a world leader in creative citizenship, addressing both its highest cultural ambitions and its commitment to a more sustainable, just and inclusive society.

## Background

In 2008 a feasibility study for a National Gallery of Art for Wales and an options study for a National Centre for Contemporary Art were undertaken, yet neither of the Studies' recommendations – to house the National Gallery of Art in a reconfigured Cathay's Park site; and to

house a National Centre for Contemporary Art in a 'white box' space in Newport Riverside or Swansea - was taken forward.<sup>2</sup>

It is within this context, that the commitment to a Feasibility Study has been made by the Welsh Government via a 2017-18 budget allocation. This sends an important signal that the idea of a new National Contemporary Art Gallery Wales should be constructively developed and vetted, and could be well positioned to play a role in helping to create 'The Wales We Want' (Wales 2050 Future).

This Preliminary Feasibility Study and Options Appraisal is thus designed to explore bold questions about the nature, needs and opportunities presented by contemporary visual and applied arts, while rooting any answers in the reality of the lives of the public, the artists, and Wales' cultural organisations. *What does the nation need from contemporary arts and artists?*

<sup>2</sup> ABL Consulting, The Future Display of Visual Art in Wales (2008)

*What change do we want and need for Wales? What will make a difference to communities, to artists and to the existing visual arts infrastructure? What is the new, bespoke or ideal model for Wales? How will it bolster or catalyse what we have? And can we achieve that through a national contemporary arts entity?*

## Findings

Event's sector-wide consultations, site visits, research, and visioning and options workshops, highlighted that:

Contemporary art in Wales is noted for its focus on Welsh landscape and language, and while contemporary visual arts practice in Wales is diverse, many artists across many media remain deeply inspired by and connected to their physical environment. Forward-thinking practices in collaboration and audience engagement, including a re-thinking of curatorial authority and co-creative programming, are being trail-blazed by artists and curators at Wales' national, regional and hyper-local

visual arts organisations.

While this Study's focus is on visual and applied arts, the National Theatre Wales' pioneering approach to embedding and co-creating theatre with communities is a world-class benchmark located at home. Celebrating its tenth anniversary next year, the National Theatre Wales' model, learning, values and successes are key to unlocking a new way forward for visual art in Wales. Crucially the organisation embraces multiple artistic mediums under the category of theatre; treats the nation as its stage; and is actively committed to decentralised ownership of the national entity.

The Welsh visual and applied arts ecology is diverse and evolving, and comprises publicly-funded, commercial and grass roots art organisations. The sector in Wales is tightly-knit and historically bound by the geography of the country, with two-thirds of the population based in South Wales.



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The sector is in part characterized by a small pool of passionate, professional curatorial staff, but also by limited funding opportunities. Visual arts partnerships in Wales take the form of skills and knowledge exchange, collections sharing and some co-curation. Yet there is wide recognition from the sector that these partnerships could be more strategic, more proactive, and potentially scaled and leveraged. They could include joint-research, advocacy, joint-funding bids and exhibition exchange. While there is no dedicated national contemporary art gallery in Wales, it is imperative that any new entity complements and builds on Wales' existing assets and resource rather than destabilising or disregarding what exists.

The visual arts sector has an ambition to build its national and international profile, and to ensure there is healthy and ongoing dialogue across the nation's borders. Such well-regarded platforms as Cymru yn Fenis Wales in Venice, Artes Mundi and organisations including the British Council actively seek to broker international dialogue and partnerships. Yet this ambition is tempered by limitations, including a lack of staff capacity and resource; insufficient exhibition space precluding organisations from being active participants on the international touring circuit, both importing and exporting

contemporary exhibitions; a lack of sector-wide advocacy or strategic relationships with the national press; and tourism material that does not overtly position the arts as a key driver to Wales.

With pioneering creative education programmes being rolled out nationwide in Welsh schools and galleries, the 'top-down' commitment to the STEAM subjects coupled with 'ground-up' local expertise positions Wales at the forefront of an holistic education offer for children and young people. By igniting and fostering creativity in this generation now, Wales is paving the way for innovative, expressive, resilient citizens who are vital to the vibrant health of communities and an inclusive and creative economy.<sup>3</sup>

Welsh art schools and universities are the next obvious port of call for nurturing the creative talent pipeline. Yet while they demonstrate pockets of excellence, they do not currently rank in the top 50 art schools globally, or in the top ten in the UK. Artists graduating into the art scene are well supported by the existing visual arts infrastructure, but many emerging artists

<sup>3</sup> Inclusive growth means economic growth which enables as many people as possible to contribute and benefit from growth. These benefits are both social (benefitting people across the labour market spectrum, including groups that face particularly high barriers to high-quality employment) and place-based (addressing inequalities in opportunities between different parts of the country and within economic geographies). Royal Society for the Encouragement of Arts, Manufactures and Commerce. <https://www.thersa.org/>

then leave Wales by mid-career and few established artists return. The health of the overall visual arts ecosystem is interlinked with attracting commercial galleries and emerging talent from outside of Wales. This should go in tandem with supporting an enabling environment to retain mid-career and established artists.

Research undertaken by the Arts Council of Wales shows that there was high attendance (1,103,436) at participatory arts sessions over 2015-16 compared with the other art forms and that young people (aged 16-34) are the most likely to visit an art gallery. However there are potential, untapped audiences for the visual arts, only 18% of the population having visited an art gallery in the most recent analysis of post-code data.<sup>4</sup> There is a lack of analysis about cross-venue patterns in current audience behaviour, the profile of untapped audiences, and the motivations, behaviours and barriers in and to experiencing contemporary art. Significantly, cultural tourists are not currently targeted in Wales' tourist positioning, with Wales' existing cultural assets being notably absent from the The Wales Way, VisitWales' newly launched tourism campaign.

<sup>4</sup> Audience Agency

## Key Contexts

The economic case for investment in culture and creativity is powerful and globally recognised. The visual arts sector is embedded within the wider creative industries, which generate £8.254m in Wales per annum<sup>5</sup> (as a measure of the value of goods and services produced) and are growing at a rate of 11%, twice as fast as other industry sectors in the UK. The UK creative industries exported £14.7bn worth of goods in 2015, and their highest export sub-sector included the visual arts.<sup>6</sup> The sector's jobs are outperforming employment growth in other sectors, and creative jobs are highly skilled and highly resistant to automation.<sup>7</sup> As Peter Bazalgette's Independent Review of the Creative Industries emphasized in 2017, *"The skills...of this sector...are those which many experts judge to be of increasing importance: blended technical and creative skills; collaborative interdisciplinary working; entrepreneurialism; and enterprise."*<sup>8</sup>

<sup>5</sup> Constrained regional gross value added (GVA) estimates (Office of National Statistics, 22 March 2017). The GVA of Creative Industries in England was £82,158m, in Wales was £825m, in Scotland was £3,397m and in Northern Ireland was £970m

<sup>6</sup> In addition to Music, and performing arts, Crafts; and, Publishing, DCMS Statistics Focus on Creative Industries 2016, Table 2 (Department for Digital, Culture, Media and Sport, 2016)

<sup>7</sup> Hasan Bakhshi, Carl Benedikt Frey, Michael Osborne, Creativity vs. Robots: The Creative Economy and the Future of Employment (Nesta, October 2015)

<sup>8</sup> Sir Peter Bazalgette, Independent Review of the Creative Industries (September 2017)

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Creative industry clusters are being developed as a sound strategy for bolstering the sector and encouraging growth outside of London. The Creative Industries Cluster Programme is investing £80m in eight creative research and development partnerships across Britain and for which Clwstwr Creadigol / Cardiff University is one of 22 shortlisted entries as of February 2018.

Welsh leaders and current government policies recognise this economic contribution, and the benefits of nurturing and retaining a creative workforce from an economic, social, and reputational perspective. However, political recognition of the power of the arts and creative industries is not resulting in comparably scaled public investment in Wales' visual arts sector. An acknowledged lack of coordinated advocacy from visual arts leaders and artists does not help the case for support.

Wales' capital investment in the visual arts over the last 10 years was £25m. Arts Council of Wales has distributed £19.88m in Lottery Funded capital grants since 2008; 9% has been for visual arts projects. While these figures are notable given the 3.1m population of Wales, they fall short when compared to other nations. In April 2018, for example, Ireland publicly committed to investing €1.2bn in culture,

heritage and language over the next ten years, with €725m dedicated to cultural institutions, ensuring a regional balance, digitisation of the national collections, media production and Galway European City of Culture. Standalone arts facilities announced or near completion include V&A Dundee (£80m project designed by Kengo Kuma<sup>9</sup>), Courtauld Institute (£50m project designed by Witherford Watson Mann) and Factory in Manchester (£110m designed by OMA/Rem Koolhaas).<sup>10</sup>

Austerity and more recently the vote to leave the EU have exacerbated financial challenges for the public sector<sup>11</sup> and the business model behind the visual arts ecosystem in Wales has vulnerabilities, not least a failure and/or an inability to diversify. Consultations revealed a sector-wide concern that any new national entrant, requiring both major capital and ongoing revenue support, might at best destabilize and at worst destroy the existing publicly funded ecology. The currently unstable 'tripod economy' (comprising contributed, earned and public income sources), with

<sup>9</sup> ££63.8m of funding from Scottish government including £22m from Growth Accelerator Model Fund for the wider £1bn waterfront regeneration project; £13.9m from the Heritage Lottery Fund; £6.6m from private fundraising; £6.5m Council capital budget allocation. V&A at Dundee price tag almost doubles to £80m (BBC News, 16 January 2018)

<sup>10</sup> UK government committed £78m in 2014; Manchester City Council contributing the remaining funds. The project is also set to benefit from government funding of £9m a year from 2018/19

<sup>11</sup> Dr Simon Thurley CBE, Review of Amgueddfa Cymru - National Museum Wales, Executive Summary, (Welsh Government, June 2017)

'co-opetition' [i.e. collaborators who must sometimes compete, and vice versa] between Welsh arts organisations and unaligned planning and funding cycles, means that there is a necessity to explore other sources of income beyond the traditional categories. These could include building an endowment, initiating crowd-funding, venture philanthropy, patient capital, loan agreements, R&D, and/or bespoke, integrated corporate sponsorship packages. Indeed, there is an opportunity for any national entity of contemporary art to serve as a leader in helping the sector reconfigure its business model, including, for example, the provision of direct access to expert staff working at national level.

Moreover the growth of 'Impact Investment', which allies financial return with the intention to generate positive social or environmental change, currently accounts for at least £150bn of committed capital in impact investments in the UK alone.<sup>12</sup> This is underscored by the existence of a diverse ecosystem of specialist intermediaries in impact investment and the establishment of GSG in 2015 as the successor to the Social Impact Investment Taskforce, established by G8 two years prior.<sup>13</sup> The UK

<sup>12</sup> Growing a Culture of Social Impact Investing in the UK, Government Department of Culture, Media and Sport, November 2017, HM Treasury, Tracey Crouch MP, and Stephen Barclay MP

<sup>13</sup> Ibid

Department of Culture, Media and Sport has identified significant latent capital from both retail and institutional investors currently readily available to support future growth and the UK National Advisory Board has quantified this, suggesting that over the next decade in the region of £300bn could be channelled into Impact Investments that are helping to directly address critical social and environmental challenges.<sup>14</sup> The visual arts sector in Wales has not to date strategically positioned itself within the Impact Investment space explicitly, despite carrying out socially valuable activities.

Finally, reverberations from decades-old attempts to build a visual arts national gallery remain in the discourse. Many recognise any new national gallery as 'high risk' and most had questions about who the ultimate decision maker would be for determining if and how recommendations herewith are pursued. Despite the reservations, however, there emerged a powerful and widely-felt ambition and enthusiasm for a new model for the display of contemporary art in Wales.

<sup>14</sup> UK NAB, The Rise of Impact: Five steps towards an inclusive and sustainable economy, UK National Advisory Board on Impact Investing (Oct 2017)

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As one professor commented,

*"I have to say – the conversation goes round in circles. This notion of a distributed gallery or a beautifully constructed arc in one of the major cities. Can we finally make a decision?"*

## Options

21st-century public art galleries have embraced a considerable range of new physical and strategic models in order to realise their programmatic, curatorial, social ambitions and, more sobering, a balanced spreadsheet. Perhaps the most high-profile approach was pioneered by the Guggenheim in the Basque region in the early 1990s, and announced in 2008 and in development today is Guggenheim Abu Dhabi on Saadiyat Island in the United Arab Emirates. There were notable attempts (but not always successes) to replicate this plan around the world (São Paulo, Vilnius, Tokyo, Hong Kong, Soho (1992-2001), Berlin (1997-2012), Las Vegas (2001- 2008), Salzburg (Austria), Guadalajara (Mexico), and Helsinki (2012; 2016). Wales entered into very early conversations with the Guggenheim Foundation at the time of Helsinki's international architectural competition.<sup>15</sup>

This franchise model has continued to be pursued alongside the Overseas Partnership Model (for example, the British Museum providing strategic and programmatic support to Sheikh Zayed National Museum in Abu Dhabi) and is counterbalanced by more subdued, but equally strategic distributed approaches to sharing and exhibiting national collections of modern and contemporary art (for example, The Plus Tate network of 35 UK visual arts organisations, and separately Tate's visual arts family of four - Tate Britain, Tate Modern, Tate Liverpool and Tate St. Ives). Elsewhere, physical footprints have been extended to meet the evolving needs of artists, curators and the public, with extensions and outposts both within and outside the home town opening their majestic doors (V&A East and V&A Dundee; The National Gallery of Ireland, IMMA Dublin; Louvre Lens). Co-located models, with established visual arts entities embracing an intermediary and incubator status for the creative sector, have also been making their mark (and strengthening their networks) outside of national institutions in Strelka (Moscow), Somerset House and Snape Maltings, to name but a few.

For the purposes of this study, and in the context of the opportunities particular to Wales, twelve options for a new National Gallery of Contemporary Art Wales were developed, explored and designed iteratively with the Steering Committee and

working groups. These were vetted according to detailed criteria and weighting, with the seven broad categories being:

1. Assessing the option's fit with the vision and values of key stakeholders;
2. Audience access, particularly for underrepresented communities;
3. Financial viability;
4. Market viability;
5. Timeframe;
6. Environmental sustainability and;
7. Residual risk after mitigation.

A locations analysis was agreed to be preemptive, with the need to ensure the concept and model development stage was robust. As one artist stated,

*"I don't mind where it is so long as it is."*

The twelve options are building-based and building-less options, single and multiple sites, existing and new, and/or a service or partnership agreement. They are a Sharing Contemporary Arts Partnership; A Charm Bracelet; A Visual Arts Family; the Network Members Club; The National Canvas; The Circus; The Extension; The Outpost in the Capital; The Outpost Outside the Capital; Hive/Co-Location; Merger; and Do Nothing – with an emphasis on understanding what the positive and negative reverberations of

abandoning the idea now might be.

While the long-list of twelve options was thorough, it notably and with ample consideration, did not, in the end, include the Franchise Model, the Overseas Partnership Model or a Standalone Model (i.e. an independent institution from Amgueddfa Cymru). For the first two models, we returned to the ambition - a national contemporary art gallery that is authentically of and for the people of Wales - with the recognition that Wales today has the assets and approach to establish its own, if it so chooses. The Standalone Model was discounted as our view, shared with the Steering Committee, was informed by the linkage in governance to Amgueddfa Cymru and the consideration that a new national standalone site would compete with the Amgueddfa Cymru Family, rather than have opportunity to leverage the Amgueddfa Cymru's extensive collections, expertise, resources and network. This is not to say that the new entity could not have a refreshing and powerful identity of its own; this remains a core ambition.

Event undertook an independent review of the options, and based on this options appraisal, puts forward its recommendations.

<sup>15</sup> The Guggenheim Foundation was quick to quash speculation that a Welsh Guggenheim had any traction. Adam Price, Why a Welsh Guggenheim makes sense (The Guardian, 10 Jun 2013)

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## Recommendations

*“Wales can and should put itself on the map! It can start from scratch in 21st century and be really, really fresh.”* Museum Director

The proposed National Contemporary Art Gallery Wales is a world-first. It showcases Wales' stunning environment, wraps rural and urban communities into a conversation through art, and demonstrates a bold, lasting and internationally eye-catching commitment to nurturing and showcasing human creativity.

Rather than endorsing a single new building to house and display contemporary art, we recommend a dynamic, distributed national model that builds on 6-8 existing and developing arts locations across Wales, along with a permanent central hub. This distributed model is heralded by a series of newly commissioned contemporary 'living artworks' set in the landscape and amongst communities and are developed with creative producers, artists and communities across the nation.

The recommendations approach the idea of a 'national' gallery in an innovative way: by devolving funding the Gallery aims to share the nation's art with the people of Wales, bolster and connect existing visual arts assets and resources, and further cultivate creative clusters. The Gallery will encourage artists to create within non-

traditional and traditional spaces, and deploy the landscape itself as the medium, the canvas and a gallery.

**Recommendation one:** We recommend a progressive, evolving and scalable strategy that collectively is the National Contemporary Art Gallery Wales. This should be accompanied by the immediate roll-out of a set of pilot projects to be delivered in parallel. These will be designed to test and refine the concept and to spark interest and build momentum around the development of a National Contemporary Art Gallery for Wales.

The 'Gallery' comprises three interlinked phases:

### Phase one: The National Canvas

The Gallery will commission 50 new works installed across the five regions of Wales, co-developed by audiences, existing visual arts organisations, community organisations, curators and artists, and defined by 6-8 geographical clusters. Emerging, mid-career, and established Welsh and international artists, in partnership with communities and curators and producers will be the core creative engine charged with considering how best to integrate landscape (rural and urban), art and ideas. The co-creation approach builds upon the existing work of cultural

organisations, including that of Amgueddfa Cymru and National Theatre Wales, who have actively cultivated a network of 'ambassadors' across the nation.

Rather than 'parachuting in' large-scale, permanent sculpture, the Gallery will embolden artists and communities to co-create high-quality works of art. Creative producers, artists and curators, working in tandem with communities, will be commissioned to create new artworks by exploring how creativity, landscape and public spaces can intersect. Ultimately Wales continues to set its own high-standard, and possibly a new standard, for contemporary art, and challenge how we see, work, communicate, play in and experience our surroundings. Two successful examples are Nils Norman's sensory playground, *Yr Lard*, St Fagans and Trebango, and Owen Griffiths' *Vetch Veg Project*, Swansea. Elsewhere in the UK, *The Abandon Normal Devices* (peripatetic festival) and *Journeys with 'The Wasteland'* artist-community collaborative projects across Margate are two, of many, examples where place is the inspiration and the community is the creative engine.

### Phase two: The Distributed Gallery

The National Contemporary Art Gallery Wales will also be defined by a distributed set of 6-8 galleries across the nation.

Interested partners will be encouraged to join a scoping and advocacy phase, including engagement with the Boards and Governance structures to explore how the distributed model could be realised effectively. The identities of individual organisations should remain strong, yet the ambition should be to create a national, decentralized, greater whole. Ultimately we suggest that the 6-8 partners be selected via an open application process, encouraging cross-sector and interdisciplinary teams to make the case for their venue and community.

While maintaining their core identity, programmatic remit and approach and physical footprint, the organisations that become part of this National Contemporary Art Gallery Wales will be branded as such. They will be further distinguished by the construction of site-specific, semi-permanent extensions, refurbished galleries or the building of a neighbouring structure. They will collectively showcase the nation's growing collection of contemporary art and have the physical capacity and additional staffing and financial resource to display large-scale international touring exhibitions.

### Phase three: The HQ

The final interlinked phase will be the building of a National Contemporary Art Gallery Wales headquarters, a permanent,

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sustainable and unifying space serving as a porous and vibrant platform for contemporary art. This hub will enable Welsh citizens and tourists to experience immersive, world-class, new art created by living artists in Wales and abroad by actively brokering relationships with a global network of creators and the partner sites across Wales.

Preliminary costings suggest the capital spend to deliver all three phases will be in the range of £50m to £180m. For purposes of context, these estimates – which deliver a contemporary art offer across the nation – are in the same cost range as stand-alone cultural institutions built or in development such as the Hepworth (£35m), V&A Exhibition Road extension (£48m), Design Museum (£83m), Wales Millennium Centre (£106 m), Etihad Museum (£120m) and Tate Modern extension (£260m). In addition, these capital costs can be phased over longer periods.

For the delivery of Phases one and two, we recommend a national shared resource model with a centralised hub. The hub need not be physically located in any specific gallery and would be designed to ensure partner venues and communities benefit from increased capacity, expertise and facilitated national dialogue and planning. This hub would be defined by a collaborative leadership team who would

regularly ‘float’ between venues and sites. The team would be charged with co-developing and positioning the full National Contemporary Art Gallery Wales, defined as The National Canvas, The Distributed Gallery and the HQ. The leadership team would build the case for support, and co-plan exhibition and, collections development and conservation, educational and health programme development, fundraising, marketing, stakeholder engagement, advocacy, national and international profiling, and impact assessment.

The indicative annual operating costs for the centralised organisation co-developing and delivering Phases one and two, and establishing a Fellowship programme recommended below, would be in the region of £2.7m per annum minimum.

The annual operating expenditure of a physical national headquarters (Phase Three) could range anywhere from £2.5m and up (e.g. £15m), depending on the scale of the operation, the physical site, and how the team and programme is designed to interrelate with The National Canvas and The Distributed Gallery. The next stage of the Feasibility Study requires extensive business planning, based on modeling a number of scenarios (for example, assumed programme, defined sqm, projected visit numbers, days open,

location(s), etc).

The proposed indicative annual operating expenditure for the national entity is significantly higher than the average annual operating expenditure of most visual arts organisations in Wales. (For example, the ten visual Visual and Applied Arts Portfolio clients have an average annual operating budget of £490k, and these are most of the larger organisations in the visual arts ecosystem).

Arts Council of Wales’ total annual allocation to visual and applied arts (£1.7m revenue funding; £520k project funding) is less than what is proposed here. However the operating expenditure proposed (£2.7m for Phases one and two) includes financial resource that will be shared across The Distributed Gallery (i.e. 6-8 partner sites) and The National Canvas.

**Recommendation two:** An Advisory Panel is established to develop and drive the vision, concept and models forward. It is recommended that panel members include experts from both in and outside Wales, including those from the other Home Nations, as well as Visit Wales, MALD, representatives of Visual Arts Galleries Wales (VAGW) and Welsh Local Government Association (WLGA), investors and influencers. The new entity will have a high-profile steering committee with

strategic decision making authority; representatives of the Amgueddfa Cymru may serve on this Committee, and Committee members may serve on the Board of Trustees.

**Recommendation three:** In tandem, a National Youth Cultural Advisory Board is established, comprising people across Wales, aged 9-26 invited through an ‘open-call’. The National Youth Cultural Advisory Board will co-develop and help shape the delivery plan for the national contemporary art entity. The Youth Advisory Board demonstrates a clear commitment to empowering the next generation of artists, creative thinkers, patrons, board members and investors to design their version of a relevant national contemporary art gallery. It is worth noting that younger investors and millennials are also key constituents and emerging champions of the social impact movement.<sup>16</sup>

Arts Council of Wales has already committed to establishing an interconnected Youth Board as part of its operational plan, inspired, in part, by the experiences of The Roundhouse’s (see *Guided by Young Voices*). It is recommended that these Boards work in parallel, if not under the same umbrella.

<sup>16</sup> ‘Pro-business, but expecting more.’ (The Deloitte Millennial Survey, 2017)



# Executive Summary

**Recommendation four:** The Advisory Panel and Youth Cultural Advisory Board oversee the development and delivery of a series of collaborative concept workshops to explore, further design and strengthen the three phases in the imminent future. The agendas for these workshops will be co-designed, and depending on the topic, participants should be leading and emerging artists, curators, gallery directors, teachers, young people, and community activists. Representatives from the health, tourism and transport sectors, private developers and the private sector should also be engaged in this period, alongside enthusiastic world experts from a range of disciplines. The workshops will be designed to ensure that the detail of the three phases is robust, ambitious, practical and realisable. The concept workshops could culminate in a high-profile symposium, a 2-3 day event, bringing together the participants from throughout this stage to showcase and discuss their final recommendations.

**Recommendation five:** The Advisory Panel recruits and appoints a remarkable, accomplished director to develop and drive the Gallery forward.

**Recommendation six:** A fundraising feasibility study is critical if a National Contemporary Art Gallery Wales is to be

pursued in a subsequent stage. This is to ensure ongoing support is a realistic prospect, to explore how a national operating model will impact (positively and negatively) existing funding streams designated for visual arts in Wales, and to unlock new funding streams. The income model for a new national entity of contemporary art must be defined by revenue opportunities that benefit the wider sector.

**Recommendation seven:** The establishment of a Contemporary Creativity Endowment Fund is explored as an option for providing ongoing revenue support designed to empower the current and next generations of Welsh creative citizens. The Endowment Fund should be designed to support the alignment of the national contemporary art programme with the nation's priorities, including health, education, inclusion and economic growth. Investors in the Fund, including the Welsh Government, should believe that enjoying, being challenged by, and creating art needs to be embedded in the everyday lives of Welsh citizens.

The Endowment Fund could support the central organisation body, the creative clusters and a suite of fellowships and awards for nurturing creative talent, thought leadership and ideas identified in Wales and internationally. The Endowment

would require the unlocking of new funding and investment sources. Its success is dependent on a sophisticated fundraising campaign driven by champions well-placed to enthusiastically reframe the culture of giving – to one about investing in Wales' creative engine and beauty.

**Recommendation eight:** A Cultural Professional Fellowship will provide opportunities for Welsh emerging and established cultural professionals to work across the ecosystem. The Fellowship will welcome applicants from curatorial backgrounds as well as those of other disciplines, whose expertise is essential to a thriving arts and wider creative industries sector. This includes experience in education, marketing, business planning, law, policy, operations, technology, data science, design, retail, catering, human resources, fundraising and events management.

**Recommendation nine:** Sector-wide audience research should be delivered alongside Phases one and two to quantify the demand for any new entrant into the visual arts sector. It is essential that there is a more sophisticated understanding of the existing and potential market for contemporary visual arts venues, experiences and attractions in Wales, along with; the relationship between these venues. It is also important that motivations

and behaviours for attending are understood; that barriers to access are clearly identified; and that patterns across time and geography are tracked and leveraged. There is potential to ensure that organisations are empowered to collectively undertake sector-wide research that can be directly applied to making informed programming, marketing, positioning and business planning decisions at both national and local levels. A comprehensive training and research programme would provide an important legacy for the visual arts community.

**Recommendation ten:** The culture and tourism sectors take steps to align their strategies and work more closely together to:

- build on the existing tourism market in Wales;
- embed visual arts into the existing tourism campaign, The Wales Way;
- provide an experience distinctive to Wales that cannot be found elsewhere;
- deliver a combination of indoor and outdoor arts attractions that are closely linked to the different Welsh communities and sense of place to meet the expectations of international holiday makers.

**Recommendation eleven:** The advisory board develops and delivers a series of

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# Executive Summary

pilot collaborative projects – part of the 50 works in The National Canvas – in the immediate term. These projects will ensure investment already ring fenced for the Feasibility Study is used efficiently to move the National Contemporary Art Gallery Wales forward. The pilot projects should be shaped as action research – enabling the team to test different ways to convene and empower audiences, explore ideas for contemporary art projects and provide opportunities for collaborative working. Learning from these projects should be shared widely (for example, in publications, part of a symposium, facilitated discussions) and applied to the next set of National Canvas projects.

Opposite:  
James Richards, Migratory Motor Complex,  
six-channel audio, computer, modular  
seating system, 2017.  
Source: courtesy the artist and Chapter;  
Cymru yn Fenis Wales in Venice project  
Photos Mark Blower

# 1. Introduction



# Introduction

**“Modern art museums have been asked to fulfil three different roles: magnet of urban redevelopment, symbol of national prestige, and energizer of human capital in terms of creativity and innovation.”**

**Sharon Zunkin**

*“Every struggling post-industrial city has the same idea: hire a star architect (like Frank Gehry) to design a branch of a famous museum (like the Guggenheim), and watch your city blossom with culture. After all, it worked for Bilbao ... didn't it?”* **Chris Michael, The Guardian**<sup>17</sup>

## Background

In November 2017, experience design and consultancy agency, Event, was commissioned by the Museums, Archives and Libraries Division (MALD) of the Welsh Government, in partnership with the Amgueddfa Cymru and Arts Council of Wales to assess the feasibility of and potential models for a national contemporary art gallery for Wales. The study required the development of a guiding rationale and vision for a new national entity, and the subsequent development and assessment of a set of options best positioned to deliver that vision.

<sup>17</sup> Chris Michael, The Bilbao Effect: is 'starchitecture' all it's cracked up to be? A history of cities in 50 buildings, day 27 (The Guardian, 30 Apr 2015)

Building upon Light Springs through the Dark: A Vision for Culture in Wales – Welsh Government, (December 2016), the Study's three stakeholders had identified a gap in the current provision for the display of modern and contemporary art. The Welsh Government has previously commissioned a study, delivered in 2008, on two related concepts: The Future Display of Visual Art in Wales, headed by ABL Consulting, assessed the need for a National Gallery, which would offer extended display and ancillary space in an expanded and developed Cathays Park site at National Museum Cardiff, and a parallel but separate new National Centre for Contemporary Art, which would show contemporary art from Wales, art of international stature from elsewhere, and temporary exhibition work.

The ambition was to create a building of comparable quality to similar national institutions elsewhere in Europe. The Study reviewed and built on preceding reviews of the gallery facilities of Wales, the demand

for 21st-century facilities for the display of art, and their cultural, societal and economic benefits. The ABL study also recommended a second national contemporary gallery – essentially a “white box space” to house temporary exhibitions.

Neither the concept nor the accompanying options appraisal were carried forward, but the studies did provide a case for additional funding which informed the Welsh Government's £6m investment in the West Wing at National Museum Cardiff. Today the West Wing is dedicated to the display of temporary displays of modern and contemporary art from the Museum's collections and loans from other institutions (such as recently War's Hell: The Battle of Mametz Wood in Art and Silent Explosion: Ivor Davies and Destruction in Art) as well as externally generated exhibitions (such as the biennial exhibition and prize, Artes Mundi, founded by William Wilkins in 2002).

The 2008 Report gave impetus and added financial support to contemporary gallery

infrastructure projects, supplementing the Arts Council's drive to create a spread of 21st-century spaces around Wales. A decade on from the 2008 Report, National Assembly Wales collectively recognised that a new Feasibility Study offers an opportunity to review the existing ecosystem and infrastructure for the visual arts in Wales and assess potential constraints on any future development.

National Assembly Wales also identified the critical need to define an ambition and core purpose for a national institution of contemporary art. While Amgueddfa Cymru holds the national collection of contemporary art, of the four neighboring nations, three have much more significant dedicated facilities for showcasing modern and contemporary art (Figure 1).

# Introduction

## Brief

Event was charged with identifying a viable model for a new National Contemporary Art Gallery Wales that aligns with the requirements and ambitions of the visual arts sector in Wales. This included the need to assess the:

- Appetite for a national entity;
- Current visual arts ecosystem in Wales;
- Current needs and ambitions of individual visual arts organisations, artists and art schools;
- Policy landscape;
- Profile, needs and motivations of existing and potential audiences;
- Key stakeholders and their role(s);
- UK and international benchmarks in programming, infrastructure and positioning.

The Study was originally envisaged as a Feasibility Study, but the Steering Committee recognised the importance of first developing a concept rationale for the National Contemporary Art Gallery Wales

Arts Organisation	Total Site	Total Internal Floor Area	Exhibition Space	Ancillary spaces
Tate Modern, England	3.43 hectares	34,500sqm	7,827sqm gallery suites 3,300sqm Turbine Hall 1,300sqm special exhibition suite	240 seat auditorium, two cafés to seat 240 and to seat 170 plus 30 in the bar area; three shops; an education area; a Members Room, offices, handling area
Switch House Extension, Tate Modern, England	Included in the above	23,000sqm	7,000sqm of exhibition space dedicated to display cutting-edge contemporary work from across the world and more of the Tate's Collection; two new 'oil tanks' performance areas	1,567sqm of learning space
Scottish National Gallery of Modern Art, Scotland	4.8 hectares	TBC	Modern One: 12 exhibition spaces Modern Two: 7 exhibition spaces	2 cafes and sun terrace, 2 shops, Paolozzi Studio, reading room, library, print and drawings study room
IMMA, Dublin	10.52 hectares	TBC	TBC	Cafe, shop, lecture room, Johnston Suite, project spaces, courtyard, garden galleries

Figure 1: Dedicated national facilities for modern and contemporary art  
Source: Event, April 2018



# Introduction

and a viable supporting structural model for delivery.

As such an options appraisal was undertaken, developing and assessing options that would be best placed to achieve the ambition were identified for the National Contemporary Art Gallery Wales. At this stage, the Study excludes a locations and site analysis and fundraising study, with the expectation that a subsequent phase would deliver a comprehensive feasibility study.

## Methodology

Event's approach and methodology was designed to collaboratively establish a case and identify a model for a national gallery that celebrates and responds to the needs of 21st century art, artists and audiences. To deliver the feasibility study and options appraisal Event:

### 1. Undertook a contextual analysis:

- Consulted 84 stakeholders and members of the visual arts sector, including artists, arts and cultural organisations, universities/art schools, funders, national institutions, local authorities and the government (Appendix 1);
- Visited 30 galleries and universities across Wales and 7 outside Wales (Appendix 2);
- Facilitated workshops with the Visual

Arts Galleries Wales (VAGW), and representatives of the Amgueddfa Cymru Youth Forum and other key stakeholders;

- Reviewed policy and research papers (Appendix 3);
- Examined available audience data for Wales to assess the existing and potential audiences, both to inform the concept and to build a viable operating/business model;
- Identified the type of sector-wide audience data that should be collected, analysed and applied regularly moving forward;
- Mapped the publicly funded visual arts galleries in Wales in relation to the wide contemporary art ecosystem;
- Researched UK and international benchmarks in terms of positioning, models, capital and operating costs, models for curatorial and educational practice, and governance.
- 

### 2. Developed the national entity's purpose and function

### 3. Undertook an options appraisal:

- Developed a long-list of twelve options that could be structured to deliver this vision (Appendix 6);
- Developed a set of weighted criteria in order to assess each option and to identify the preferred model;

- Developed a dynamic scoring sheet that enabled the Steering Committee to score the different models to assess their viability and ambition;
- Undertook an independent options appraisal based upon the agreed weighting and criteria of the Steering Committee.

### 4. Proposed a set of recommendations for a viable model for a National Contemporary Art Gallery for Wales, presented in Chapter 5 and a set of recommended next steps.

## Assumptions and Definitions

For the purpose of this study a number of parameters were agreed with the Steering Committee. These are as follows:

### Governance/Ownership

- The new entity is in the family of Amgueddfa Cymru and is governed by the Amgueddfa Cymru Board of Trustees;
- The new entity will have a high-profile steering committee with strategic decision making authority; representatives of the Amgueddfa Cymru may serve on this Committee, and
- Committee members may serve on the Board of Trustees;
- The new entity will require an appointment of a high profile senior director reporting directly to the Amgueddfa Cymru Director General.

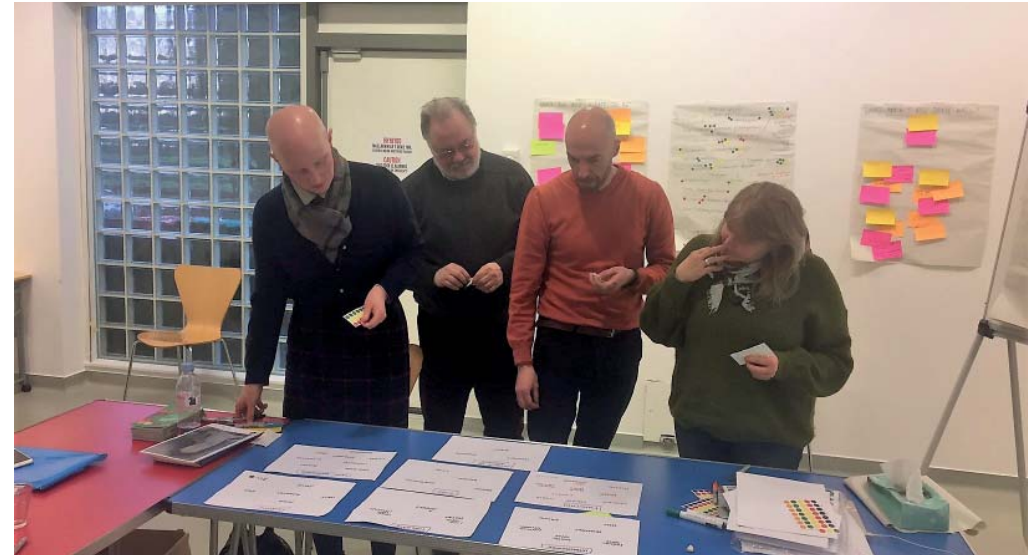
## Arts Council of Wales-Amgueddfa Cymru Strategic Partnership

- There is an opportunity for a formalised strategic partnership between Arts Council of Wales and Amgueddfa Cymru – National Museum Wales in developing and delivering the contemporary arts entity.

## Collections Access and Policy

- The national collection of contemporary art, under the care of Amgueddfa Cymru, will be available for partners to borrow, interpret and display;
- Opportunities for sharing the National Library of Wales modern and contemporary collection and the People's Collection, alongside the Amgueddfa Cymru's national collection of contemporary art will be explored separately, but are a key part of collections-sharing;
- National contemporary 'art' is not being confined to one medium, but encompasses all forms of contemporary art – including visual art, design, craft, performance art, film and digital and cross-medium;
- Modern art is defined as works created from late 19th Century through to the late 20th Century;
- Contemporary art is defined as current practice, created by artists who are alive and working today;

# Introduction



Consultation workshops with Visual Arts Galleries Wales (VAGW) members in Cardiff and Newtown, Wales  
Source: Event, January 2018

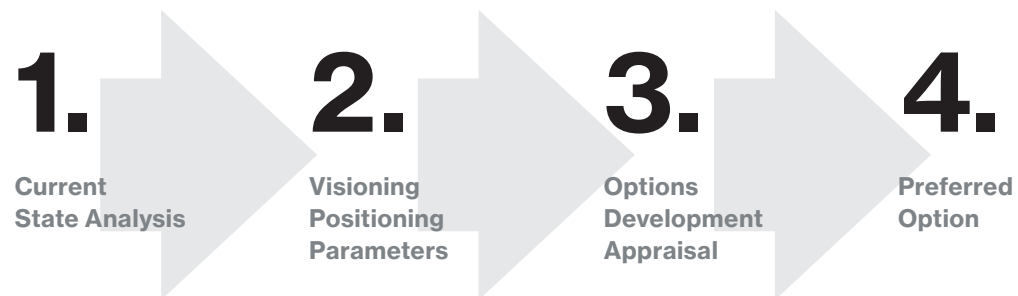


Figure 2: Event's Methodology

# Introduction

- Any new proposed Gallery must meet UK Museum Accreditation standards.

## Financial Projections

- Figures presented in this report for both capital and operating expenditure are indicative only, based on benchmarks and preliminary scenario modeling.
- The expectation is that any subsequent stage to this study should include full business planning based on modeling a number of scenarios (for example, curatorial and public programme, defined sqm, annual visitors, days open, location, etc).

## The Models

The models developed take the form of both building-based and building-less options, multiple sites – existing or new – and/or a service or partnership agreement.

## Report Structure

Chapter 2 provides findings and implications; Chapter 3 provides an indicative vision and priorities; Chapter 4 presents the options approach; Chapters 5 and 6 present Event's recommendations and potential risks; Chapter 7 provides next steps.

The Appendix includes the consultation list; site visits, bibliography and figures included in the document; detail of the long-list of

options, as well as further information of the market and example visions and missions from other national and regional art galleries from across the world.

The anonymised quotations throughout the report are drawn directly from confidential stakeholder interviews and workshops undertaken by Event, unless otherwise noted.

The study was guided by a Steering Committee led by Peter Owen (Head of Museums, Archives and Libraries Division, Welsh Government) with colleagues David Alston (Director Arts), Arts Council of Wales), David Anderson (Director General, Amgueddfa Cymru), Nick Capaldi (Chief Executive, Arts Council of Wales), Kath Davies (Director of Investment and Funding Services, Arts Council of Wales), Lesley-Anne Kerr (Head of Museum Development, MALD), and Nick Thornton (Head of Fine Art, Amgueddfa Cymru)

Representatives of VAGW (Visual Arts Group Wales, the Professional Association for venues and organisations in Wales that both produce and present contemporary visual arts), co-chaired by Chris Brown (g39) and Steffan Jones Hughes (Oriol Davies) were involved in a number of workshops and were kept informed throughout the study's duration.

This study was delivered and authored by Lucie Branczik, Project Executive and Becky Schutt, Senior Associate of Event. Support from the Event team included James Alexander (CEO), Mark O'Neill (Senior Advisor), Esther Dugdale (Creative Director), Stuart Williams (Art Director) Antonio Porto (Graphic Designer) and Felicity Hearn (Researcher).

The co-authors are grateful to the Steering Committee and the wide range of consultees in Wales and the wider UK, who supported the development of a series of options for a new gallery that are as authentic as they are bold; as strategic as they are alluring; as pragmatic as they are ambitious.

Opposite:  
Bedwyr Williams, Tyrrau Mawr, 2016  
Artes Mundi 7, National Museum Cardiff, 2016  
Source: Courtesy of the artist and Limoncello Gallery  
Source: Arts Council of Wales



## 2. Findings and Opportunities



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# Findings and Opportunities

This chapter presents the context and our analysis of five core themes – Contemporary Art in Wales; Supply; Demand; Key Contexts; and Sector Ambition. This context and analysis directly informed the development of the purpose; the 12 options for a new national gallery of contemporary art (Appendix 6); the criteria and weighting in which to assess these options (Chapter 4); and our final recommendations for a national gallery of contemporary art (Chapter 5).

The context provided here is essential to understand in order to ensure that any new national gallery is relevant to today and tomorrow's audiences and artists; authentically embedded into the existing visual arts ecosystem; and aligns with the ambition and aspiration for the nation.

The chapter is ordered as follows:

## **Contemporary Art in Wales**

- Contemporary Art and Artistic Practice in Wales.

## **Supply – Visual and Applied Arts Ecology**

- Visual and applied arts ecology in Wales;
- National and international profile;
- Artist Professional Cycle;
- Content and Collections.

## **Demand – Audiences**

- Existing visual and applied arts audiences;
- Creative education;
- Potential cultural tourism market.

## **Key Contexts**

- Economic case for culture and creativity;
- Capital investment and projects in the pipeline;
- Exhibition and storage space;
- Operating model and business model;
- Social case and growth of impact investment;
- Health and well-being agenda;
- Education, creativity and citizenship

## **Sector Ambition**



# Contemporary Art in Wales

“From encyclopaedic ‘cabinets of curiosity’, to echoing cathedrals for the larger-scale work (and reputations) of artists, museums are now entering a third age as collaborative spaces, where artists, audiences and curators interact in the co-production of culture and value.”

Adam Price AM, Carmarthen East and Dinefwr

## Art and Artistic Practice

### What makes Welsh contemporary art distinctively Welsh?

The Welsh landscape and language has deeply informed the contemporary visual arts practice in Wales. Many interviewed noted both contemporary artists’ passion for environmental practice and the Welsh landscape as a major source of inspiration and material. ‘The landscape as muse’ follows a long-standing tradition in Wales:

*“The qualities of the landscapes of Wales lie at the heart of the country’s power over artists – wildness, ancientness, vastness, strangeness.”*<sup>18</sup>

As one Arts Leader stated:

*“[In Wales] There is a realist approach to portraying the environment. It’s gritty, unidealised, not emphasising any style. Just honest. That’s distinctive in Britain. There is something coherent going on there.”*

<sup>18</sup> Peter Wakelin, *Romancing Wales: Romanticism in the Welsh Landscape since 1770* (2016)

Living artists who reflect Wales and its landscape include North-west Wales artist Darren Hughes who paints impasto colourful Welsh landscapes around his home; Kevin Sinnott who portrays his Wales’, communities and life, highlighting the vibrancy of the south Wales valleys; Welsh painter and printmaker, Mary Lloyd Jones, inspired by the scarred landscape associated with a legacy of lead mining and the Welsh language. Many other artists, some more populist and some more critically-acclaimed, included among many others including, Mike Carter, Helen Sear, David Nash, Tim Davies, Mike Perry, Deborah Butler, Gwyn Roberts, Peter Kettle, Janie McLeod, David Tress and William Wilkins. Together their works form a significant part of the Welsh contemporary art scene. These artists were preceded by the late Kyffin Williams, widely regarded as one of the most important Welsh artists of the 20th century, created enduring “dark, monumental landscapes of Snowdonia which came to assume an iconic status and

so too did the man,” accordingly to his 2006 obituary.<sup>19</sup> Today housed at Oriel Ynys Môn in Anglesey, where he lived for much of his life,<sup>20</sup> and his “*unselfish and energetic contributions to the artistic life of Wales did much to enhance its sense of distinctive cultural identity.*”<sup>21</sup> and currently on show at the National Library of Wales, Williams’ landscapes are considered archetypal.

Beyond landscape, diversity in artistic approach, the use of mixed-media, new materials, ephemeral processes and immersive experiences are distinctive factors in contemporary art today; Welsh artists are no different in their interests and approaches to the broader frame of contemporary UK art practice. This is demonstrated by Holly Davey’s sculptural explorations of imagined reality; Peter Finnemore’s photographic and

<sup>19</sup> Rian Evans, *Sir Kyffin Williams Obituary*, The Guardian, 3 September 2006

<sup>20</sup> Rian Evans, *Sir Kyffin Williams Obituary* (The Guardian, 3 Sept 2006)

<sup>21</sup> Kyffin Williams, *Across the Straits: An Autobiography* (Duckworth, 1973)



Holly Davey, *The Conversation*, mixed media installation, at g39, Cardiff, 2017  
Source: Holly Davey  
Koan Exercises, 2004  
Source: Peter Finnemore

# Contemporary Art in Wales

performance based works about home and memory in a Welsh cultural context; Iwan Bala's imagined maps examining connections between Welsh myth and current issues: *"nationhood, identity, culture, and the irrevocable decline of the language"*<sup>22</sup>; and Bedwyr Williams' mixed-media humorous critiques of everyday life. Ephemeral works of art, and those that focus on the process of creation beg questions about if, and therefore how, museums today can collect the uncollectable. This is something that Amgueddfa Cymru is already beginning to consider, as evidenced most recently by the Icelandic artist, Ragnar Kjartansson's, *The Sky in a Room*, performance exhibition and acquisition into the Amgueddfa Cymru's contemporary art collection, made possible by the Derek Williams Trust Artes Mundi Purchase Prize (£30,000) and support from the Art Fund.

Consultees highlighted the need to recognise that any new contemporary art gallery should enable and promote cross-disciplinary collaboration as a way of exploring national identities. As one artist explained,

*"Poetry has a longer continuum. So I'm looking at core identity, essence of Wales and Welshness—over the centuries by working with contemporary poets."*

<sup>22</sup> <https://www.iwanbala.com/node/504>

Cross-disciplinary collaborative artists include Iwan Bala - who has collaborated with poet Menna Elfyn and Angharad Jenkins (poet Nigel Jenkins' daughter) - and Susan Adams - who has led a collaborative project with contemporary voice-hearers in Wales. Another recent example is artist David Garner whose performative sculptural work *Call and Response* 2015 - staged in the Chartist Cave near Trefil - saw a collaboration with composer and harpist Rhodri Davies. This type of collaboration is also seen in the National Theatre Wales productions where artists, writers, designers and creative thinkers are encouraged to generate ideas and be part of the extended National Theatre Wales team.

Forward-thinking practices in collaboration and audience engagement, including a rethinking of curatorial authority and co-creative programming, are being advanced by artists and curators in Wales' national, regional and local visual arts organisations. Such practice and organisational approaches include:

- Artist Sean Edwards' everyday-object, sculptural work invites audiences to play a role in its making. They tend to be realised as in-progress works, which are only completed in the exhibition space – undermining the role of the gallery 'presentation' space, making it a 'process' space;

- PEAK, based in the Black Mountains, works with professional artists and communities responding to the rural environment;
- *Who Decides?* (October 2017 - September 2018), a National Museum Cardiff exhibition curated by people from The Wallich, a charity supporting people who have experienced homelessness in Wales, and;
- Ty Pawb in Wrexham, opened in March 2018 deploying the architectural concept of 'baggy spaces' to create a new model that "offers looser and more experimental space and socially-engaged programmes that surpass public expectations". As coined by Ty Pawb Architects Featherstone Young, "the 'baggy space' concept is about touching an environment just enough, or as little as possible, to enable others to fill the gaps, to garner ownership and create a place that can be used habitually, and open up the potential of useful, meaningful experiences."<sup>23</sup>

<sup>23</sup> Sarah Featherstone and Jo Marsh, *Designing and Programming in Baggy Space: a case study of the Oriel Wrexham People's Market project*, 2018



Eton mess (The Dis-united Kingdom)  
2016/18 Mixed media on Indian Khadi paper. 56x76 cm

Source: Iwan Bala

*Who Decides?* National Museum Cardiff

Source: Event

# Contemporary Art in Wales

Consultation also confirmed the clear passion for authentic, socially-engaged practice, often taking place outside the traditional gallery setting, a shift that is noted more broadly in cultural discourse and emerging funding and network opportunities.<sup>24</sup> As one Museum Director commented,

*“There is a real sense of dynamism in Wales. It is really social. It’s not just art, but engagement, collaboration, new models, and the ruralness of these models.”*

*“New models for audience engagement, exploration of exhibition and audience: production, co-curation and collaboration.”*  
**Curator and researcher**

Yet others emphasised that we are returning to our pre-modern viewing habits (‘What happened to the active, participatory ethos that defined Western [arts] audiences for 2,000 years?’)<sup>25</sup> Wales has a long-standing tradition of socially-engaged practice:

*“There are long roots in social enterprise [in Wales] that go right back. There is a*

*resurgence in community art.”*

Artists and curators alike asserted that the process of making art was as important – if not in fact more important – than the final product.

*“It is not about an artefact it is about the participatory process, the relationship between artist, art and audiences.”*

*“There is a move away from elitism to a more egalitarian practice.”* **Museum Director**

*“There are some really exciting initiatives being developed by curators in Wales. How can these be recognised?”* **Artist**

Several site visits exemplified this creative process in action, including:

- g39, a contemporary gallery co-founded by artists Chris Brown and Anthony Shapland in Cardiff in 1998, hosts a weekend open studio allowing audiences access to the process as part of their annual UNIT(e) programme;
- The Kitchen, a creative, flexible social space, where art, performance, craft and film were made, shared and inspired in Oriel Davies for three months in 2018, is emblematic of this approach. As the exhibition material states, *“Designed as a flexible environment for a wide range of*

*activity, The Kitchen continuously adapted and changed over the four months as visitors, artists and community groups create and share their work.”;*

- Miles of Creativity, a group exhibition<sup>26</sup> at MOSTYN, explored the creative act and its relationship to the gallery’s home town of Llandudno. As well as exhibiting local creative trades not traditionally shown in an art gallery, the exhibition included a studio embedded into the gallery space. Here contemporary sculptor Nick Elphick worked live on a number of powerful pieces, including a self-portrait exploring his own struggles with body dysmorphia, and discussed his evolving work and the impulses behind it with visitors.

Ideas:People: Places, Arts Council of Wales’ programme, provides funding for a small portfolio of ambitious, genuine community-led projects. The £2.5m programme, launched in 2014, is designed to embed the arts into new ways of working that generate cross sector collaboration, test new ideas and partnerships and inspire communities to re-imagine their



UNIT(e) programme, g39, Cardiff  
Source: g39  
The Kitchen, Oriel Davies, Newtown  
Source: Event  
Nick Elphick, MOSTYN, Llandudno  
Source: Event

<sup>24</sup> See for example, the Calouste Gulbenkian Foundation’s Inquiry into the Civic Role of Arts Organisations; the Barbican Centre’s establishment of the Co-Creating Change network, for artists, producers and community partnerships and supported by Arts Council England through their Ambition for Excellence Fund

<sup>25</sup> Lynne Connor, In and Out of Dark ;Ed. Steven Tepper and Bill Ivey, A Theory about Audience Behavior from Sophocles to Spoken Word (New York, Routledge Press, 2007) 79-100

<sup>26</sup> Featuring artists Beacon Garage, Trish Bermingham, Lin Cummins, Wendy Dawson, Tim Dickinson, Glyn Ellis, Nick Elphick, Julia S. Greaves, Lizzie Hughes, Mark Hughes, Anna Jones, Richard Cynan Jones, Patrick Joseph, Judith Bond Cakes, Barry Morris, North Wales Vapour, Pea J. Restall, Miguel Roque, Mike Ryder, Alana Tyson, Alan Whitfield, Wild Horse Brewery, Emrys Williams, Gwyn Williams, Susan Williams, Sandra Wynne



# Contemporary Art in Wales

environment in a creative and empowered way. 29 applications were received at the launch of the scheme and seven projects received a three-year grant, including:

- Confluence, a creative collaboration between Planed, SpacetoCreate, Idea Architects, Transition Haverford West and Pembrokeshire County Council, reimagines the the ancient port of Haverfordwest as a vibrant and distinctive market town, reconnected with its river, in full flow and charged by the creativity of its people;
- Arts & Minds is new arts & regeneration programme in Blaenau Gwent centred on neighbourhoods that form part of the extensive housing stock of Tai Calon Community Housing, the largest social landlord in the region;
- 'It's Art But It's Not' is a community regeneration project in the villages of Penygraig, Trebanog and Porth. Based in Rhondda Cynon Taf, this project is a three year partnership between Trivallis (one of Wales' largest registered social landlords), Valleys Kids and Artes Mundi, with the aim of putting art at the heart of community regeneration. The project has invited artists to work with communities to explore their surroundings in creative and interesting ways; this has led to the development of public art as well as new

ways to implement regeneration and environmental improvements.

As described by Paul Haywood, Dean of Academic Programmes at University of the Arts: Central Saint Martins and Visiting Professor of Creative Community Engagement at University of Salford, Ideas:People:Places brings together a vast range of people and perspectives:

*"As individuals, they may have any of a number of roles in life; artist, designer, cultural entrepreneur, curator, project manager, developer, local business, activist, community advocate, educator, and the list goes on, but they are all concerned about a shared place in time. They may have motivations that vary considerably but they have formed community mindful of shared values that describe humanity and portray the better aspects of human nature in relation to 'place'. This initiative and this nurturing of fresh communities of purpose has been and is a moment of change. That was its first intention. But it is change without trauma or rapid pace, it is gentle and evolutionary."*<sup>27</sup>

During consultations, some interviewed suggested that the visual arts discourse in Wales "is not critical enough", in part because of the small sector and the

personal relationships between artists. Some suggested that this is resulting in a churn of mediocre work.

*"Wales is small. Everyone knows one another too well. If someone says they don't like an artwork, it is as good as saying you don't like them."* **Established Artist**

Programmes such as g39's WARP are designed to provide a safe environment for artists to receive critical feedback with members of the g39 team or visiting artists. These sessions are available to all visual art practitioners regardless of previous training or academic level.

The majority of the artists interviewed felt that it was important to look beyond the traditional 'white box' designated for gallery space, with some artists emphasising that this environment was a much more challenging place in which to work because of both its ubiquity and its immutable boundaries. There was a distinctive desire expressed by many of those artists interviewed for compelling, non-traditional spaces that enable them to be responsive to the volume, scale and nuances of different environments. As one stakeholder commented, *"artists today are working against an architectural backdrop"* and those backdrops need to be varied.

*"The building shapes the artists' work. It gives them a blank canvas and inspiration."* **Gallery Director**

This can be seen, for example, in the works of experimental artist, Andre Stitt who is interested in the relationship of paintings to specific locations and environments and Sean Vicary who works place-sensitively to explore people's relationships with the natural world, place and landscape.

The consultation could only touch the surface of the interface between visual and applied arts, and any roll-out of the phases of the project could usefully explore this more given the strong presence of various types of Applied Art In Wales.

<sup>27</sup> Prof Paul Haywood, Reflections on Ideas: People: Places, Arts Council of Wales website

# Contemporary Art in Wales



## Art and Artistic Practice Implications and Opportunity

1. The land of Wales is both a longstanding muse and a point of differentiation; any new national 'gallery' can leverage this by providing contemporary artists with more opportunities to respond to and work within it;
2. The symbiotic, and evolving, relationship between contemporary artists, art and audiences, begs important questions about presentation/process spaces that should be addressed in a national contemporary art curatorial strategy and any physical building and space programme;
3. Visual arts audiences in the 21st Century have shifted from being passive observers and consumers to active creators and producers themselves - this focus is even more apparent in Wales. Any national contemporary art entity should ensure there are opportunities for audiences to be artists, artists to be audiences, encouraging all to co-reflect on the human experience;
4. Contemporary artists working in Wales today require more, and more diverse, platforms on which to show their work (see Exhibition and storage space, page 76). This includes both non-traditional art gallery spaces and the landscape, which could complement traditional institutional spaces;
5. The artistic process can be made more accessible and transparent to other artists and the general public and can offer opportunities for open dialogue about and constructive critique of the work;
6. A new 'gallery' focused on contemporary art should be co-designed with inter-sectoral experts (e.g. in Health and Education) to authentically deliver the Well-being of Future Generations (Wales) Act 2015, as well as other key policy papers including Culture and Poverty: Harnessing the power of the arts, culture and heritage to promote social justice in Wales (Baroness Kay Andrews OBE, March 2015).



WAGSTAFF'S, History Series exhibition at MOSTYN. March 2017.

Source: Lin Cummins

W is for Wallpaper

Ruthin Craft Centre 2015-16

Source: Dewi Tannatt Lloyd

# Supply: Visual and Applied Arts Ecology

## A Diverse Visual and Applied Arts Ecology in Wales

The Welsh visual and applied arts ecology<sup>28</sup> is diverse and evolving, comprising publicly-funded, commercial and grass roots art organisations. The sector is embedded within the rapidly growing creative industries. Our consultations highlighted that this sector in Wales is tight-knit and historically bound by the geography of the country. It is in part characterised by a small pool of passionate, professional curatorial staff and limited funding opportunities.

*“Everyone knows everyone. Wales is a small community of artists and arts organisations...”* Gallery Director

While a large number of consultees argued or suggested that Cardiff benefits from a disproportionately high concentration of arts organisations in the capital (Figure 4), the map of Wales (Figure 3) demonstrates that there is a healthy geographical spread

of visual and applied arts organisations across the nation.<sup>29</sup>

Arts Council of Wales has 67 organisations in its Revenue Portfolio of which ten are categorised as Visual and Applied Arts organisations, both building-based and building-less. A further 15 classify as Combined Arts and include a visual arts programme. There is a growing sector of small artist-led and project funded companies. Groups of young artists have also begun to supplement and challenge established organisations.<sup>30</sup>

Of the over 100 organisations shown in the maps, the vast majority offer free entry to permanent and temporary exhibitions. Most also offer free or low cost educational events and activities to ensure there are no or minimal financial barriers to audience access.

While a number of organisations, such as Aberystwyth Arts Centre, Chapter and The Riverfront, promote mixed arts use within their sites, there is otherwise very little crossover between the visual arts and other art forms. Further our research suggests there is little or no relationship built between the arts and sport and leisure sectors.

<sup>29</sup> Although every attempt was made to map the full visual arts ecology, please note the list may not be exhaustive, particularly with regards to small arts projects.

<sup>30</sup> ACW Investment Review

Many noted that while the sector is diverse and energetic, it does not make a national statement about the visual and applied arts, let alone a contemporary one:

*“We have some key organs but we lack a heart – we need a beat that is contemporary Welsh art.”* Arts Leader

*“There are different types of galleries across Wales, but they are regional galleries. There is nothing national.”* Artist

*“As with a football league, we need local, we need regional – and we need them to feed into the national. Yet our second league are struggling. They are coming up – but they are not thriving.”* Funder

*“Its crazy Cardiff is so badly served... the rest of Wales has beautiful spaces and it also needs to be included in this programme and research as Wales is geographically divided North to South. Mostyn, Glynn Vivian, Aberystwyth Arts Centre etc. to name but a few, are wonderful public galleries where homegrown artists could show and develop and expand their work as well as showing international established artists.”* Established Artist

It is notable that the vast majority of those interviewed did not characterise the current contemporary art offer at Amgueddfa Cymru or the National Library

Wales as the National Gallery of Contemporary Art, despite both institutions holding and displaying the nation's contemporary visual and applied art collections.

*“Not everyone knows Cathays Park is the national art gallery, or that it has contemporary collections.”* Artist

As one of the few who did consider these as such stated,

*“We already have a national contemporary art gallery. It is a very successful one. It is in Cardiff.”*

Both institutions are planning to undertake masterplans in the next year, so the underlying issues for why these national bodies are not recognised by the sector as the national contemporary visual arts spaces can be explored further.

It is crucial to note, however, that while Amgueddfa Cymru houses the national contemporary art collection in the National Museum Cardiff and delivers forward-thinking and well-received programmes such as Who Decides?, very few stakeholders interviewed considered the National Museum Cardiff to be the National Contemporary Art Gallery Wales. It was stated that with limited marketing budgets it is not marketed sufficiently in this context;

<sup>28</sup> Word ‘ecology’ used rather economy ‘offers a better approach, because it provides a comprehensible overview that does not privilege one type of value – financial value – over others that attach to culture.’ ‘Culture is often discussed as an economy, but it is better to see it as an ecology, because this viewpoint offers a richer and more complete understanding of the subject. Seeing culture as an ecology is congruent with cultural value approaches that take into account a wide range of non-monetary values.’ Whilst it is used in reference to culture in this paper this is true of the visual and applied arts in this context. As outlined in John Holden, The Ecology of Culture, A Report commissioned by the Arts and Humanities Research Council's Cultural Value Project (Jan 2015)



# Supply: Visual and Applied Arts Ecology

the mixed collections on site meant that the contemporary art offer is diluted; and given the nature of the building and collections it was considered to be more closely aligned to the museum and heritage offer.

## A Growing Grass Roots Culture

Grass roots initiatives, particularly in urban areas such as Cardiff, Swansea and Wrexham, are offering artists opportunities outside of the institutions to experiment and take initiative. In Cardiff alone there are more than 30.

*“There are some interesting artist-initiatives like ArcadeCardiff in the basement at Queens Shopping Centre. They handover space to artists but it is hand to mouth. It’s relatively low risk and in public spaces.”*  
**Curator**

*“There are more artists staying in Wales and building grass root communities to support them. Then hopefully [they will reach the] institutions and universities.”*  
**Artist**

*“Initiatives like g39... [demonstrate that] artists have to create their own thing... [There is] a lot of initiative and experimental art in Wales. Sometimes they don’t make it in the establishment, [but in these initiatives] there is no complacency.”*  
**Artist**

While there is an increase in sustainable grassroots practices and amateur activities

involving young people across the UK – 49,000 amateur arts groups in England alone<sup>31</sup> – consultations confirmed that young artists unable to gain access to institutions possess a level of open-mindedness and willingness to establish their own organisations.

When talking about Artes Mundi...  
*“It couldn’t have happened in Scotland... it is a reflection of the openness and freshness and willingness to start something new.”*  
**Arts Journalist**

However, there is a concern that this is borne out of the lack of contemporary space,

*“... we’ve lost two spaces... artists out of desperation have started doing their own [exhibitions].”*

Many interviewed emphasised that these artist-led initiatives are having a positive impact in their communities, including through their re-apportioning abandoned buildings (e.g. Old College in Aberystwyth) and vacant shops (e.g. ArcadeCardiff and its project space Three Doors Up; Undegon in Wrexham’s former JJB Sports shop, following the company entering administration in 2012). Consultations

<sup>31</sup> Hilary Ramsden, Jane Milling, Jenny Phillimore, Angus McCabe, Hamish Fyfe and Robin Simpson, The role of grassroots arts activities in communities: a scoping study (Dec 2011)

confirmed that these initiatives have been attributed with regenerating neighbourhoods and attracting newcomers to the area. Such projects have also enabled artists to build direct relationships with local audiences, fellow artists and the local environment. Artists are able to test out what appeals to a contemporary market, and respond and react directly.

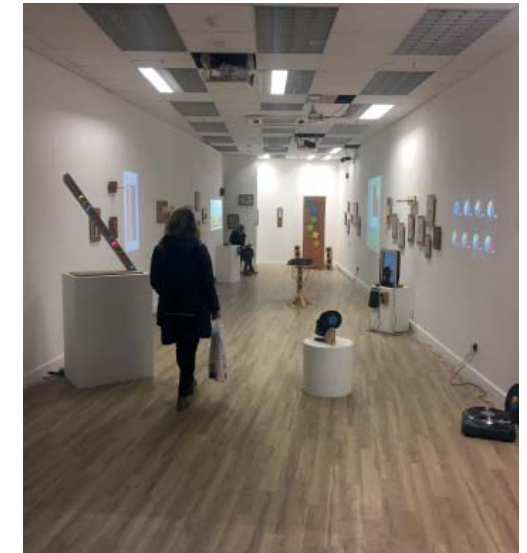
These identified benefits are echoed in research about artist-led cultural regeneration.<sup>32</sup>

*“Within Cardiff it feels like there are more artists actively living and working in the city, there are more independent galleries. It is becoming more confident.”*  
**Museum Director**

Some consultees stated that part of the reason these initiatives have been able to develop is because Wales is still relatively affordable, despite rent prices going up in Cardiff, certainly more affordable than other UK cities. During the consultations, some artists stated that they felt there was still a requirement for further investment into new work spaces:

*“What is needed is affordable art spaces – artist studios.”*  
**Artist**

<sup>32</sup> See, for example, Dan Thomson, Working Paper 48 Culture and regeneration, GLA Economics, What evidence is there of a link and how can it be measured? We can do much more together – it’s not so impossible, Pop Up People (2012)



Arcade Cardiff, Cardiff  
Source: Event, February 2018  
Martin Tinney Gallery, Cardiff  
Source: ArtRabbit

# Supply: Visual and Applied Arts Ecology



Chapter Arts Centre, Cardiff  
Oriol Davies, Newtown  
MOMA Machynlleth, Machynlleth  
Source: Event January 2018

Mission Gallery, Swansea  
Amgueddfa Cymru, Cardiff  
Source: Event, December 2017  
Old College, Aberystwyth  
Source: Aberystwyth University, 2018

# Supply: Visual and Applied Arts Ecology

Many artists' studios are located in their spare rooms, sheds and garages.<sup>33</sup> These under-the-radar spaces are showcased annually at Cardiff Open Studios Weekend (founded by artist Richard Higlett and now part of the Cardiff Contemporary festival), which enables the public access to the artist and artist-led group studios (Figure 4).

## Commercial art galleries

Many interviewed stated that the growth of the visual arts sector is dependent on parallel quality and vibrancy in the art ecosystem, including in art schools and the resulting development of a commercial market.

*"Unlike London or Glasgow, Swansea and Cardiff don't have a vibrant commercial scene, which alongside institutions is essential to drive a contemporary art market."* Contemporary Art Auctioneer

The contemporary commercial art market in Wales is limited, with approximately 12 commercial galleries operating across Wales, including Martin Tinney Gallery (est. 1992), Ffin y Parc House and Gallery (est. 2007), Kooywood Gallery (est. 2004) and Gallery TEN (est. 2010). These tend to be located within urban areas, particularly Cardiff (Figure 4).

*"Here are all these artists and they haven't a hope in hell of selling anything."* Museum Director

One Professor suggested that:

*"Artists are resisting the market and the idea of art as a commodity. They use it as a framework to resist. The irony is they have to make a living. Ironically you can make art that critiques the market."*

While the core of this Feasibility Study is not an examination of the commercial art market, its immaturity in Wales is notable compared to England, Scotland and Ireland. There is a relatively small portfolio of commercial art galleries operating across Wales, which some suggested in consultation is correlated with both an exodus of mid-career artists (see Artist Professional Cycle below) and a relatively small collector (and potential donor) base. A Gallery Director articulated:

*"The commercial sector is missing... We are lacking in support and philanthropy because there is a lack of collectors. The issues with the visual arts [in Wales] stem from this."*

While publicly subsidised galleries cannot sell art directly they are able to do so if they have a separate trading arm. There are a number of arts organisations in Wales doing this, providing access to the work of

living artists and earning revenues in the process. One innovative example is Plas Glyn-y-Wedd, which, due to the mixed nature of the arts is eligible and applies for public grants, while being a commercial gallery. While this is a point of differentiation, it is also a challenge as the gallery is unable to compete with the private galleries as income from art sales subsidises the 'non-commercial' activity onsite including exhibitions, installations and art projects.

Additionally, over 50 arts organisations in Wales participate in the pioneering Collectorplan scheme, set up by Arts Council of Wales in 1983. The scheme, UK's first, helps UK residents to buy original works of art and crafts by living artists through interest-free credit. Participating organisations include Galerie Simpson and Gallery/Ten as well as more established institutions such as Aberystwyth Arts Centre, Llantarnam Grange Arts Centre, Craft in the Bay, Oriel Lliw (Pontardawe Arts Centre) and Oriel Davies. Encouraging and developing personal collecting is a significant part of the Arts Council's strategy for supporting artists and making art and craft purchasing more accessible.



## Visual and Applied Arts Ecology in Wales Implications and Opportunity

1. While a diverse and regional set of institutions have been established and energetic grassroots initiatives are growing in Wales, there is a conspicuous gap in the market for a significant and lasting contemporary art presence at the national level.  
*"There are lots of artist groups in Cardiff and Swansea, but nothing contemporary at national level."* Artist  
There is an opportunity, if not an imperative, for any national art intervention to complement and build upon Wales' resource and assets, rather than destabilise or disregard what already exists.
2. Opportunities to buy original living artists' works, including participation in the Collectorplan, should be considered in the development of any National Contemporary Art Gallery Wales, both to continue the support for Welsh and international artists and enable purchasing by all audience groups.
3. There is an opportunity to explore the way in which the commercial arts sector in Wales could be developed in relation to any new institution, including the mechanisms and initiatives that could be put in place

<sup>33</sup> <https://www.a-n.co.uk/news/cardiff-open-studios-weekend-more-than-140-artists-across-the-city>



# Supply: Visual and Applied Arts Ecology

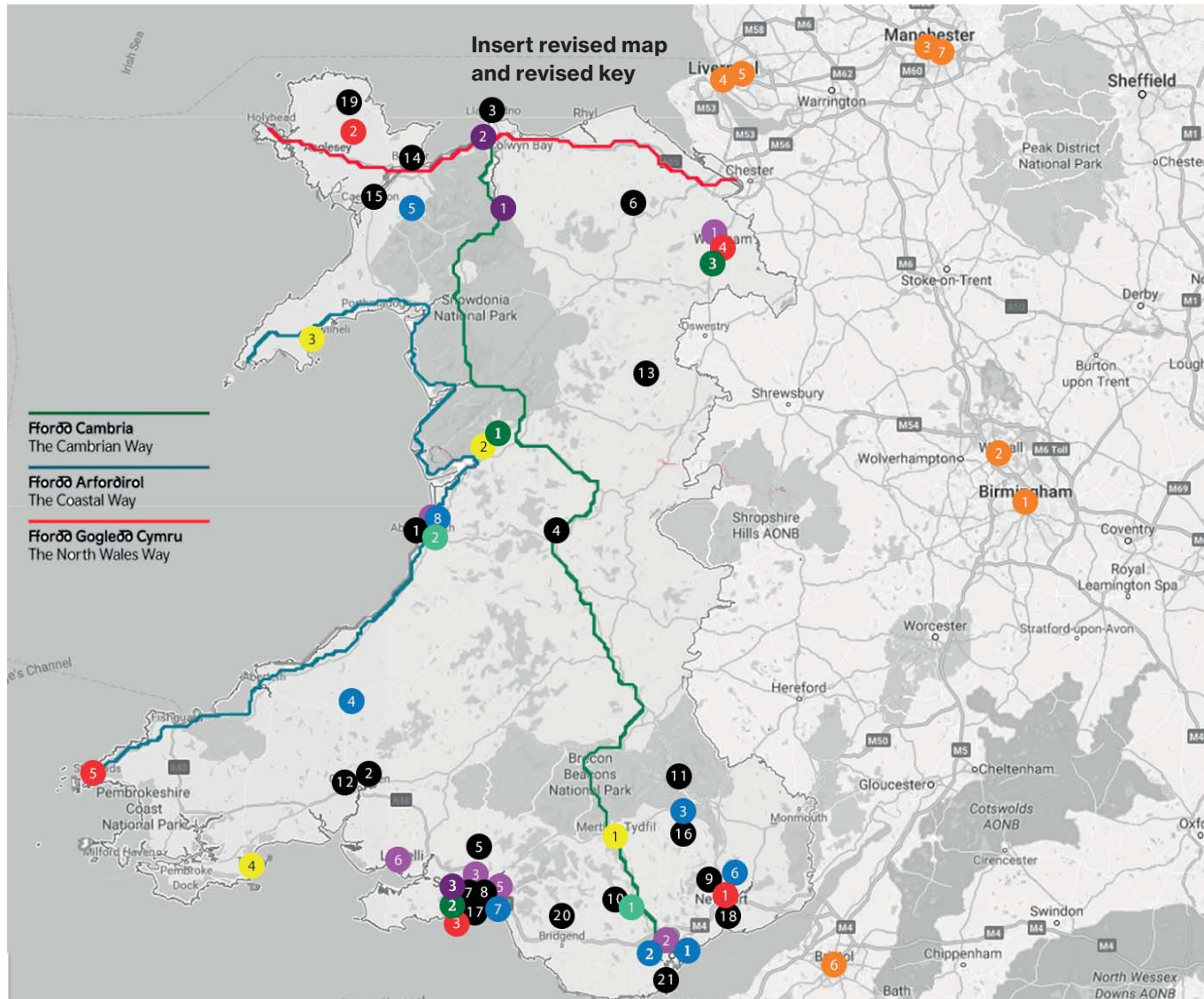


Figure 3: Supply map in Wales  
Source: Event and Bob Gelsthorpe, April 2018

# Supply: Visual and Applied Arts Ecology

Key:

## ● Nationals

- 1 National Museum Cardiff
- 2 St Fagans, Cardiff
- 3 Big Pit National Coal Museum, Pontypool
- 4 National Wool Museum, Llandysul
- 5 Slate Museum, Caernarfon
- 6 National Roman Legionary Museum, Caerleon
- 7 National Waterfront Museum, Swansea
- 8 National Library Wales, Aberystwyth

## ● Independent

- 1 Cyfarthfa Castle Museum and Art Gallery
- 2 MOMA Machynlleth
- 3 Oriel Plas Glyn y Weddwr
- 4 Tenby Museum and Art Gallery - remove
- 5 Bodelwyddan Castle
- 6 Oriel Brondanw, Gwynedd
- 7 Oriel Mwldan, Cardigan
- 8 Canolfan Ucheldre Centre, Isle of Anglesey, Holyhead
- 9 Oriel Q, Narbeth
- 10 Royal Cambrian Academy, Conwy

## ● Arts Portfolio Wales

- 1 Aberystwyth Arts Centre, Aberystwyth
- 2 Oriel Myrddin Gallery, Carmarthen
- 3 MOSTYN, Llandudno
- 4 Oriel Davies, Newport
- 5 Pontardawe Arts Centre, (Local Authority)
- 6 Ruthin Craft Centre, Ruthin
- 7 Glynn Vivian Art Gallery, Swansea (Local Authority)
- 8 Taliesin Arts Centre, Swansea
- 9 Llantarnam Grange Arts Centre, Cwmbran
- 10 Artis Community, Pontypridd
- 11 Peak / Arts Alive, Crickhowell
- 12 Arts Care Gofal Celf Ltd, Carmarthen
- 13 Arts Connection Cyswllt Celf, Llanfyllin
- 14 Pontio, Bangor University, Bangor
- 15 Galeri Caernarfon Cyf, Caernarfon
- 16 Head4Arts, Abertillery

- 17 Mission Gallery, Swansea
- 18 The Riverfront, Newport
- 19 Ucheldre Centre, Holyhead
- 20 Valley & Vale Community Arts, Bettws
- 21 Ffotogallery, Penarth

## ● Art Schools

- 1 School of Creative Arts, Wrexham Glyndwr University, Wrexham
- 2 Cardiff School of Art & Design, Cardiff Metropolitan University, Cardiff
- 3 University of Wales Trinity Saint David, Swansea College of Art, Swansea
- 4 Prifysgol Aberystwyth University, School of Art, Aberystwyth
- 5 School of Art and Design, University of South Wales
- 6 Coleg Sir Gar / Carmarthen School of Art, Carmarthen
- 7 The Welsh Academy of Art, Crickhowell, Powys

## ● Local Authority

- 1 Newport Museum and Art Gallery, Newport
- 2 Oriel Ynys Mon, Llangefni
- 3 Storiell, Bangor
- 4 Ty Pawb, Wrexham
- 5 Oriel y Parc Gallery & Visitor Centre, Saint David's
- 6 Parc Howard Museum and Art Gallery, Llanelli
- 7 Brecknock Museum and Art Gallery, Powys

## ● Grass Roots and Artist Studios

- 1 Articulture Wales, Esgairgeiliog
- 2 Elysium Gallery, Swansea
- 3 This Project (Undegun, Gallery 3B), Wrexham
- 4 Cinema & Co, Swansea
- 5 Greenspace Gallery, Carmarthen
- 6 Oriel Blodau Bach, New Inn
- 7 Rhod, Melin Glonc, Drefelin
- 8 Popty, Lawrenny
- 9 Colony Projects, Port Talbot
- 10 The Lab, Haverfordwest
- 11 Studio Cybi, Holyhead
- 12 Bloc, Gladestry
- 13 Swansea Print Workshop, Swansea

- 14 New British Art, Porthyrhyd
- 15 Rob Piercy Gallery, Porthmadog
- 16 Oriel Bodfari Gallery, Denbigh
- 17 Tina Holley Gallery, Llandudno
- 18 The Bay Gallery, Conwy
- 19 Alison Bradley Gallery - Betws y Coed
- 20 76m2 (formerly the kickplate gallery), Bargoed
- 21 The Reading Room, Manorbrier
- 22 Mam's Fridge Gallery, Treorchy
- 23 Coed Hills Rural Artspace, St. Hilary
- 24 Balaclafa, Caernarfon
- 25 Studio18, Bridgend
- 26 The Studio (Emrys Williams' Studio), Llandudno
- 27 Exist Skatepark, Swansea
- 28 Helfa Gelf Open Studios, North Wales

## ● Commercial Galleries

- 1 Ffin y Parc Gallery LLanrwst
- 2 King Street Gallery, Carmarthen
- 3 Attic Gallery, Swansea
- 4 Oriel Bach Gallery Mumbles, Swansea

## ● University Museums

- 1 Oriel y Bont, University of South Wales, Pontypridd
- 2 Aberystwyth University, School of Art Gallery and Museum, Aberystwyth

## ● Cross Border Galleries

- 1 IKON, Birmingham
- 2 New Art Gallery, Walsall
- 3 HOME, Manchester
- 4 Tate Liverpool
- 5 Walker Art Gallery, Liverpool
- 6 Arnolfini, Bristol
- 7 Whitworth Gallery, Manchester
- 8 The Royal Standard, Liverpool
- 9 CBS, Liverpool
- 10 Spike Island, Bristol
- 11 East Bristol Contemporary, Bristol
- 12 The Sidney Nolan Trust, Presteigne

Additionally, there are Public Art Commissioners, including Studio/Response, Wales-wide and Datrys, North Wales.

Those organisations identified as publicly funded (black) are subsidised by at least one of three sources: the Heritage Lottery Fund, local authorities and Arts Council of Wales.<sup>34</sup> Arts Council of Wales has 67 organisations in its revenue portfolio of which ten are purely visual/applied arts organisations, both building-based and building-less.

The Welsh Government has allocated £22.68m Grant-in-Aid directly to Amgueddfa Cymru for 2018-2019.<sup>35</sup> Forming part of the Government's total Grant in Aid investment, the funding is designed 'to protect culture and deliver services' and includes support of National Library of Wales (£10.83), National Botanic Gardens (£580K) and the People's Collection Wales digital heritage programme.<sup>36</sup>

<sup>34</sup> ACW receives £31.391m directly from the Welsh Government to distribute

<sup>35</sup> Grant-in-aid to Amgueddfa Cymru has increased from £20.8m in 2016-17 to £21.8m in 2017-18 and £22.68m in 2018-29. The figure for 2017-18 includes £269,000 transferred from the museum's specimen purchase fund (the fund is halved for 2017-18 to £269,000 from £538,000 in 2016-17), which the Welsh government reallocated to compensate museum staff for changes to their contract for weekend working, and a one-year only additional uplift of £730,000. Although it is a slight uplift on the previous year, it is down from £23m in 2015-16. In all, the museum saw a 33% real-terms cut to its budget from 2010-15. Capital maintenance funding in 2017-18 is £4,989,000. Welsh Government Final Budget 2016-17, 2017-18 and 2018-19

<sup>36</sup> <http://gov.wales/newsroom/culture-tourism-sport/2017/170515-45m-welsh-government-funding-to-support-wales-national-cultural-heritage/?lang=en>

# Supply: Visual and Applied Arts Ecology

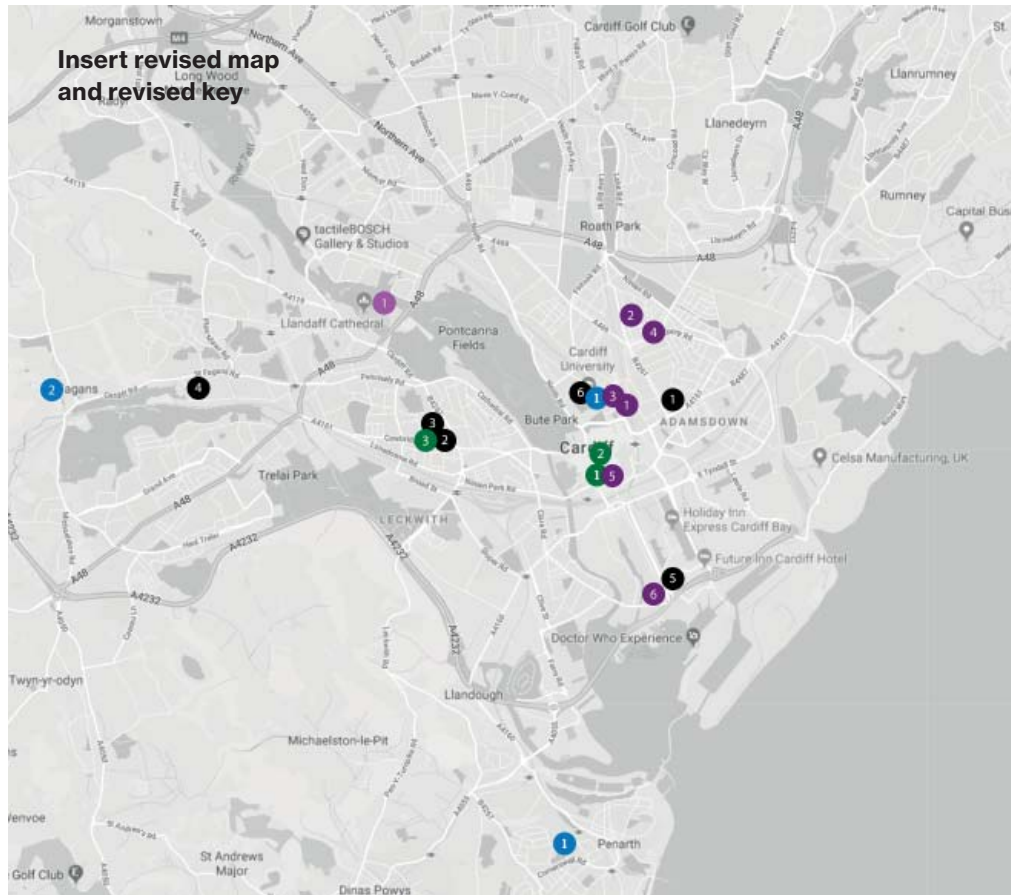


Figure 4: Supply map in Cardiff  
Source: Event and Bob Gelsthorpe, April 2018

Key:

## Nationals

- 1 National Museum Cardiff, Cardiff
- 2 Amgueddfa Cymru St Fagans

## Independent

- 1 The Gate Arts Centre

## Arts Portfolio Wales

- 1 G39
- 2 Ffotogallery, Penarth
- 3 Chapter Arts Centre
- 4 Disability Arts Cymru
- 5 Craft by the Bay
- 6 Artes Mundi

## Art Schools

- 1 Cardiff School of Art and Design, Cardiff Met

## Commercial Galleries

- 1 Martin Tinney Gallery
- 2 Gallery/10
- 3 Kooywood Gallery
- 4 The Albany Gallery
- 5 Castle Fine Art
- 6 Bay Art Gallery
- 7 Whitewall Gallery
- 8 SHO gallery and shop

## Grass Roots and Artist Studios

- 1 Arcade Cardiff
- 2 Boiler House Graffiti Gallery
- 3 The Boneyard
- 4 The Broadway Drawing Schools
- 5 Butetown Artists' Studios
- 6 Cardiff Made
- 7 Cardiff Print Workshop
- 8 Dorcas Pennyfather's Studio
- 9 Fireworks Clay Studios
- 10 Ian Smith's Studio
- 11 Inkspot Studios
- 12 Jacqueline Alkema's Studio

13 Jo Berry's Studio

14 King's Road Artists Studios

15 Lynne Cartridge Fine Art Studio

16 Made in Roath

17 Morgan Arcade Studios

18 Off the Wall Gallery

19 Oriel Canfas Gallery and Studios

20 Philippa Brown's Studio

21 The Printheus Workshops and Studios

22 Print Market Project

23 Rabab Ghazoul

24 Red Door Studios

25 TactileBOSCH Studios

26 Three Doors Up

27 Warwick Hall Studios

28 Studio B, Tudor Lane, Riverside, Cardiff

29 Ruin Cafe, Cardiff

30 Rat Trap, Cardiff

31 Spit & Sawdust, Cardiff

32 The Kim Fielding Award, Cardiff

33 Blue honey, Cardiff

34 Milgi, Cardiff

# Supply: Visual and Applied Arts Ecology

Sample Arts and Cultural Organisation	Spaces (Sqm)							
	Total Venue Size	Public Collection (Permanent galleries)	Public Collection (Temporary galleries)	Public Non Collection (Education)	Public Non Collection (FoH e.g. foyer, retail, F&B, auditorium)	Non Public Collection (artist studios)	Non Public Collection (Stores, conservation)	Non Public Non Collection (BoH admin, technical rooms)
Aberystwyth Arts Centre (Aberystwyth University), Aberystwyth	-	0	335 (+35m running wall)	0	Shared spaces	9,000	65	Unavailable
Chapter Arts Centre, Cardiff	7,132	0	375	0	1,131	1,497.25	0	1,785
G39, Cardiff	706	0	296	53	60	196	5	96
Glynn Vivian, Swansea		154.8	984	123.7	322.7	0	482.7	724
Llantarnam Arts Centre, Cwmbran	533	150	84	102	130	0	42	25
Mission, Swansea	141	0	57	41	43	0	0	0
MOMA Machynlleth, Machynlleth		-	-					
Mostyn, Llandudno	2,000	0	403	43.37	374.57	0		
National Library Wales, Aberystwyth	34,998	0	1,686	0	1,598	0	834	5,590
Newport Museum and Art Gallery, Newport	725.5	488	21	0	505	0	211	Unavailable
National museum Cardiff (post 1900-collection)	4,000	360	680	120	100 + shared spaces	0	850	Shared spaces
Oriel Davies, Newtown	563.4	0	208	93	54	0	30	121
Oriel Plas Glyn-Y-Wedd, Pwllheli	3,194	-	-					to
Oriel Ynes Mon, Llangefni	1707.65	323.86	616.61	100.24	148.9	0	186.84	186.84
Ruthin Craft Centre, Ruthin	1,566	0	287	216	251	342	0	134
Ty Pawb, Wrexham	-	0	364.25	48.59	536.29	75.06	0	81.31

Figure 5: A non-exhaustive sample of the arts and culture organisations in Wales, illustrating the nature and scale of the venues

Source: Event, April 2018



# Supply: Visual and Applied Arts Ecology

## Networks and Partnerships

Visual arts partnerships within Wales take the form of skills and knowledge exchange, collections sharing and some co-curation. Yet there is wide recognition from the sector that these partnerships could be more strategic, more proactive, and potentially scaled and leveraged.

Sharing Treasures – Cyfoeth Cymru Gyfan, a scheme supporting the loan of Amgueddfa Cymru's collections, and latterly collections from other national organisations, to local museums across Wales, was closed after ten years despite an evaluation in 2010/11 emphasizing the considerable strengths of the network and clear recommendations for improvement. The programme received a budget of £110k in 2009-10 (increasing from £50k in previous years). According to the Sharing Treasures evaluation, the scheme provided skills development for museum professionals, offered the public more access to Amgueddfa Cymru's collections and other National collections and resulted in capital upgrades to local facilities.

The authors of the Evaluation recommended that the scheme be broadened to improve flexibility for partnering venues; to enable different levels of activity; and to ensure that upgraded facilities are used to meet the public's raised expectations following the initial

Sharing Treasures investment. Lack of capacity, including time, skills and space, was identified as a major barrier preventing venues and professionals from participating in the scheme, and Amgueddfa Cymru from nurturing more partnerships.

Celf Cymru Gyfan – ArtShare Wales, the Amgueddfa Cymru Visual Art Partnership, was piloted between 2004 and 2008 and was funded until through the pilot phase until 2010 by the Esmée Fairbairn Foundation. It delivered access to the national art collections. 19 projects were launched in 10 venues (including Bodelwyddan Castle, Glynn Vivian Art Gallery, Oriel Davies Gallery, Oriel Mostyn Gallery, Ruthin Craft Centre, Locws International, Brecknock Museum & Gallery, University of Glamorgan, Oriel y Parc Gallery, National Portrait Gallery (London) and over 400 art objects were loaned to a number of museums and galleries across Wales.

Many organisations are also active in networks external to Wales. By way of example, Artes Mundi, Oriel Mostyn and Glynn Vivian are members of the Plus Tate network, established in 2010 to share collections and expertise and build a network which would use Tate's resources to strengthen the contemporary visual arts ecology in the UK. The network has 35 cultural institutions in its membership. Oriel

Plas Glyn is a partner of the Ecomuseums (a 300-strong network, celebrating the identity of place and aiming to enhance the welfare and development of local communities) and Celtic Neighbours (a network working to stimulate cultural collaborations between minoritised-language communities).

The importance of these networks was highlighted by one Professor:

*"When times are hard, we either close off or reach out...reaching out and collaborating is a survival instinct."*



## Networks and Partnerships Implications and Opportunity

1. There is a requirement for more proactive, strategic partnerships and an appetite for joint-research, advocacy, joint-funding bids and exhibition exchange across the visual arts sector.
2. The recommendations from and benefits of Sharing Treasures outlined in the Review begin to address a number of issues regarding democratic access to the National Collection, upskilling the sector and provision of higher-quality infrastructure in Wales. Consideration should be given to how these recommendations could be advanced in the development of any new entity.



# Supply: Visual and Applied Arts Ecology

## National and International Profile

The visual arts sector has ambition to build its national and international profile, and to ensure there is healthy and ongoing dialogue across the nation's borders.

*"It is terribly important that artists are part of the world stage"* Museum Director

Such well-regarded platforms as Cymru yn Fenis Wales in Venice, Artes Mundi and the Lumen Prize for digital art actively seek to broker international dialogue and partnerships, and many visual arts organisations across Wales develop projects with international partners.

Yet the ambition to deliver international partnerships is tempered by limitations, including a lack of staff capacity and resource; insufficient exhibition space precluding organisations from being active participants on the international touring circuit, both importing and exporting; a lack of sector-wide advocacy or strategic relationships with the national press; and insufficient tourism materials, where the arts are not overtly covered in Welsh positioning.

Wales Arts International, the international arm of the Arts Council of Wales operates an International Opportunities Fund via strategic use of Lottery funding. In the

period 2015-18 the fund supported Wales based visual and applied artists in 75 collaborative projects in 32 different countries. Projects included visual arts and crafts and other artforms. Expenditure in respect of these projects over 2015 to 2018 was £182,345, which is an average of £2,430 per project.

In 2002 the Arts Council of Wales (ACW) agreed to fund a Welsh presence at the Venice Biennale of Arts for three cycles (i.e. six years to the end of the 52nd Venice Biennale in 2007), and to support a new major International Visual Arts Prize, Artes Mundi, for three prize cycles (2004-2008). Both well-regarded platforms, Cymru yn Fenis Wales in Venice and Artes Mundi, continue today to actively broker international dialogue and partnerships.

Cymru yn Fenis Wales in Venice projects, developed by Arts Council of Wales and the exhibition team (organisation(s) and/or individual(s)) selected to deliver the presentation, celebrate the best of emerging and established artists from Wales. They showcases Welsh artists at the Venice Biennale, the largest visual arts exhibition in the world, hosting approximately 500K visitors and 24,000 cultural professionals every other year. Wales in Venice is commissioned and managed through a partnership between

Arts Council of Wales and Wales Arts International, with support from the Welsh Government and British Council.

Since 2003 the level of investment in Cymru yn Fenis Wales in Venice has increased from £285,000 to a £375,000 core budget across the two year project.<sup>37</sup> Over the past fifteen years, Wales in Venice Artists have included Simon Pope, Laura Ford and Paul Granjon, Richard Deacon, Merlin James and Heather and Ivan Morrison, Cerith Wyn Evans, Bethan Huws, Paul Seawright, Helen Sear, Bedwyr Williams, Tim Davies and John Cale. Arts Council of Wales commissioned Arad Research to undertake evaluations of the programme in 2008 and 2015. The latter study, The value and impact of Wales' presence at the Venice Biennale for the visual arts sector in Wales (2015) demonstrates the positive impact of Wales in Venice on positioning Wales and Welsh Artists, providing experience and opportunities for galleries, curators and artists (and recently invigilators from Welsh universities). Some have emphasised that despite the importance of this programme, the reality is that some Welsh artists represented at the Biennale exhibited their work without having a dealer in place.

<sup>37</sup> The budget grew to £400,000 before being reduced back to its current £375,000 as Arts Council of Wales dealt with cuts.

The success of the Artes Mundi Prize, a biennale international exhibition in Cardiff founded in 2002 by Welsh artist William Wilkins with support from Arts Council of Wales, is demonstrated by the over 800 entries it attracted in 2016 from critically acclaimed artists across 90 countries. At £40,000 it is the largest art prize to an individual visual arts artist in the UK, with many interviewed emphasising the importance and high calibre of the prize, and its positive reflection on the ambition of Wales. Artes Mundi is notable for integrating fundraising expertise into the core team at its founding, but nonetheless today continues to face similar capacity challenges to its peers across Wales.

The Lumen Prize for Digital Art is an international award and tour that aims to raise the understanding, appreciation and enjoyment of digital art. Lumen Jury Panel member, Bruce Wands stated "The Lumen Prize continues to evolve and keep a finger on the pulse of new forms of digital art and creative self-expression." Prizes range in value from \$250 to \$3000 and since its launch in 2012, it has disbursed nearly \$45,000 in prize money, toured the world four times and staged over 30 shows, seminars and events, exposing people to the debate and the variety in digital work. In 2016 for its fifth edition it attracted over 700 entries from 45 different countries and

# Supply: Visual and Applied Arts Ecology

saw selected artworks tour venues across the globe, including venues in Brighton, London, New York, Shanghai, St Petersburg and Caerphilly. A number of Lumen Prize artists have had their work collected by museums; others have benefited from commission and exhibition opportunities through the Lumen partner network.

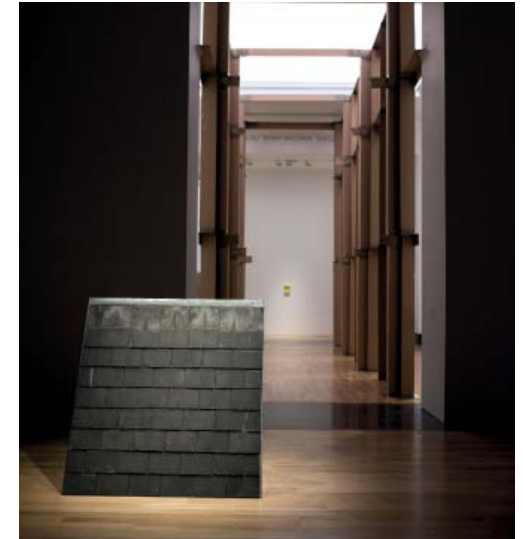
*"The reputation of Lumen gets noticed and opens doors that my work alone can't."*

**Ed Bateman, Lumen finalist, Still Image award (2014) & Moving Image award (2016)**<sup>38</sup>

A small but significant handful of visual arts galleries in Wales regularly foster unique connections with collaborators abroad. Chapter Arts Centre and Ffotogallery were each awarded the highly-competitive status of 'success story' by The European Commission in 2017 for "finalised projects that have distinguished themselves by their impact, contribution to policy-making, innovative results and/or creative approach and can be a source of inspiration for others". (33 projects were awarded this status from a pool of 738 projects, with two of the three UK projects awarded being located in Wales). Swansea-based Mission Gallery undertook a residency with Residency Unlimited in New York (2016), funded by Wales Arts International. In 2017 Wales Arts International established a

research partnership with Bangor University on behalf of Welsh Government to look into recent, current and future strategic initiatives between Wales and China; Pontio hosted a new Wales-China Festival in February 2018.

Despite these important programmes and initiatives, many interviewed felt there was still a requirement for a high profile, well-resourced Welsh institution working strategically to both broker international relationships and cement existing relationships across Wales. Some suggested the equivalent would be The Modern Institute in Glasgow, which works with 42 international and Scottish emerging and established artists to do just that. The Institute's recent international projects include partnerships with Sao Paulo, Beirut, Oslo and San Francisco) and the ongoing publication of monographs and exhibition catalogues. While a commercial model, its educational and partnership reach is central to its mission.



Carlos Bunga, Exodus (2014). Site specific installation at National Museum Cardiff. Image courtesy the artist. Credit: Warren Orchard

James Richards and Steve Reinke, What weakens the flesh is the flesh itself, video, 2017, linked to the Cymru yn Fenis/ Wales In Venice project. Source: Courtesy of the artist and Chapter; Photos Mark Blower

<sup>38</sup> <https://lumenprize.com/about/>

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## **National and International Profile Implications and Opportunity**

1. The visual arts sector has ambition to build its national and international profile, and to ensure there is healthy and ongoing dialogue across the nation's borders. In Artes Mundi, Cymru yn Fenis and The Lumen Prize, the Welsh visual arts sector has established three consistently, highly-visible international contemporary art programmes that attract positive attention and successfully position the nation within a crowded global cultural marketplace. These exhibitions - the success they garner abroad, and the stories they tell about contemporary art and society - should be shared widely with Welsh citizens.
2. In turn, other creative projects in Wales could benefit from the relationships and networks Artes Mundi, Cymru yn Fenis and The Lumen Prize have cultivated, enabling Wales to showcase the nation's work more widely overseas. The capacity - both in resource and infrastructure - to both export and import an international programme of existing contemporary art initiatives, drawing on strengths from across the sector, is notably lacking.

*"There are lots of missed opportunities where people come to Wales and we can't bring them back. We want to nurture those relationships."* **International Curator**

3. The unrealised recommendations published in the 2015 evaluation of the Venice Biennale remain as relevant today as then:
  - Develop an improved touring infrastructure to bring back the work to Wales and delivering a strategy to tour the work at a wider UK and international level;
  - Further invest in the visual arts infrastructure in Wales (is required) to maintain the profile and momentum of the sector and further capitalise on the impact delivered. The visual arts sector has ambition to build and leverage its national and international profile, and to ensure there is healthy and ongoing dialogue across the nation's borders.

# Supply: Visual and Applied Arts Ecology

## Artists Professional Cycle

### Art Schools

*"The speed of the growth of the creative industries...depends upon an environment that encourages innovation and rewards enterprise...there is a vital need to ensure a pipeline of creative talent and original ideas for economic as well as cultural growth..."*<sup>39</sup>

While the creative industries in Wales are fast growing, they *"depend on... art schools to supply them with the fresh talent that will keep them in their position as global pioneers."*<sup>40</sup> However the introduction of funding cuts and university fees has had an adverse effect on attracting talent. As one Welsh university lecturer stated:

*"We are getting a much less international and diverse cohort since fees have been introduced. Before [fee introduction] we got international students from everywhere; now, the students are mostly from the Swansea region and South Wales. This has changed the atmosphere."*

2017	Institute
1	UCL
2	Newcastle
3	Oxford
4	Oxford Brookes
5	Leeds
6	Goldsmiths
7	Kingston
8	Nottingham Trent
9	Northampton
10	Aberystwyth
22	Wrexham Glyndwr University
23	Manchester Metropolitan
58	Cardiff Met
63	South Wales

Figure 6: Art & Design Universities – Top 65 UK Rankings

Source: University Guide: League Table for Art (the study of and training in drawing, sculpture, printmaking and other media), Guardian, 2018

2017	2016	Global Rankings	Location
1	1	Royal College of Art	UK
2	2	Massachusetts Institute of Technology (MIT)	USA
3	4	Parsons The New School for Design	USA
4	3	Rhode Island School of Design (RISD)	USA
5	6	Pratt Institute	USA
6	5	University of the Arts London	UK
7	10	Politecnico di Milano	Italy
7	7	School of the Art Institute of Chicago (SAIC)	USA
8	12	California Institute of the Arts	USA
10	8	Stanford University	USA
11	15	University of Oxford	UK
15	11	Goldsmiths, University of London	UK
19	20	Glasgow School of Art (GSA)	UK
36	38	Loughborough University	UK
49	44	Ravensbourne College of Design and Communication	UK

Figure 7: Top 50 Global Rankings

Source: QS World University Rankings

<sup>39</sup> Creative Industries Federation and Arts Council England, How public investment in arts contributes to growth in the creative industries (2015)

<sup>40</sup> <https://www.theguardian.com/culture-professionals-network/culture-professionals-blog/2014/may/12/creative-industries-education-mcqueen-ive-emin>



# Supply: Visual and Applied Arts Ecology

Welsh art schools and universities are not currently ranked in the top 50 art and design schools globally, or in the top ten in the UK (Figure 6 and 7) and in recent years, the axing of Newport's fine art degree, for example, has led to the loss of expertise in the field.

*"[The visual arts sectors' relationships with university] is an area that needs focus. Cardiff University is renowned for research but not in visual culture. Places like Newport [that did] research in documentaries, film and photography closed down. We've lost something as a result." Artist*

That said, there have been some recent triumphs. In the 2018 Guardian University Guide, Aberystwyth has climbed 41 places to 10th in art subjects and Cardiff Met has risen from 36th in 2017 to 15th in Design and Crafts subjects.<sup>41</sup> The opening of the £5m Centre for Creative Industries at Glyndwr University in 2011 caters for several hundreds of students annually and provides a stimulus to the development of private and spin-out businesses associated with the creative industries.<sup>42</sup>

Our research has confirmed that there are pockets of innovation and excellence, with some universities developing cross-

disciplinary networks through research projects between lecturers, students and arts organisations – which of course may not be reflected in rankings. For example MOSTYN and the School of Creative Arts Research Centre at Wrexham Glyndwr University co-funded a PhD on digital media and museum and engagement, which aims to identify ways in which digital technology transcends conventional structures of programming, display and engagement.<sup>43</sup>

There are also a number of successful, practising Welsh artists working as Lecturers within the Welsh Art Schools, including Wales Venice Biennale 2011 artist, Tim Davies, who is currently Professor at Swansea College of Art, alongside cross-media artist, Holly Davey and Professor Sue Williams. Performance artist and painter Professor Andre Stitt and cross-media artist and current artist in residence at St Fagan's, Sean Edwards teach at Cardiff School of Art and Design and ran the Warp programme at G39 (2008). Sean Edwards is representing Cymru yn Fenis / Wales to incorporate NT's point about For reasons given above, I would say that there are in Venice at the 58th International Art Exhibition, the Venice Biennale in 2019.

## Emerging Artists

Qualitative research and consultation suggests that artists graduating into and/or beginning their career in the art scene are well supported by the existing Welsh visual arts infrastructure. The vast majority of Welsh artists consulted agreed that there is "significant gallery support for emerging artists" and that "directors and curators are good and accessible." Many stated that they could access opportunities from bodies such as Arts Council of Wales to fund projects, through programmes such as Creative Wales Awards and Creative Wales Fellowships, in which approximately 15 artists (writers, musicians and visual and applied artists) are given funds, space and time to creatively experiment and research to inform their future practice. 2016/17 beneficiaries included artists such as ceramic artist Adam Buick, photographer and video artist Richard Billingham, cross-media artists Holly Davey, Jeanette Orrell and Rhian Hâf.

Arts organisations also offer strong support to emerging artistic talent. For example, Ruthin is an advocate of Creative Wales makers and facilitating the international dimensions of Creative Wales Ambassadors. G39's Wales Artist Resource Programme (WARP) supports artists developing careers and encouraging them to experiment and translate this into exhibition programmes. This includes

Cardiff-based artist Kelly Best whose work is attracting interest and attention as a result of her show, *Sunder* at g39:

*[talking of developing works with Mark Houghton] "g39 in Cardiff gave us our first opportunity to work together during their Unit(e) season. We spent the two months working in a very free and experimental environment, with both the encouragement and critical voice of the other artist, as well as from the people at g39"*<sup>44</sup>

Glynn Vivian dedicated one of its galleries to the Swansea Open 2017, an annual exhibition open to artists and makers who live and work in the City and County of Swansea. This exhibition showcases a wide variety of works across a broad range of mediums including painting, drawing, sculpture, photography, printmaking and film.

In its exhibition *Portal* 2016, Llantarnam Grange Arts Centre featured the work of the year's top UK graduates in the applied arts. The curatorial team travelled the UK to select the best of that year's graduates, searching for those who were pushing the boundaries while maintaining and developing the traditions of their craft. The *One Year On* section of the exhibition also brought back a number of the previous year's graduates to show how their work

41 <https://www.theguardian.com/education/ng-interactive/2017/may/16/university-league-tables-2018>

42 Fourth Street: Experts in Place, Business Plan for OW, Wrexham County Borough Council (Nov 2015)

43 <https://www.mostyn.org/news/post-graduate-opportunity-digital-curator-media-and-content>

44 <http://youngartistsinconversation.co.uk/Kelly-Best>

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has evolved since they finished their degree courses.

## Mid-career Artists

Qualitative evidence suggests that many emerging artists subsequently leave Wales by the time they have reached their mid-career, most commonly relocating to larger urban areas such as London and Bristol, where there are more opportunities for exhibitions, gallery representation and visibility. Once artists have moved away from Wales, many cultural professionals interviewed suggested it was hard to entice them back.

*“The orthodoxy is to support emerging artists, actually very few pay attention to mid and late career.” Artist*

While the overall visual arts and applied arts ecology is diverse, mid-career artists felt that they had exhausted the opportunities presented by venues in Wales relatively quickly.

*“In Cardiff and Wales it is hard to find spaces to populate. Other cities have many more ‘iconic’ galleries. Cardiff and Wales are lacking. From an artist’s point of view, once you’ve shown in one you’ve done it.”*

**Mid-career Artist**

*“Artists have shown in almost all the galleries in Wales... becomes too narrow.”*  
**Established Artist**

This is exacerbated from lack of sufficient funding:

*“The exhibition and production budgets in Wales are relatively small, Welsh artists tend to have to work outside of Wales to make major new works. There is simply not enough funding to commission major new work from public funds outside of initiatives such as Wales in Venice.”* **Visual Arts Curator**

Despite this exodus and the funding constraints, the national institutions aim to support artists at this stage in their career. This support is further demonstrated on a national level where more established Welsh artists and makers are actively collected by the national institutions, Amgueddfa Cymru and National Library Wales. For example, National Museum Cardiff’s exhibition, *Fragile?* (2015) showcased commissions (by The Derek Williams Trust), and associated films showing the making process, from four Welsh artists, Adam Buick, Claire Curneen, Lowri Davies and Walter Keeler, alongside ceramics from the national collections and loans from artists and institutions including the V&A. As part of the show Amgueddfa Cymru commissioned major new work by Keith Harrison and Phoebe Cummings

supported by Colwinston Charitable Trust.

## Established Artists

A number of the most commercially successful artists born, living or working in Wales are represented by galleries outside of Wales or have shifted their practice beyond the borders. To name but a few, Swansea-born artist, Dan Rees is represented by Tanya Leighton Gallery in Berlin, where he relocated before recently moving to London; the work of Cardiff-born Laura Ford, based in London, is represented in collections around the world including those held by Tate, V&A and MoMA as well as exhibited in a wide range of Welsh venues; and interdisciplinary German-Welsh couple Manon Awst and Benjamin Walther have lived and worked in Berlin and Wales.

*“Artists have continued to move to Berlin because there is a creative vibe, spurred on by cheap studios and independent galleries. There are opportunities there. Collectors aren’t based there, but they see a creative energy and come from elsewhere in the world.”* **Contemporary Art Auctioneer**

Event’s consultation with artists and arts organisations has shown that only a small number of high-profile established artists stay or return to Wales, including Bedwyr Williams and Kevin Sinnott. Following his art course at Kingston School of Art

English-born David Nash settled in Wales (Blaenau Ffestiniog) in 1967 where his studio remains to this day. He is represented by Annely Juda Fine Art, a London-based gallery.

Some of the more established artists consulted stated that they elected to return to Wales in part in order to raise the profile of Welsh artists outside of Wales.

*“Artists in Wales have more exposure than they used to 15 years ago.”* **Established Artist**

Some interviewees suggested that on returning to Wales, visibility as an artist substantially reduced, and that they were struggling to reach the number of studio visits, from dealers and collectors, that they would expect.

*“I made a point of moving back to Wales. But I have had a handful of studio visits in the last year; in London I would be getting substantially more in a month.”* **Established Artist**

*“Glasgow has a great art school and around it young galleries developed to promote artists, who then got picked up further afield.”* **Arts Leader**

*“How can Wales attract international artists and creatives if the best artists are leaving?”*  
**Gallery Director**

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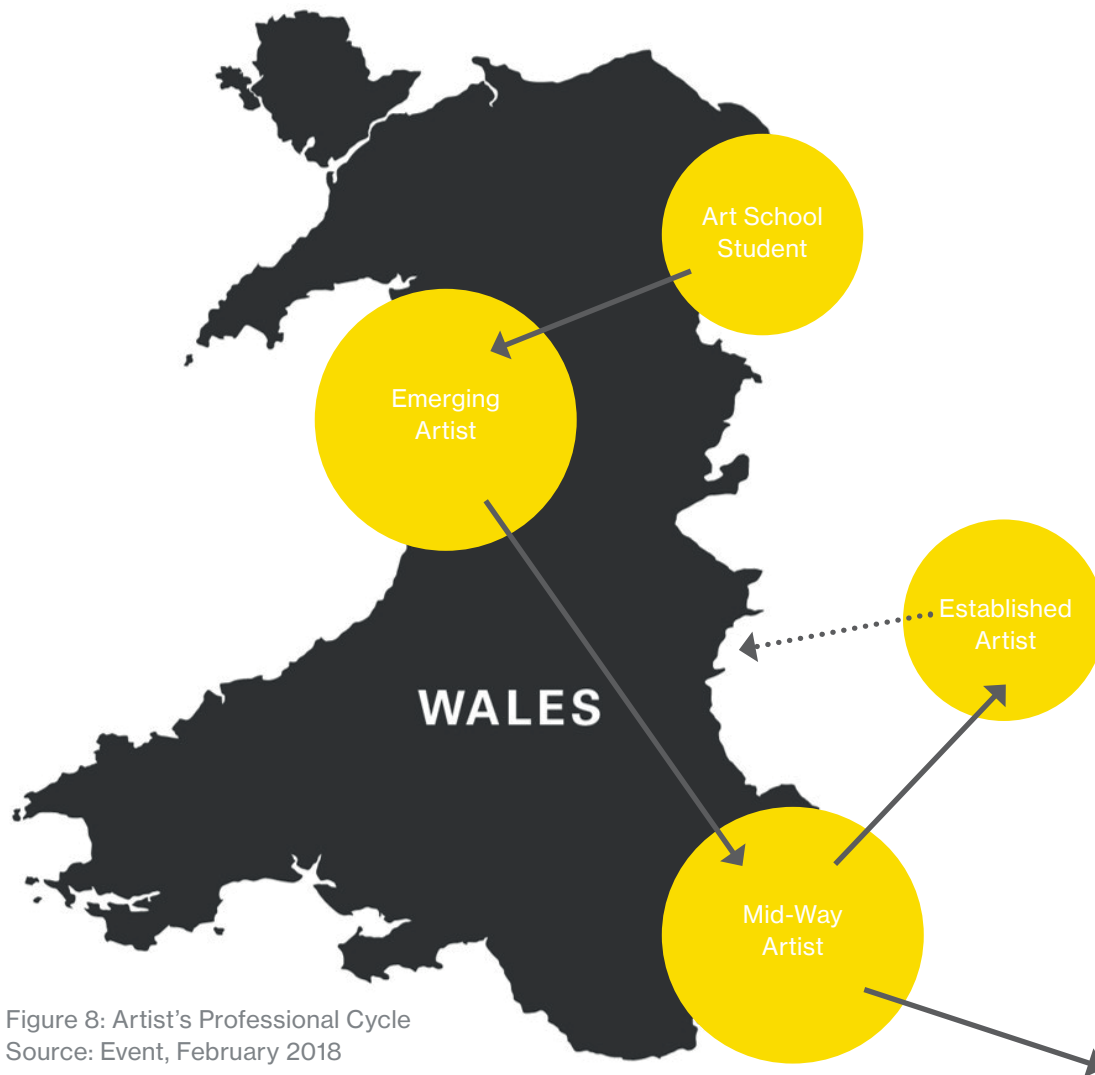


Figure 8: Artist's Professional Cycle  
Source: Event, February 2018



Swansea Open 2017: Glynn Vivian Gallery, Swansea  
Shani Rhys James, *This Inconstant State*,  
Connaught Brown exhibition, London  
Source: Event, April 2018

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## Artists Professional Cycle Implications and Opportunity

1. To spark, nurture, retain and attract new creative talent to Wales, the artists' professional cycle needs to be both better understood and resourced at each key stage of an artist's career. Any new national contemporary art gallery should strengthen the talent pipeline for Welsh professional artists. This would be best achieved by the new national gallery being co-developed with art schools, universities and artist networks.<sup>45</sup>
2. Contemporary artists across their professional careers – emerging, mid and established – would welcome more and varied spaces in which to develop and showcase their work. For some artists, new platforms enabling them to share their creative process would be a compelling opportunity.
3. Providing more spaces and opportunities – in existing venues, non-traditional venues and the landscape – may help to retain 'home-grown' mid-career and established Welsh artists.
4. Opportunities to nurture creativity in the 'non-artist', using contemporary art as a muse, vehicle for discussion, or starting point could be explored.

<sup>45</sup> The benefits of linking this both physically and intellectually with any new entity is well-documented. Most recently, this has been seen in the redevelopment of Kings Cross Granary Square in which St Martin's College campus is situated: "The importance of the art school cannot be overstated. To have young, interested students wandering through the site every day can only be a good thing..." (Nathan Brooker) This does not necessarily mean the new entity should be part of an existing university campus in the same way as, for example, The Science Gallery, Trinity College, Dublin, which hosts a programme of exhibitions, workshops, events and talks with a view to science outreach and art-science collaborations. But some artists emphasised that the contemporary art gallery "needs to be built around places with young students and universities and cultural needs..." to ensure it continues to invest in emerging talent.



Contemporary sculptor, Nick Elphick,  
Mostyn  
Source: Event, January, 2018



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## Content and Collections

*"We certainly want a place which could be full of excitement in showing contemporary and modern art. Everybody who wants that wants to see how it fits in with the existing scene, with existing galleries which are offering strong things. And we want to be clear about exactly how existing collections relate to the showing of new work. So the main question, I think, is whether this gallery is about showing temporary exhibitions with new focus, new work and also an international reach. Or whether it also includes the collection of modern and contemporary art that's already built up"*<sup>46</sup>  
**Phil George, Arts Council of Wales**

The national art collection, cared for by the Amgueddfa Cymru, comprises 46,526 works. This comprises 11,614 applied artworks; 32,300 works on paper (watercolours, drawings, prints, sketchbooks and albums); 1,924 oil paintings; 641 sculpture; 47 new media including film and video. Approximately 60% is modern and contemporary art works (1900 – present day).<sup>47</sup>

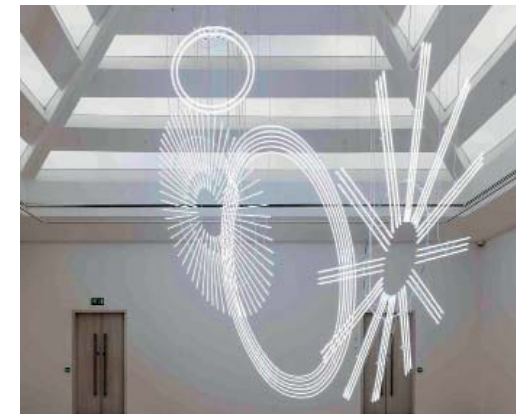
The Derek Williams Trust has been a dedicated and eminent patron to Amgueddfa Cymru and continues to work closely with the Museum to collect post-19th Century fine and applied art. The Trust supports the museum in its purchases and purchases art for its own collection. The latter are curated by Amgueddfa Cymru and includes approximately 260 works loaned to the Amgueddfa Cymru, including artists such as David Jones, Henry Moore, Lucian Freud, George Shaw, Howard Hodgkin and Anthony Caro.

Over recent years, Amgueddfa Cymru has focused its attention on developing its contemporary art and craft collections, with the aim of incorporating a wider body of works including film, performance, photographic, mixed media artworks. And now approximately 25% of the national art collections is by living artists. Most recently, through the support of the Contemporary Art Society in London, it has acquired a large-scale neon sculpture by internationally acclaimed Welsh artist, Cerith Wyn Evans.

*"The fact that his work was not represented in the Wales' national collection has been a huge gap that the Museum has been anxious to fill for many years. The Great Works award has given us a unique opportunity to acquire a major work by Cerith that has been specifically developed for the spaces of the Museum... [it's] a stunning addition to the collection."*<sup>48</sup>  
**Nicholas Thornton, Head of Fine Art, Amgueddfa Cymru**

Equal emphasis is put on the development of a varied and vibrant contemporary crafts collection, which includes works by self-taught Welsh potter Phil Rogers and Welsh minimalist Beverley Bell-Hughes. More recently, the Contemporary Art Society acquired selected pieces by Simon Carroll (1964-2009) for Amgueddfa Cymru.

The National Library Wales' also boasts an impressive modern and contemporary collection, which includes 950,000 photos (800,000 connected to Wales) and 60,000 works of art (including 4000 framed items, 8,000 mounted items and over 500 Drawing Volumes). The contemporary collection includes works by well-known artists such as Augustus John, Gwen John, David Jones, Evan Walters, John Elwyn, Brenda Chamberlain, John Piper, Claudia Williams, Gwilym Prichard. Alongside, this



*Who Decides?* Open Store, National Museum Cardiff  
Source: Event, February 2018  
*Cerith Wyn Evans, Radiant fold (...the Illuminating Gas),* National Museum Cardiff  
Source: Event, April 2018

<sup>46</sup> <http://www.bbc.co.uk/news/uk-wales-39352607>

<sup>47</sup> This bias is reflective of the visual arts in Wales and the age of the institution – Amgueddfa Cymru was established in 1907 – so there is not a large number of Victorian or Old Master paintings compared to other large collections, such as Walker Art Gallery, Manchester Art Gallery, Whitworth and Birmingham City Museum and Art Gallery.

<sup>48</sup> <http://www.contemporaryartsociety.org/news/cas-news/major-new-installation-cerith-wyn-evans-unveiled-cardiff/>

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there is a wealth of content in the digital archive including 150,000 hours of sound and 7,000,000ft of film and 250,000 hours of video.

Together these two national collections provide a sound base from which any new national contemporary art gallery can draw. However, only Amgueddfa Cymru has a remit to represent the full diversity of contemporary artistic practice in Wales (including installation and video art) and are the only institution with a remit to collect international art. A number of consultees emphasised that many of these collections are not seen by the vast majority of people in Wales, either because they are held in the stores due to lack of exhibition space (as previously discussed) or because they are not shown widely around the country.

The Amgueddfa Cymru Outreach Art Collection – comprising over 500 paintings, drawings and prints – enabled school children in Wales to access museum objects regardless of where they lived. However this was suspended in 2011 and the Collection is no longer available on loan.

## Development of a Contemporary Collection

Building and preserving a collection is typically a critical and defining part of a national art gallery's remit. The importance of this function, to collect and preserve the finest examples of a nation's recent and living creative output, was echoed in the Local Museum Provision Wales (2015) report, which called for the establishment of a new organisation, Collection Wales:

*“Welsh Government should put measures in place to establish Collection Wales, which will rationalise develop and safeguard collections of significance to the histories and cultures of Wales.”*

However, perhaps surprisingly, many interviewed for this study did not view collecting as a priority for any new national contemporary art gallery. The arguments against creating a collection ranged from a practical stance about the opportunity costs (i.e. the high cost of collecting over exhibiting, or collecting over creating vibrant, social-engaged programmes) to the more philosophical and conceptual (contemporary art should be live, and of the here and now).

Many visual arts organisations in Wales are forced to grapple with this 'either/or' decision on a regular basis. Current capacity challenges, including lack of time,

money, resource and expertise, means that organisations have to prioritise and invest in programmes or build their collections - not both. The benefits of focusing on inclusive programming were characterised as a worthwhile investment that builds audiences, and positively, and relatively immediately, impacts on living artists' careers and on their communities.

One cultural specialist explained how tight the collecting budgets are today:

*“before austerity hit there was a substantial purchasing budget... at other venues, none of them have big budgets... Newport Museum, Glynn Vivian [Art Gallery] used to have a lot going on... A purchase award was set up for Glynn Vivian to support annual purchases... around £1,500.”*

Yet most interviewed recognised both the longer-term risk in not collecting and the 'halo' benefits enjoyed by those institutions that do collect. A permanent collection can lead to “currency with other museums through loans and exchange agreement” **Contemporary Art Auctioneer**; a more sustainable institution over the long term; and a legacy from this period in art:

*“There is a danger that if anyone comes along in 50 years' time, there will be nothing there, or very little. Collecting is essential.”* **Independent Curator**

Many interviewed also argued that there needs to be more opportunities for commissioning [new works], emphasising the reactionary nature of acquiring art that already exists. Commissioning would enable the sector to support the artists born, working and living in Wales, as well as integrate the work of international artists into a current, live dialogue for, about and with the nation and its connections to other nations.

*“Excellence in contemporary art, reflect Welshness and Welsh aspirations, be forward looking. It should not just be about existing collections dotted around Wales, but about commissioning new works and exploring dynamic approaches to art. Rooted in artistic contemporary excellence. It should have international standards.”*

*“A by-product of working with contemporary artists is the opportunity to secure new acquisitions. Can it be worked into an arrangement with the artist?”* **Gallery Director**

Finally, most argued that the relationship between the nation's own permanent collection and frequently changing temporary exhibitions positions Wales effectively in the market to both receive and provide international touring exhibitions. In turn and over time, this develops

# Supply: Visual and Applied Arts Ecology

contemporary art audiences and provides a legacy for future generations.

*"A new space should have a contemporary collection – collecting spaces and changing exhibitions. We need that in order to have a platform or stage for international contemporary art to come to Wales, so that it helps to exchange exhibitions to other places. At the moment this is piecemeal, organised by artists groups."*

**Artist**

## Interpretation of Collections

An overwhelming majority interviewed stated that Wales suffers from *"a lot of preconceived ideas with regards to art. It assumes 19th Century disciplines."* **Arts Leader**

Many argued that contemporary practice was shifting away from the established approach of defined art forms, and instead moving toward embracing mixed media, and in some cases, seemingly uncollectable-artworks.

*"Contemporary art blurs boundaries. It naturally crosses disciplines. It is not split into film, performance, sculpture – it can be all of them."* **Gallery Director**

Qualitative research highlighted the desire for Welsh art and artists to be shown in a broader context – within the canon of art

history and society, and within a global picture, highlighting the nation's culture and identity in relation to others.

*"I want to see my art in a continuum."* **Artist**

*"There is strength in depth. We should exploit the strength of the [National] Museum's modern and contemporary art. Dialogue is important... the depth and richness of dialogue is much more educational and cultural if you have both."*

**Arts Leader**

David Anderson, Director General of Amgueddfa Cymru, said:

*"There is an appetite from our visitors to experience work by artists living and working in Wales today, and by Welsh artists who work outside Wales."*

*"We need to think about fusion of cultures rather than hegemonic culture."* **Artist**

*"We shouldn't focus on the binary – either this or that (Welsh artists or international, local or international)"* **Gallery Director**

Consultees highlighted that the National Contemporary Art Gallery Wales was well positioned to explore wider national and international trends, issues and challenges in and through contemporary art practice.

*"What Wales doesn't need is an echo-chamber for the Welsh – Welsh artists created Welsh art for Welsh artists..."*

**Curator**



Collection storage, Glynn Vivian Gallery, Swansea

Source: Event, 2017

# Supply: Visual and Applied Arts Ecology



## Content and Collections Implications and Opportunity

1. For any new 'gallery' there is a desire for both permanent and temporary art exhibitions to:
  - showcase the breadth and variety of living artists works;
  - enable access to and display of the modern visual and applied arts collections (post-1900s) so that a variety of narratives can be developed to frame, support and explore contemporary art in a longer continuum;
  - include Welsh, UK and international artists and crafts people's work and encourage dialogue between them.
2. There is a requirement to provide greater and more democratic access to the two Welsh national collections for the diverse audiences across Wales and ensure collections currently in stores can be viewed more readily. The contemporary art collections are of and for the people of Wales.
3. The national collection can be further developed through a more ambitious commissioning programme. Such a programme would result in a collection that is characteristic of Wales alone, capturing a distinctive moment in the nation's art and history.
4. Collecting the best of contemporary art and design ensures Welsh contemporary life and creativity is preserved for future generations.



Peter Finnemore, Signalman, 2004

Source: Peter Finnemore

Laura Ford, Scheffel exhibition

Source: Laura Ford

James Richards, Not Blacking Out, Just Turning The Lights Off, 2011-2012

Source: Courtesy the artist and Chapter;  
Photos Mark Blower



# Demand: Audiences

**“But how, then, are the great masses to be given access to their cultural inheritance? A few, but only a few, can travel about the world visiting all the museums making their pilgrimages to the sanctuaries. Only a few museums, here and there, can have collections, which are remotely representative even of the elements of the great cultural traditions.”**

**Walter Lippman ‘The Museum of the Future’, Atlantic Monthly, 1948**

*“It is extremely important that contemporary art from Wales and from around the world - both popular and unfamiliar - is shown in fresh ways to as many people as possible.”<sup>49</sup>*

**David Anderson, Director-General, Amgueddfa Cymru**

The timescale and scope for this Study has not permitted primary market research or public consultation to be undertaken. Findings and recommendations with regards to audiences and behaviour are based on secondary research, consultations with arts and cultural organisations with direct knowledge of their audiences, and our experience in the arts and culture sector.

The following sections provide a summary of what is known about the current visual and applied arts audiences in Wales and any gaps in this material. More detail of the identified key markets – resident market, UK day, UK stay and international tourists

– and the total market sizes and characteristics are included in the Appendix 5. Main sources include Visit Wales’ Wales Visitor Survey 2016 Report and official statistics collated by Welsh Government.

## **Existing Visual and Applied Arts Audiences**

Our consultations have shown that there is a shared view among the arts and culture sector that since the opening of the West Wing and establishment of Artes Mundi, an audience for contemporary art has developed and remains stable.<sup>50</sup>

*“Artes Mundi has helped to develop a contemporary art audience with no capital expenditure... The audience has been developed considerably.”* **Arts Leader**

This is echoed in the available data. According to the Visitor Profile Survey 2015-2016, visitation across the seven Amgueddfa Cymru sites has remained level

over 10 years, with an average of 1.6m visits per annum. With the opening of the West Wing (housing the contemporary art collection and temporary contemporary art exhibitions), National Museum Cardiff experienced a bump in visitation in 2011/12. The National Museum Cardiff has experienced a five-year average of 471,744 visitors per year, with 2015-16 and 2016-17 seeing visitors grow to 490K. During 2015-2016, 57% of visits to the National Museum Cardiff were repeat visits, with visitors coming 4.4 times a year.<sup>51</sup>

Amgueddfa Cymru’s data stresses that of the total visitors to the National Museum Cardiff, 19% thought the art, paintings, galleries were the most inspiring part of their visit (as compared to 21% finding the animals/dinosaurs to be so).<sup>52</sup> The reported daily visitation to the existing National Gallery’s contemporary art galleries is in the region of 450-550 visits per day, a large percentage of these daily visitors are

attending their temporary contemporary art exhibitions (Figure 9).

Data from 2015-16 finds that visitors to Amgueddfa Cymru sites have become ‘more upmarket’ since 2012-13, with three times as many Welsh visitors in the affluent demographic (AB) than DE. This is in inverse proportion to the population of Wales. Non-white visitors are under-represented at the National Museum Cardiff, in comparison with ethnic profile of local population. The current analysis would benefit from data collection establishing crossover visits to other parts of the museum; audience’s motivations for visiting; the extent of repeat visitation to the art galleries in contrast to first time visits (and the differences in experience, if any); and a population survey to better understand barriers to access.

Across the visual arts sector, there is minimal information showing cross-venue trends and patterns in audience behaviour. While Amgueddfa Cymru data shows that

49 Huw Thomas, National modern art gallery planned for Wales, BBC (23 March 2017)

50 Amgueddfa Cymru – National Museum Wales

51 Amgueddfa Cymru – National Museum Wales Visitor Profile Survey 2015-2016

52 Ibid

# Demand: Audiences

2015-16 visitors have visited other heritage sites in Wales – with the highest level of cross-over with the National Trust and Cadw (Welsh Government’s historic environment service) there is no data available about cross-over visitation between visual arts organisations.

There has been no consistent pattern to visit numbers at arts organisations across Wales over the past five years. Where there has been a decline in visitation to individual venues this can be explained in some cases by closure during refurbishment or construction, for example Glynn Vivian Gallery and Ty Pawb, and by the introduction of admissions charging at Cyfarthfa Castle. Additionally, Artes Mundi’s variance in number of visitors is largely due to the scale of the exhibitions. For example in 2016/17 the exhibition was at two venues, where as in 2014.15 it was located across three.

While there are some gaps in the available data at each of the arts venues across Wales, there are some clear examples of increasing number of visits at key sites including Oriel Plas Glyn-Y-Weddw (XXX in 2012/13 to XXX in 2016/17), Mostyn (XXX in 2012/13 to 73,756 in 2016/17), Ffotogallery (43,820 in 2012/13 to 97,893 in 2016/17), and Peak (119,024 in 2012/13 to 253,240 in 2016/17) (Figure 10).

Name	Location	Open	Close	Museum Visits - all years	Exhibition visits - all years	Total Days Open	Avg/Day	% Conversion
Artes Mundi 7	g19-21	21/10/2016	26/02/2017	159,571	41,521	107	388	26%
Bacon to Doig	g14	18/02/2017	31/01/2018	536,703	111,976	328	341	21%
Swaps	g18	30/09/2017	15/04/2018	252,153	49,757	168	296	20%
Who Decides?	UWW	28/10/2017	02/09/2018	292,666	77,343	215	360	26%

Figure 9: Number of Visits to Contemporary Art Galleries at the National Museum Cardiff 2016-2018

Source: Amgueddfa Cymru, July 2018

Figure 10: Number of Visits per Annum 2012-2017 (Please note this is a non-exhaustive sample and includes approximate figures only.)  
Source: Event, April 2018

## Demand: Audiences

Arts Organisation	Number of Visits				
	2012/13	2013/14	2014/15	2015/16	2016/17
Aberystwyth Arts Centre	Gallery 230,921 Total 854,978	Gallery 165,303 Total 706,181	Gallery Unavailable Total 692,382	Gallery 123,538 Total 650, 531	Gallery 123,135 Total 666,934
Artes Mundi (multiple venues)	65,000	N/A	89,000	N/A	73,000
Chapter Arts Centre	Total 794,868	Total 794,104	Total 798,216	Total 801,255	Total 808,493
Eisteddfod	153,704	143,502	150,776	140,297	147,498
Ffotogallery	43,820	101,975	72,026	106,802	97,893
G39	3,204	3,179	6,706	4,274	4,754
Glynn Vivian	45,588	19,986	58,397	28,720	29,482
Llantarnam Grange Arts Centre	57,133	63,546	68,830	73,926	65,716
Mission	12,566	\	\	\	\
MOMA Machynlleth	\	19,619	21,354	\	\
MOSTYN	75,533	74,704	79,064	77,263	73,756
National Library Wales - Galleries	77,500	84,530	79,545	86,406	75,208
Newport Museum and Art Gallery	59,399	51,084	34,582	28,259	293,73
National Museum Cardiff	477,399	448,288	446,635	491,880	494,518
Oriel Davies	66,050 (+offsite Tv Unnos project 10,538)	71,194 (+Helen Sear tour 21,117)	75,072	72,189	67,481 (+ 31,661 touring exhibitions)
Oriel Myrddin	\	22,839	19,910	25,000	\
Oriel Plas Glyn-Y-Weddwr	\	\	\	\	+100,000
Oriel Ynes Mon	\	\	\	\	\
Pontardawe Arts Centre	\	\	\	Over 60,000	
Ruthin Craft Centre		77,747	75,419	67,352	67,838
Ty Pawb (Oriel Wrecsam)	\	\	\	\	\

# Demand: Audiences

The Arts Portfolio Wales Organisations Survey (April 2016 - March 2017)<sup>53</sup> shows that across the 67 portfolio sites (and includes exhibitions, film screenings, performances by touring companies and performances at presenting venues) the highest levels of attendances were made to exhibitions of visual arts and crafts, receiving 1,761,625 attendances. This is not an insignificant figure given that the population of Wales is in the region of 3.1m.<sup>54</sup>

Visual arts and crafts remain the most popular participatory art form with a quarter (25.4%) of adults in Wales taking part at least yearly.<sup>55</sup> This art form experienced the greatest increase compared with 2015, (up by 0.8 percentage points).<sup>56</sup> 64,058 participatory arts sessions were delivered, with 1,103,436 attendances made to these workshops.<sup>57</sup> Of the total participatory art sessions delivered, 37,953 were specifically for children and young people, while 26,105 were delivered as general participatory sessions.<sup>58</sup> Of these 7,543 were specifically

targeted at people in the Protected Characteristics groups.<sup>59</sup>

*"We track visitor numbers with door counters, however, this isn't as accurate as it could be. We aren't using a digital system and we don't know why people have come."*  
Gallery Director

Arts Council of Wales found that *"adults aged 16-24 and 25-34 are more likely than any other age groups to attend an arts event at least once a year."*<sup>60</sup> In contrast, Amgueddfa Cymru's 2015-16 analysis shows that young people (16-24s) are under-represented among individual visitors, accompanied by a decline in proportion of families with children visiting all museums. Amgueddfa Cymru has used this data to rework the Gallery's education programme, including through the recruitment of a creative team to revamp the Young Curators Forum and wider programming, the schedule upcoming survey (2018-19) may demonstrate a positive shift in these figures.

Other than the data collected by Arts Council of Wales there is very little

available, with the exception of the Audience Agency's research (Welsh postcode data) from 2012 that shows that at that time 18% of the population visited an art gallery once a year, with only 1% visiting an art gallery at least once a month. As a proportion of the Wales population it is relatively evenly spread across all the regions (Figure 11).

Region	Visited an art gallery once (Adults 15+)	Visited an art gallery at least once a month
Wales South East	16%	1%
Wales North	18%	1%
Wales South Central	18.8%	1.1%
South West	18%	1%

Figure 11: Percentage of people within the Welsh regions who have visited an art gallery

Source: Audience Agency (2012)

53 The Arts Portfolio Wales Organisations Survey (April-Sept 2016/17 and Oct-March 2017)

54 Office for National Statistics

55 The question asks: "About how often these days, if at all, do you take part yourself in your leisure time in visual arts and crafts, for example painting, sketching, computer graphics, pottery, wood-turning, jewellery making, weaving, textiles, knitting or sewing."

56 The Arts Portfolio Wales Organisations Survey (April- Sept 2016/17 and Oct-March 2017)

57 Ibid

58 Ibid

59 Protected Characteristics as defined by the Equality Act 2010, include disabled people, people from a BME background, children and young people, lesbian, gay or bisexual people, pregnant women and new mothers, people with specific religious beliefs and transgender people. The groups are not mutually exclusive and therefore people can be included in more than one group.

60 Arts Council, 2016b: 5



# Demand: Audiences

It is not possible to state with confidence that these figures collectively demonstrate a demand or a lack of demand for contemporary art. The visual arts sector as a whole does not fully understand its existing or potential markets. Consultations and secondary research for this study have shown that:

- Barriers to accessing contemporary art in Wales have not been qualified or quantified in existing research, including lack of marketing and joined-up marketing between venues geographical access, feeling that the visual arts are elitist,<sup>61</sup> increased competition for leisure time and admissions charging;
- There is no publicly available data on the cross-over within or between sites or repeat visitors. There is little to no information about how much audiences overlap between visual arts venues and how their attendance compares to other leisure activities, including those activities outside of the arts (e.g. gaming; Netflix);
- There is no comparison of figures to the population size (i.e. penetration rates) or comparison to peer arts councils in the UK;
- Tourism research by Welsh Government and Visit Wales is comprehensive and in line with the wider UK's data. However,

there is little data associated with cultural (visual and applied arts) tourism;

- Tourism materials do not currently promote contemporary art and this is likely to have an impact on visit numbers and visitor types.

During the course of this study, Arts Council of Wales, in conversation with Visual Arts Galleries Wales (VAGW), asserted that there are inconsistencies in the audience data and has questioned how well organisations understand their audiences. Currently, Visual Arts Galleries Wales (VAGW) is undertaking a research project for Arts Council of Wales:

*“to see how the situation can be improved for individual organisations and the sector as a whole in order to make the visual and applied arts sector more resilient, responsive, enterprising and profitable by using innovation in audience insight to inform programming and marketing.”*

This work has emerged from G39's partnership with Golant Media Ventures, as part of Nesta, Arts and Humanities Research Council's Digital R&D Funding, to design a system for collating audience insights. The platform will enable Arts Portfolio Wales organisations to capture and report their audience data, the equivalent to Arts Council of Wales'

Audience Insight system for ticketed venues. This is an exciting step.

The Welsh visual arts sector recognises that as digital natives grow into adults, with purchasing power and limitless digital choice, the entire visitor experience (including pre and post visit) needs to proactively consider digital opportunities. A lack of capacity and expertise in the Welsh visual arts sector means there is little flexibility to be able to experiment with new digital opportunities beyond a functioning website. That said, G39 has recently undertaken R&D in audience data collection and there are other galleries experimenting at an organisational level, including Mostyn (as outlined earlier).

The New Art of Finance report by Nesta articulates, in other sectors, there is a tradition of public funding to support risky R&D activities that generate socially valuable insights... However, there is a lack in R&D funding for organisations to explore new models of audience engagement, which may give rise to new forms of cultural value.<sup>62</sup>



Paul Granjon, Am I Robot, Festival Season, MOSTYN. September/October 2016.  
Source: Mark McNulty.

61 Office for National Statistics

62 The Art of Finance, Making Money Work Harder for the Arts (Nesta, July 2014)

# Demand: Audiences

## Creative Education

*“At the heart of the Industrial Revolution was the steam that drove the industrial engines of the 18th and 19th centuries. Steam continues to drive the turbines in many of the power stations that generate the electricity on which we completely depend. But it is steam of a different sort that is powering the industrial revolution of the 21st century – STEAM in the form of science, technology, engineering, arts and mathematics.”* Sir Mark Walport, Government Chief Scientific Adviser, Times Higher Education (Feb 2017)

*“We’re moving out of the information economy ... we’re moving into an innovation economy, where the demands on our creativity as human beings – that’s where we’re going to see increasing value in the workplace.”* Frazer Bennett, Chief Innovation Officer, PA Consulting Group, Today Programme, BBC Radio 4 (15 May 2017)

*“... In an age where anyone can produce anything anywhere through 3-D printing, where anyone can broadcast their performance globally or sell to China whatever the size of their business, there is an opportunity for mass employment through mass creativity.”* Mark Carney, Governor of the Bank of England, Roscoe Lecture, Liverpool John Moores University (5 Dec 2016)

Encouragingly, there is a palpable desire by policy-makers, galleries and educators to encourage school aged children into the galleries across Wales, and to ensure children and young people have ample opportunities to ignite and cultivate their own creativity.

*“There is already a rich and varied arts and cultural offer available across Wales. The challenge is in making that more widespread and more relevant to schools.”* Professor Dai Smith, Arts in Education in the Schools of Wales, 2013

There is a dynamic range of creative educational opportunities being delivered across Wales. Many of the arts organisations promote visual and media education and work with specialist learning agencies, schools, colleges, universities and support schemes. This commitment to nurturing the next generation through artistic expression and experimentation, while not to be instrumentalized, is key to raising a generation of innovative, creative problem-solvers, whether they choose a profession in the creative industries or not.

With programmes being rolled out nationwide in Welsh schools, this ‘top-down’ commitment coupled with ‘ground-up’ local expertise and identity positions Wales at the forefront of creative education. We would suggest that this is

likely to be much to the envy of creative sectoral activists and educators in other nations where the STEM (Science, technology, engineering and maths) subjects are being prioritised over STEAM (Science, technology, engineering and maths);<sup>63</sup> As the Cultural Learning Alliance describes, ‘STEAM is about the vital interplay between – and having a parity of esteem for – science, technology, engineering, arts and mathematics.’

Programmes that have national and local reach include:

- Creative Learning through the Arts - an action plan for Wales published in March 2015, the plan is jointly funded by the Arts Council of Wales and Welsh Government, embeds creativity and the arts at the heart of learning through two linked strands of activity, The Lead Creative Schools Scheme and the All-Wales Arts and Education Programme. Lead Creative Schools are given the tools and resource ‘to nurture and develop the creativity of learners so that they achieve their potential, grow as well rounded individuals and are prepared with skills for life’;<sup>64</sup>

63 STEM vs. STEAM: How the sciences and arts are coming together to drive innovation, (The Independent, 25 May 2016); STEAM: Why Stem Can Only Take Us So Far, Cultural Learning Alliance Briefing Paper No. 1, Cultural Learning Alliance and Nesta (2017)

64 Lead Creative Schools Handbook (Oct 2015)

- Criw Celf is a pan-Wales organisation that provides masterclasses to children who have shown talent and/or a special interest in art, in order to develop their skills and experiences. Imaginatively expanding children’s understanding of the definition of what art is and can be, children create alongside professional artists in a variety of different gallery and site-specific settings. Originally conceived and piloted by Gwynedd County Council in 2007, the programme has scaled strategically, and now operates bespoke models in partnership with local authorities and organisations, including all North Wales local authorities (Gwynedd, Flintshire, Conwy, Wrexham, Denbighshire, Powys, Ynys Mon) and Ruthin Craft Centre, Peak (South Powys), Oriel Davies (North Powys), Mission Gallery (Carmarthenshire), Llantarnam Grange (Torfaen), Arts Active (Cardiff) and Neath Port Talbot. Funding is provided by local authorities and Arts Council of Wales;
- Ffotogallery Wales’ outreach projects with schools and community groups reached over 6,000 participants per annum;<sup>65</sup>
- Over 2016/17 Llantarnam Grange Arts Centre facilitated 507 workshop and

65 David Drake, Inquiry into the Accessibility of Arts and Cultural Activities in Wales, CC(3) AC 36 Response from Ffotogallery Wales (23 Sept 2010)

# Demand: Audiences

participatory educational sessions at the arts centre and at other venues as part of our outreach programme and during the year 5,806 people took part in their education programme.

## Potential Cultural Tourism Market

The overall volume of visits to Wales in 2016 increased by 15% compared with 2015 – building on growth on the previous two years. The Office for National Statistics' data shows the number of inbound tourists coming to Wales was up by 12% – to 856,000 in the first nine months of 2016 – the biggest rise in the UK.

With tourists spending around £14m a day whilst in Wales, amounting to around £5.1bn a year, it is evident that tourism plays a major role in the Welsh economy. There is an ambition to grow tourism earnings in Wales by 10% or more by 2020.<sup>66</sup>

With its mix of heritage, culture and countryside being an intrinsic part of the visitor experience, Wales has continued to be an important destination for domestic and international visitors. Most visitors will come into contact with Wales' culture during their trips (mostly by car) – either through generic encounters (sense of place, language, local food and drink, crafts, and music), or through specific visits

to heritage and cultural attractions. The culture and heritage offer is a significant contributor to the Welsh visitor economy. In 2011 (the most recent data available), £146m was spent on holidays where culture was the main activity for the holiday, and £590m was spent on holidays where a cultural activity was undertaken as part of the holiday.<sup>67</sup>

Cadw sites in Wales benefited from the increase in visitors in 2016, welcoming 1.4m visitors to its staffed sites – an 8% increase on the previous year and the heritage organisation's best year on record.<sup>68</sup> The tourism figures published by VisitWales, the national tourism body, identify arts, culture and heritage as among Wales' richest deposits[sic] of wealth and employment.

VisitWales has developed a unified and contemporary Wales brand identity around its landscape, with a focus on narratives about mountains, coasts, castles and sports. Heritage and culture are cited as a key focus for investment in the tourism product and as a way to build the Welsh narrative. It is outlined that there are *"opportunities to enhance the experience of visitors to heritage attractions, museums*

*and cultural venues to sustain their long term viability."*<sup>69</sup>

The refreshed Wales brand strategy and identity have been well received<sup>70</sup> and The Wales Way, VisitWales' campaign launched in early 2018, showcases the stunning Welsh landscape and its historic assets, places to stay and eat. However, there is a striking lack of alignment between cultural tourism and VisitWales' strategic investment in the sector, and its newly launched marketing campaign, The Wales Way.<sup>71</sup> The three routes (Figure 12) in The Wales Way campaign only highlight one visual arts organisation on the map (of approximately total places listed). 19 lie on or close to these routes (Figure 13). More broadly, and underscoring the department's strategy, the VisitWales website prioritises landscape, sport and castles. Users seeking information about the arts are required to 'click through' a minimum of four times before reaching any content related to the visual arts. During this study the lack of arts was noted by the relevant parties including the Welsh Government, MALD and VisitWales. Opportunities for how this might be addressed are likely to be considered.<sup>72</sup>

The objectives of the Wales brand are to *"elevate our status, surprise and inspire, change perceptions, do good things and be unmistakably Wales."* The values are to *"curate, celebrate, create a Wales that is at once authentic, creative and alive."* These are all relevant to any new contemporary art entity.

66 Welsh Government, The Welsh Government Strategy for Tourism 2013 – 2020, Partnership for Growth, 10

67 <http://www.arts.wales/advice/advocacy-toolkit/government-agenda>

68 <http://gov.wales/newsroom/culture-tourism-sport/2017/170601-tourism-experiences-further-growth-in-2016/?lang=en>

69 Welsh Government, The Welsh Government Strategy for Tourism 2013 – 2020, Partnership for Growth, 22

70 Welsh Government, The Welsh Government Strategy for Tourism 2013 – 2020, Strategy Progress Review (Nov, 2016), 12

71 <http://thewalesway.com/>

72 As discussed with the Minister, Lord D Elis-Thomas

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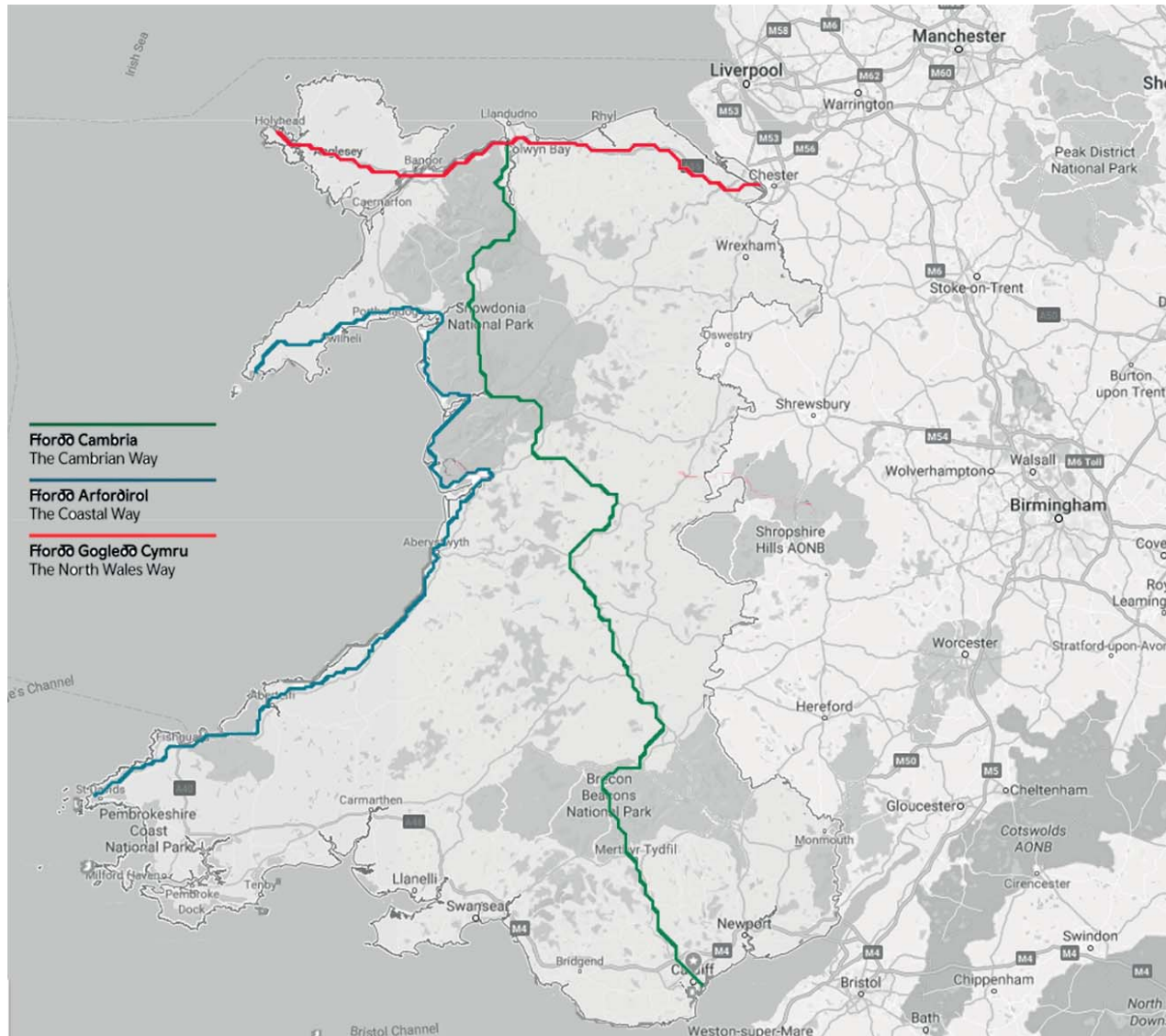


Figure 12: Wales Ways  
Source: VisitWales and Event, April 2018



## Demand: Audiences

Arts Organisations		Wales Way	Arts Organisations		Wales Way
1	Aberystwyth Arts Centre	Coastal Way	16		North Wales Way
2	National Library Wales	Coastal Way	17	Ruthin Craft Centre	North Wales Way
3	Oriel y Parc Gallery & Visitor Centre	Coastal Way	18	Ty Pawb	North Wales Way
4	Plas Glyn y Weddw	Coastal Way			
5	National Museum Cardiff	Cambrian Way			
6	Craft Centre in Bay	Cambrian Way			
7	Mission	Cambrian Way			
8	MOSTYN	Cambrian Way			
9	MOMA Machynlleth	Cambrian Way			
10	Cyfarthfa Castle and Art Gallery	Cambrian Way			
11	Tenby Museum and Art Gallery	Cambrian Way			
12	Chapter	Cambrian Way			
13	G39	Cambrian Way			
14	Oriel Ynys Môn	North Wales Way			
15	Pontio	North Wales Way			

Figure 13: Arts Organisations on the Wales Ways  
Source: Event, March 2018

# Demand: Audiences



## Audiences

### Implications and Opportunity

1. Cultural tourists are an untapped and ready market that should be maximised. Given the small population of Wales and the close proximity of the cross border markets in and around the West Midlands, the benefits of bringing together the cultural and tourism sectors, and government agencies with the National Gallery of Contemporary Art would not only help in the delivery of Partnership for Growth: Strategy for Tourism 2013-2020 in the short term, but provide extended support for the visual and applied arts sector, by increasing interest, footfall and income generation.
2. The National Contemporary Art Gallery Wales should provide an experience that is distinctive to Wales, one that tourists cannot access elsewhere. In particular the experience should draw on the nation's key assets: the stunning Welsh landscape, the language and the unique social and industrial heritage, its art scene - diverse and committed visual arts ecosystem, the high-profile artistic activity (including Artes Mundi, Wales in Venice, Eisteddfod, socially engaged artistic processes and practices and the fast-growing creative industries, as well as the diverse Welsh communities within each of the regions.
3. The quantitative data highlights that international, UK and Welsh families, young people and couples coming on day trips and holidays are key audiences for any new national contemporary art entity. Yet it is unclear what audiences' motivations, expectations and desires around a National Contemporary Art Gallery Wales might be. Further nationwide market research and analysis needs to be undertaken to fully understand the existing and potential audience for the new national entity. This research should: characterise and segment existing and potential audiences – including residents and tourists; quantify the potential and existing cultural tourism market; enable organisations to position themselves individually and collectively to target markets; explore and defined demand for a national centre of contemporary art; inform the underlying operating and financial model for the feasibility study; ensure results can be applied to other initiatives; provide skills in development in research design, delivery and analysis and; build buy-in for any concepts if the study moves forward. This will help to assess the strength of the visitor market and its capacity to support investment for any new entrant into the sector and enable greater accuracy in forecasting.
4. There is an opportunity for any new model for the National Contemporary Art Gallery Wales to combine indoor and outdoor arts attractions, which link closely to the different Welsh communities and the overall sense of place. Moreover, given that tourists tend to stay in Wales for a few days it is worth considering creating connections between cultural sites. These connections could be physical additions in the landscape or any national contemporary art gallery might be positioned in relation to other activities.
5. There is a requirement to stress the significance and creativity in the visual and applied arts in Wales to a greater extent and provide a more integrated approach to tourism, arts and culture. As part of this there is a requirement to promote existing arts organisations throughout Wales as they provide a distinctive sense of place and authentic experiences in line with the Strategy's Place Building strategic aims. Wales would benefit from further 'destination management' through a partnership approach to managing places to ensure tourists have knowledge of and access to the arts offer in Wales.
6. There is a need to ensure that the nation's contemporary arts offer is easily accessible to schools across Wales.
7. There is opportunity for school-aged children and young people – our future artists, educators, patrons, investors, innovators, politicians, board members, global citizens – to be active participants, co-creators and collaborators in the conversation about the role of contemporary art in their lives, and the ambition, function and relevance of a potential Welsh national gallery.

# Key Contexts

## The Economic Case for Investment in Culture and Creativity

The Government's Cultural statement emphasises that:

*"[The creative industries] are a vital engine of our economy. They contribute jobs and wealth and help to put Wales on the map, raising its image world-wide. The latest figures (2014) show that we have over 5,300 creative businesses, which generate over £2.1bn annual turnover, and give employment to over 49,000 people. The culture sector produces talented individuals with transferable skills that benefit our creative industries."*<sup>73</sup>

The visual arts sector is embedded within the wider creative industries, classified by the unique, creative and marketable output at their core, and widely documented as making a significant contribution to the economic well-being of Wales.<sup>74</sup> Across the UK the creative industries are growing at a rate of 11%, twice as fast as the rest of the

economy, as evidenced by Nesta and Creative Industries Council in February 2018.<sup>75 76</sup>

Creative jobs are highly skilled, contribute to productivity growth and are resilient to automation. Nesta's mapping demonstrates that the UK *"is experiencing a boom in creative entrepreneurship - with the number of businesses growing in nine out of 10 places mapped. Creative industries - from architecture to film and advertising - also grew faster than other sectors in four out of five (83%) areas."* Yet, Nesta concludes that if the geography of creative jobs stays the same, three quarters of new creative industries jobs will be in these top 10 areas, none of which are located in Wales.<sup>77</sup> The authors further argue that the *"the creative industries are unlikely to make a dent in the UK's productivity problem unless policymakers can increase the number of high productivity growth scale-up businesses."*<sup>78</sup>

*"The creative industries today are central to the lives of people and businesses around the world. This is now a sector where Wales has no commercial or technological disadvantage... We are constrained only by our talent, our ambition and our determination. The Welsh Government's priority is therefore to provide the support and guidance to ensure that no talent is unfulfilled and no marketable creative idea is wasted."*<sup>79</sup> **Ron Jones, Chair Creative Industries Sector Panel**

Taking a clusters-based approach to the development of the creative industries is being rolled out as a sound strategy for bolstering the sector, and encouraging growth outside of London. The Creative Industries Cluster Programme is investing £80m in eight creative research and development partnerships across Britain and for which Clwstwr Creadigol / Cardiff University is one of 22 shortlisted entries as of February 2018. As the Sector Deal cites, *"If we can get the conditions right and the creative industries continue to outperform the rest of the UK economy, their exports will increase by 50 per cent by 2023, they will be worth £150bn and create 600,000 new jobs."*

<sup>73</sup> The National Assembly's Culture, Welsh Language and Communications Committee, A submission by Wales Arts International: Growing the economic impact of the arts and creative industries on the world stage, Non-public funding of the Arts An Inquiry (Nov 2017) 3

<sup>74</sup> Originally grouped together by the Department of Culture, Media and Sport government in 1998 with sub-sectors including arts, film, television, radio, design, computer, IT and galleries; Department for Culture, Media & Sport, Creative Industries Mapping Documents 2001 (Apr 2001)

<sup>75</sup> Creativity can be taught to anyone. So why are we leaving it to private schools? (The Guardian, Rufus Norris, Jan 2018)

<sup>76</sup> The Future of Skills: Employment in 2030

<sup>77</sup> Includes Milton Keynes, Birmingham, Luton, London, Slough and Heathrow, Edinburgh, Manchester, Leeds, Bristol, Reading; Juan Mateos Garcia, Joel Klinger and Konstantinos Stathouloupoulos, Creative Nation, Nesta (Feb 2018)

<sup>78</sup> Ibid

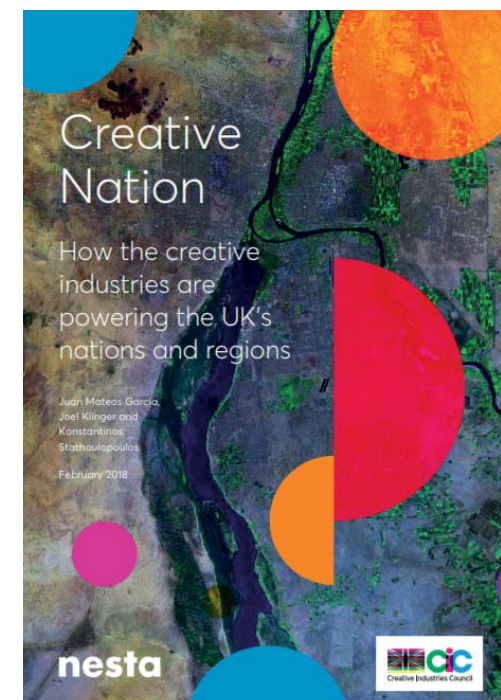
<sup>79</sup> Creative Industries Sector Performance, <http://gov.wales/topics/businessandeconomy/our-priority-sectors/creative-industries/?lang=en>

# Key Contexts

Nesta's Creative Nation study (2018) further argues that cluster-based growth must be contextualised and customised to the location, writing "Different locations across the UK follow a multitude of cluster development models, and what works in one location might not necessarily work elsewhere." The authors identify five creative cluster models: incipient clusters, creative conurbations, creative districts, creative challengers and creative capitals.

## **The Economic Case for Investment in Culture and Creativity Implications and Opportunity**

1. Wales' economic growth is in part dependent on creative innovation at its core, relying on a professional skill-set that is valuable, non-replicable and integral to creative production. Further, the Impact Investment movement suggests that those with the right skills to address society's most pressing challenges may be best placed to find new solutions. The skills that are found to be most immune to robotization include collaborative, interdisciplinary working; the blending of technical and creative skills; and entrepreneurship. Ensuring that the public and the upcoming generation have access to the creative process and experiences could indeed include via an open, progressive national gallery of contemporary art – that both immerses people in surprising or beautiful environments and provides the platforms to nurture these very skills.
2. While the clusters segmentation above focuses on economic growth, the underlying architecture, strategy and ethos of clustering may be applicable to nourishing and building the contemporary art sector in Wales.



Nesta, Creative Nation Study, February 2018



# Key Contexts

## Leadership and Advocacy

Arts leaders, Welsh political leaders and current policies recognise the value and potential impact of culture and the creative industries from a number of perspectives – economic (job creation, inward investment, tourism); social (see Baroness Andrews 2014, Professor Dai Smith, 2013); and reputational (international positioning, ‘soft power’.)

*“We see culture as a priority. We believe in it for its own sake, and in supporting it with public funds. Culture is central to our society and our sense of nationhood.... We start from a good base, but we should aim higher: I want Wales to be the most creatively active nation in Europe. I am determined that we should continue to send a confident, outward-facing message to the rest of Europe and beyond.”<sup>80</sup> Ken Skates, AM, Cabinet Secretary for Economy and Transport*

*“If our government were more confident in the power and value of the visual arts sector, and put their money where their mouth is, others would be more likely to follow.” Artist*

Many interviewed, however, felt that the political recognition of the power of the arts and creative industries has not, in

recent years, resulted in comparable public investment in growth in Wales’ visual arts sector. Thus, while many welcomed the Welsh Government’s political and financial commitment to this study, most interviewed felt the need to temper their enthusiasm until significant financial investment is made.

*“There seems to be a blind spot in government.” Museum Director*

Equally many were concerned that any investment in a national entity would detract funds from existing publicly-subsidised organisations, thus destabilising them. (See page 86, Sector Ambition).

The vast majority of visual arts leaders acknowledged their own lack of coordinated advocacy and the lack of a compelling, evidence-based, strategic case for support for the arts nationally. The Welsh chapter of *What Next?*, a national forum for the arts, aims to re-calibrate these discussions.

Yet consensus remains that visual arts leaders’ failure to lobby government collectively may directly or indirectly be affecting the funding model and capital investment in the visual and applied contemporary arts in Wales. The publication of *Non-public funding of the arts* emphasised these concerns.

## Succession Planning

Many of those consulted highlighted the limited number of senior positions in visual arts galleries in Wales, which prevents junior cultural professionals from progressing within their own organisations, or within the Welsh visual arts sector.

*“There is noticeable hiatus in leadership of key visual arts venues.” Arts Leader*

Similar to the artists professional cycle, cultural professionals in Wales may have to seek employment outside of Wales, or in other sectors, in order to progress. A few suggested that this lack of professional movement has had noticeably negative ramifications:

*“Directors stay in post too long. They should move on 4-5 years in – but they don’t, therefore the sector is inert. 15 years as director is not good for local artists, galleries, curators. They should be going off to work overseas. It needs more fluidity. It needs a laxative.” Artist*

*“I’m not impressed by the ambition of my peers. They seem to lack enthusiasm, ideas or ambition for a bigger opportunity.” Arts Leader*



## Leadership and Advocacy Implications and Opportunity

1. The Welsh Government’s confidence in the power and value of the arts must translate into confident investment.
2. Should the Welsh Government put a significant stake in the nation’s contemporary art sector, it will be in a stronger position to draw disparate external stakeholders together to identify shared ambitions and explore how best to leverage public investment in the nation’s contemporary arts for the greater good.
3. While the visual arts organisations interviewed are ambitious and dedicated to their missions, there is a noticeable lack of strategic planning and advocacy at national level. The membership-body, Visual Arts Gallery Wales, acknowledges that it is not currently performing this function.
4. To drive any contemporary art concept forward at this scale requires key stakeholders to collectively, collaboratively and clearly ensure that the visual arts are integral to conversations about Wales’ future as an inclusive and creative nation.

<sup>80</sup> – Welsh Government, *Light Springs through the Dark: A Vision for Culture in Wales* (Dec 2016)

# Key Contexts

## 2001



- The Review of Art Galleries and Permanent Exhibition Spaces in Wales (Pratley)

## 2002



- Views of the Future (Amgueddfa Cymru Consultation Report)

## 2006



- Wales Art Review (Welsh Assembly Government)
- The Display of Art in Wales (DCA Consultants and Peter Jenkinson)

## 2008

- The Future Display of Visual Art in Wales (ABL Consulting, Levitt Bernstein, Rider Levett Bucknall)

## 2010



- Culture of Innovation: An economic analysis of innovation in arts and cultural organisations (Nesta)

## 2012



- Capital Strategy, 2012-2017 (Arts Council of Wales)

## 2013

- An independent report for the Welsh Government into Arts in Education in the Schools of Wales

## 2014



- Inspire: Our strategy for creativity and the arts in Wales (Arts Council of Wales)
- 10-Year Plan 2014-2024: Unlocking Potential Embracing Ambition (Creative Scotland)
- Wales in the World: Wales Arts International Strategy, 2015-2018 (Arts Council of Wales)
- Rural evidence and data review: Analysis of Arts Council England Investment, Arts and Cultural Participation and

## 2015



- The Well Being of Future Generations (Wales) Act 2015
- Culture and Poverty: Harnessing the power of the arts, culture and heritage to promote social justice in Wales (Baroness Kay Andrews OBE)
- Local Museum Provision in Wales (Dr Haydn E Edwards, Chair of Expert Review)
- Wales in the World: Wales Arts International Strategy, 2015-2018 (Arts Council of Wales)
- Rural evidence and data review: Analysis of Arts Council England Investment, Arts and Cultural Participation and

- Audiences (2015)
- Plus Tate: Connecting Art to People and Places (Tate, Schutt)

## 2016



- Light Springs through the Dark: A Vision for Culture in Wales (Ken Skates)
- Pioneer Area Programme Pilot Year Evaluation Final Report
- Understanding the Value of Art and Culture: The AHRC Cultural Value Project (Crossick and Kaszynska, Arts and Humanities Research Council)
- The value and impact of Wales' presence at the Venice Biennale for the visual arts sector

- in Wales: Wales in Venice (Arad Research)
- The Culture White Paper (UK Department of Culture, Media and Sport)
- Visual Arts Sector Review (Creative Scotland)

## 2017



- Arts Council of Wales, Remit-Letter (Welsh Government)
- Arts Portfolio Wales Survey 2016/17: Key Findings (Arts Council of Wales)
- Review of Amgueddfa Cymru – National Museum Wales (Dr S Thurley)

## 2018



- Building Resilience Inquiry into non-public funding of the arts (National Assembly for Wales, Culture, Welsh Language and Communications Committee)
- National Contemporary Art Gallery Wales Preliminary Feasibility Study and Options Appraisal (Event)

Figure 14: Key Policies and papers  
Source: Event, April 2018

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# Key Contexts

## Capital Investment

As a result of the 2008 Feasibility Study, the Welsh Government / Arts Council of Wales contributed to the capital costs of a suite of visual art gallery capital projects, totalling £25m. These included the West Wing of the National Museum Cardiff (£6.5m, 2011) and capital contributions to Chapter Arts Centre (Refurbishment, £3.8m, 2009), Aberystwyth (total £1.25m, 2009), Mostyn in Llandudno (total £5.1m, 2010), Glynn Vivian in Swansea (total £6m, 2016) and Ty Pawb in Wrexham (total £4.7m, 2018<sup>81</sup> with £700k as a result of VVP<sup>82</sup>) (Figure 15).

Independent galleries have also undertaken their own capital projects, funded by a combination of public and private investment, over the past decade. These include Plas Glyn y Weddw on the Llyn peninsula, Oriel Ynys Mon in Anglesey and MOMA in Machynlleth.

Pontio Arts Centre opened in 2017 as part of Bangor University's Arts and Innovation Centre. The Centre funded by ACW, Welsh Government, EU Funds and Bangor University, does not house an art gallery (with its neighbour, Storiell, performing this function immediately across the road). Yet the structure lends itself to a curated programme of digital work, which could include cross-medium and visual arts.

A number of these organisations have undertaken economic impact assessments, quantifying tangible economic return through combined supply-chain and induced spending, additional spend in the local economy, job creation and return on investment.<sup>83</sup>

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81 £1.56m from Wrexham Council; £2.3m by the Welsh Arts Council, Stakeholder interview

82 Vibrant and Viable Places (VVP) is a regeneration framework that was produced by Welsh Government in March 2013. The vision was 'that everyone in Wales should live in well-connected vibrant, viable and sustainable communities with a strong local economy and good quality of life'. Wrexham was successful in securing £10.5m investment from the Vibrant and Viable Places Programme. Along with match funding, Wrexham received a £24m boost, used for various regeneration projects which will help to create jobs, increase housing supply, tackle poverty, help create work and learning opportunities and improve community facilities

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83 Plus Tate

# Key Contexts

Arts Organisation	Date	Total Capital Budget	Arts Council Lottery Scheme	Local Authority & Other	Welsh Government
Wales Millennium Centre, Cardiff	2004	£106m	£10m	£41m from National Lottery - Millennium Commission	37m
Chapter Arts Centre, Cardiff	2009	£3.8m	1.75m	£71,000 from the Big Lottery Fund, £172,000 from the European Regional Development Fund	£850K
Aberystwyth Arts Centre Creative Units, Aberystwyth	2009	£1.25m	350k	0	0
MOSTYN, Llandudno	2010	£5.1m	£3m	£1.9 from Cadw, Llandudno Council, Mostyn Estates, Carlton North Wales, Foyle Foundation, Rayne Foundation, Colwinston Charitable Trust, Nigel Moores Foundation, Garfield Weston Foundation, The Foundation for Sport and the Arts, and Friends of Oriel Mostyn.	£200k
Glynn Vivian Art Gallery, Swansea	2016	£6m	£2m	£500k	£3.5m, including £550,000 from the Swansea Regeneration Area programme
Storiell, Bangor	2016	£2.1m	£100k	£200k	Unknown
Ty Pawb, Wrexham	2018	£4.7m	£2.3m	£1.7m	£700k VVP

Figure 15: Public capital investment in Welsh arts organisations  
Source: Event, April 2018

Arts Organisation	Year	Investment (£)
West Wing, National Museum Cardiff	2011	£6.5m
Ruthin	2008	£4.4m
Aberystwyth Arts Centre	2000	£1.25m
MOSTYN	2010	£5.1m
Glynn Vivian	2016	£6m
Pontio	2015	£56m
Ty Pawb	2018	£4.5m

Figure 16: Total capital investment in Welsh organisations  
Source: Event, April 2018

Arts Organisation	Year	Investment (£)
Two were in Wales (total of £11.1m)		
Cornerhouse/HOME	2015	£25m
First site	2011	£28m
Grizedale	2009	£1.3m
The Hepworth	2011	£35m
Kettle's Yard	2018	£10m
MIMA	2007	£14.2m
Nottingham Contemporary	2009	£20m
The Pier Arts Centre	2007	£4.5m
Towner	2009	£8.58m
Turner Contemporary	2011	£17.4m
Whitworth Art Gallery	2015	£15m
Wysing Arts Centre	2008	£1.7m

Figure 17: Total capital investment in PlusTate organisations  
Source: Becky Schutt, Amanda King

# Key Contexts

## 2000



- Aberystwyth Arts Centre, Aberystwyth University (Refurbishment, £4.3m)
- G39 incorporated (after 1998 establishment)
- CVA closes, followed by audit by the National Audit Office (Arts Council of Wales)

## 2003



Oriel Davies Gallery (Phase one: extension and refurbishment)

## 2004



- Oriel Davies Gallery (Phase two: extension, £1.7m)
- G39 – the first artist-run space in Wales to be supported by a revenue agreement with Arts Council of Wales

## 2008



- Ruthin Craft Centre (New build, £4.4m)
- Oriel Kyffin Williams opened at Oriel Ynys Mon (£1.5m gallery)

## 2009



- Aberystwyth Arts Centre, Aberystwyth University (Development of artist studios complex, £1.25m)
- Chapter Arts Centre (Refurbishment, £3.8m)

## 2010



- MOSTYN, Llandudno (Extension and refurbishment, £5.1m)

## 2011



- West Wing at National Museum Cardiff (New Galleries for modern and contemporary art, £6.5m)

## 2016



- Storiell (£2.1m)
- Glynn Vivian in Swansea (restoration, refurbishment and extension, £6m)

## 2017



- Aberystwyth Arts Centre, Aberystwyth University (cinema uplift)
- Pontio (development, £56m)

## 2018+



- Ty Pawb (development, £4.7m)
- Oriel Myrddin in Carmarthen exploring capital development; preparing application to ACW
- Plas Glyn y Weddw exploring capital development
- Chapter exploring further capital development
- Ffotogallery requires a long-term home
- National Museum Cardiff masterplan

Figure 18: Overview of capital investment in Welsh cultural projects over the last 18 years

Source: Event, April 2018



# Key Contexts

## Projects in the pipeline

There are a few cultural infrastructure projects in the pipeline for refurbishment and uplifts, with one proposed new venue in Cardiff Bay, as part of a wider redevelopment plan for Cardiff Bay outlined in the November 2017 Green Paper Consultation Building More and Better Jobs. While this list is not exhaustive, it does demonstrate strong geographic spread. (Figure 19).

National Library Wales and National Museum Cardiff are also in the stages of developing masterplans.

Arts Council of Wales Capital Programme, established in 1997, distributed £125m funds for both minor (less than £100K) and major capital projects (more than £100K) in that time. While the Programme closed in autumn 2017, some projects have been retained, including Oriel Myrddin and Chapter, the latter of which will receive a nominal capital allocation. While this may not be on the ambitious scale originally envisaged, it is likely that there will be some redevelopment of Chapter's site in Cardiff. Other projects, such as Plas Glyn y Weddw, are seeking capital support from other sources.



A new attraction in the Graving Docks  
Source: From Building More and Better Jobs, Cllr Russell Goodway, Cabinet Member for Investment and Development, March 2018  
Plas Glyn y Weddw (1-4 gallery extension)  
Source: Donald Insall Associates, 2018

Site	Updates	Total Capital Budget
Cardiff Bay – Cultural Attraction	Cited in Building More and Better Jobs – a Consultation Green Paper, 2017 – In consultation	Not yet published
Conwy Cultural Centre	Planning Application approved March 2017	£2.67m
Plas Glyn y Weddw	Fundraising underway - Catering facilities and amenities	£500K
MOMA Machynlleth	Owned and managed by the The Machynlleth Tabernacle Trust. Construction commenced - Storage and office facilities adjacent to main site	Portion of £734K raised privately by the Trust for a range of capital projects over ten years
Oriel Myrddin Gallery	Directly managed by Carmarthenshire County Council's leisure services, remodelling of the existing gallery plus an extension into King Street.	Formerly included within ACW capital programme
Aberystwyth Old College [currently being used for artists studios]	Aberystwyth University's heritage and cultural mixed-use development, including potentially an art gallery	£19.47m
Golden Grove / Gelli Aur (Carmarthenshire)	Owned and managed by Golden Grove Trust, Development of historic property into cultural venue	Not publicly available

Figure 19: Welsh Projects in the Pipeline  
Source: Event, April 2018

# Key Contexts

## UK and Global Cultural Investment

£25m of investment in capital projects in the Welsh visual arts sector over the past ten years for a population of only 3.1m people is a seemingly impressive figure. (Figure 16)

*“Culture has been systematically under-funded for many years.”* Museum Director

Yet within Wales the visual arts sector receives an imbalance in available public funds for capital projects as compared to other art forms. Some interviewed suggest this is a reverberation of the art historic legacy of Wales, with deep-rooted tradition in literature, performance and music – rather than visual arts. Arts Council of Wales has distributed £19.88m in Lottery Funded capital grants since 2008; only 9% has been for visual arts projects.

Further, and perhaps more significantly, compared to other governments’ and international trends in cultural infrastructure investment, the Welsh Government’s investment in visual arts capital infrastructure is dwarfed.

In the course of this study alone, Great Britain and Ireland governments have announced significant figures being allocated to cultural infrastructure:

- Tate St Ives £20m extension opened in autumn 2017, with Tate Modern’s £260m extension opening two years prior;
- The large-scale cultural investment includes £80.1m construction of the new V&A Museum of Design in Dundee, Scotland (due for completion in summer 2018 and part of a European Capital of Culture 2023 Bid); a £16.8m extension to the Scottish National Gallery in Edinburgh (due for completion in autumn 2018); and a £10m refurbishment of the National Library of Scotland in Causewayside, Edinburgh (due for completion in March 2018);<sup>84</sup>
- Northern Ireland is preparing a joint bid between Derry/Belfast for European Capital of Culture 2023 and The Big Art Debate in February 2018 called for politicians to be *“be courageous and visionary by pledging to invest in the arts sector.”*<sup>85</sup>
- Ireland announced over £1.2bn (€1.4bn) in cultural infrastructure investment;<sup>86</sup>
- Manchester announced the next stage of The Factory, a £111m new arts centre designed by Rem Koolhaas and the Office for Metropolitan Architecture (OMA), on the heels of the opening of Home (£25m, 2015. Sir Richard Leese, Leader of Manchester City Council, has said The Factory would *“make Manchester and the wider region a genuine cultural counterbalance to London.”*<sup>87</sup>
- Hull City of Culture 2017 was a £32.8m programme which leveraged a further £48m for capital investment in public realm enhancement and the Ferens Art Gallery and Hull New Theatre.<sup>88</sup>

Beyond the British Isles, forthcoming projects totalling more than £175bn (\$250bn), and each individually costing in



V&A Dundee under construction, 2017

Source: Laerol

The Ferens Art Gallery illuminated at the opening event, Hull City of Culture 2017

Source: Kim Dent-Brown



<sup>86</sup> Project Ireland 2040: National Planning Framework; The 1.4bn Euros includes the expansion of the Arts and Cultural Development capital scheme, new investment and investment in existing infrastructure (including 460m Euros for phased investment in The National Cultural Institutions, the National Museum of Ireland, The National Library Crawford Gallery, the National Archives of Ireland, the National Concert Hall, National Gallery, Abbey Theatre, Irish Museum of Modern Art and Chester Beatty Gallery

<sup>87</sup> Manchester’s Factory arts building gets go-ahead (The Guardian, 27 Jan 2018)

<sup>88</sup> Culture, Place and Policy Institute University of Hull, Cultural Transformations: The impacts of Hull UK City of Culture 2017 Outcomes Evaluation (Mar 2018)

<sup>84</sup> Cabinet Secretary for Culture, Tourism and External Affairs, Scottish Government

<sup>85</sup> Northern Ireland arts sector needs investment (Belfast Telegraph, 19 Feb 2018)

# Key Contexts

excess of £10m, were identified globally in a 2013 mapping for UKTI and British Council.<sup>89</sup> In 2016, 101 large-scale cultural infrastructure projects (including 89 museums) worth approximately £5.87bn (\$8.45bn) were completed, while 135 projects were announced worth £5.87bn (\$8.45bn) with a median budget of approximately £25m (\$36m).<sup>90</sup>

There have been 29 completed museum projects in Europe including an extension to Art Museum Basel (Kunstmuseum)<sup>91</sup> (£73m, \$104m) and new builds including the Design Museum London (£83m, \$120m), Luigi Pecci Centre for Contemporary Art (£10.7m, \$15.3m, Prato, Italy), Brussels' Millennium Iconoclast Museum of Art (MIMA) (£13.8, \$19.7m), Museum of Art, Architecture and Technology (MAAT) in Lisbon (£14.3m, \$20.3m) and the National Museum of Contemporary Art in Athens (£26m, \$37m).<sup>92</sup>

These highly visible investments are aimed at achieving international positioning, nation-building, socio-cultural impact, tourism growth, talent attraction, inward investment and economic (re)generation.

The rationale for global investment in culture is represented by the statement of The New South Wales Government (Australia), which announced £156.5m (\$222m) in major cultural infrastructure projects, part of an £619.7m (\$879m) suite of investments to rejuvenate cultural infrastructure:

*"This investment is essential to the Government's vision for NSW to be known for its bold and exciting arts and culture that engages the community, supports innovation, facilitates economic development and reflects the state's rich diversity."*<sup>93</sup>

<sup>89</sup> Adrian Ellis and Becky Schutt, British Council and UKTI, AEA Consulting, Large-Scale Cultural Infrastructure Mapping (2013)

<sup>90</sup> AEA Consulting, Cultural Infrastructure Index 2016 Extension - Christ & Gantenbein - Architects, 3,295sqm

<sup>92</sup> AEA Consulting, Cultural Infrastructure Index 2016

<sup>93</sup> <https://www.create.nsw.gov.au/category/cultural-infrastructure/>



Exterior and Interior  
Design Museum, London  
Source: Event, April 2018

## Key Contexts

Arts Organisation	Year	Investment (£) Under £10m
Aberystwyth Arts Centre	2009	£1.25m
Grizedale Arts, Coniston	2009	£1.3m
Wysing Arts Centre, Cambridge	2008	£1.7m
Chapter Arts Centre, Cardiff	2009	£3.8m
Ruthin Craft Centre, Ruthin	2008	£4.4m
Ty Pawb, Wrexham	2018	£4.5m
The Pier Arts Centre, Stromness	2007	£4.5m
MOSTYN, Llandudno	2010	£5.1m
Glynn Vivian, Swansea	2016	£6m
West Wing, National Museum Cardiff	2008	£6.5m
Towner Gallery, Eastbourne	2009	£8.58m
Arts Organisation	Year	Investment (£) £10-19m
Kettle's Yard, Cambridge	2018	£10m
Portobello Arts Hub, London	Planned	£10m
National Library of Scotland	2018	£10m
National Library, Dublin	Planned	£10.5m
Battersea Arts Centre, London	Planned	£13.3m
MIMA, Middlesbrough	2007	£14.2m
Whitworth Art Gallery, Manchester	2015	£15m
Scottish National Gallery, Edinburgh	2018	£16.8m
Turner Contemporary, Margate	2011	£17.4m
Crawford Art Gallery, Cork	Planned	£19.2m

Arts Organisation	Year	Investment (£) £20-£30m
Nottingham Contemporary	2009	£20m
Tate St Ives	2017	£20m
New Art Gallery, Walsall	2000	£21m
The Curve, Slough	2016	£22m
Kelvin Hall redevelopment, Glasgow	2017	£24m
Cornerhouse/HOME, Manchester	2015	£25
Bournemouth Cultural Quarter	Planned	£25m
The Barras Market Cultural and Events Quarter, Glasgow	Planned	£27m
Firstsite, Colchester	2011	£28m
Arts Organisation	Year	Investment (£) £31-60m
The Hepworth, Wakefield	2011	£35m
Storyhouse, Chester	2017	£37m
Scottish Chamber Concert Hall, Edinburgh	Planned	£45m
V&A Exhibition Road extension, London	2017	£48m
Courtauld Institute, London	Planned	£50m
Pontio, Bangor	2015	£56m

Arts Organisation	Year	Investment (£) £61-£900m
V&A Dundee	2018	£80m
Design Museum, London	2016	£83m
The Factory, Manchester	2020	£111.7m
Hull Cultural Infrastructure Project	2013	£122m
Tate Modern, Switch House extension, London	2016	£260m
National Cultural Institutions, Ireland	Planned	£401.5m
Olympicopolis, London	Planned	£850m

Figure 20: Capital investment in arts organisations globally, ranging from £1m to £850m  
Source: Event, April 2018

# Key Contexts



## Capital Investment Implications and Opportunity

1. If Wales aims to compete in the global knowledge economy, one strategy is to accelerate and boost its investment in cultural infrastructure. Yet it is worth considering whether Wales could 'leapfrog' the global trend in building single large-scale cultural facilities and not simply invest in capital because other governments have identified this investment as the solution to social-cultural-economic challenges and global positioning. Wales has opportunity to assess what Welsh contemporary art and Welsh society requires in the 21st century and identify an authentic solution.
2. Infrastructural investment must bolster rather than destabilise Wales's existing visual arts infrastructure, which has been methodically invested in over the past ten years.
3. Consideration should be given to the development and delivery of a new form of national gallery of contemporary art for the 21st Century that contests some often presumed norms about a gallery's physical form:

- Release contemporary art from its dependency on 'white-box' exhibition spaces and provide a wealth of different types of spaces that artists can respond to;
- Remove defined boundaries and enable a much more flexible approach to what a gallery is and could be, as visitors increasingly move from being passive observers to active creators. Wales has demonstrated the powerful nature of this participatory approach alongside high-profile examples in the UK:
  - Architect and visual artist Apolonija Šušteršič's 'Politics "In Space" / Tiger Bay Project' for Artes Mundi 5 created a platform for reflection and discussion on the redevelopment of Cardiff Bay in National Museum Cardiff's West Wing Galleries (2012)
  - Tanya Bruguera staged the performance work 'Tatlin's Whispers #5' in the main hall of National Museum Cardiff at Artes Mundi 5 (2012)
  - Keith Harrison installation 'Mute' 2015 in Fragile? at National Museum Cardiff was created as a large sound-system covered in gold tiles. Harrison invited visitors to play vinyl records to cause the work to self-destruct (2015)
  - Martin Creed's Work No. 850 at Tate Britain, encouraged the exploration of human movement and spirit by inviting the public to sprint up and down the main atrium (2008)
- Anthony Gormley's One & Another enabled 2,400 people to occupy the Fourth Plinth in Trafalgar Square every hour for 24 hours over 100 consecutive days and was live-streamed by Sky Arts continuously; In doing so the public became the artist and the art (2009)



# Key Contexts

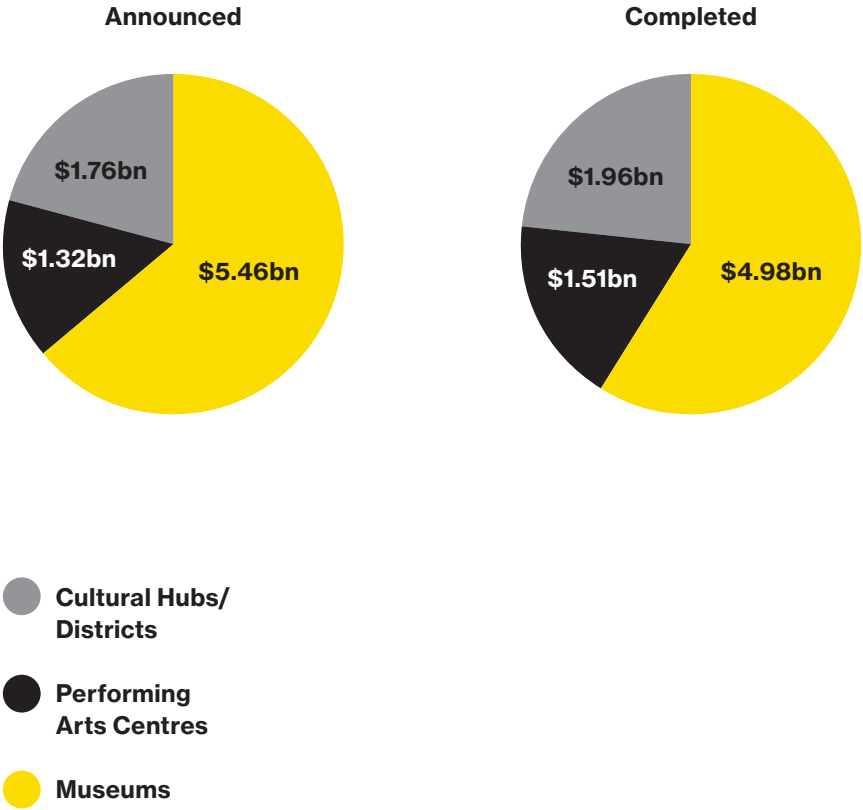


Figure 21: Announced and completed capital investment in arts organisations globally by type  
Source: AEA Consulting, 2016

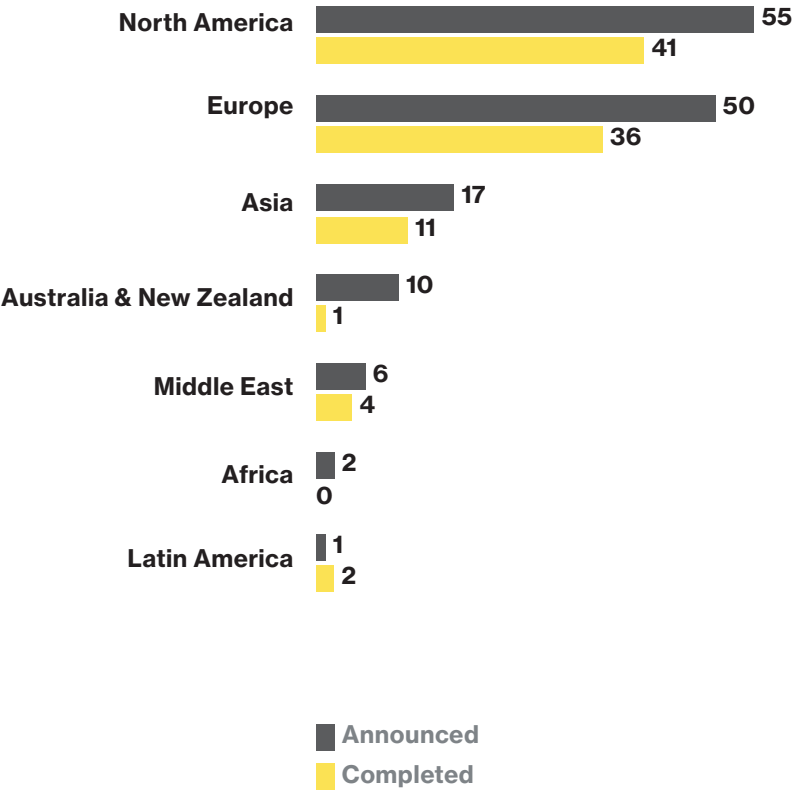


Figure 22: Announced and completed capital investment in arts organisations globally by region  
Source: AEA Consulting, 2016

# Key Contexts

## Exhibition and storage space

Figure 23 shows the current high-quality, museum-standard exhibition space available for the display of contemporary art in Wales.

The National Museum Cardiff offers an 1,040sqm of permanent and temporary exhibition space to present the modern and contemporary collection, which is acquired and owned by Amgueddfa Cymru but regularly drawing on external funding support, notably an important long-term partnership with the Derek Williams Trust. The space allocation for contemporary art in the Upper West Wing, National Museum Cardiff is 727sqm (Figure 23) with approximately 1,270 wall sqm. In addition, there is a 150sqm Photography Gallery at the National Museum Cardiff, with approximately 233 wall sqm. However, these spaces are insufficient to show the larger and more recent contemporary works in the collection and comprehensive solo exhibitions by artists linked to Wales.<sup>94</sup> Moreover the Amgueddfa Cymru lacks the revenue budgets to regularly show its own film, video and installation works by adapting the gallery spaces as required:

*“We can’t fit the exhibition in the gallery.”*  
**Museum Director**

Spaces	sqm
Average (median of the sample (16)- page 39) permanent exhibition space in Wales	319
Average (mean of the sample (13)- page 39) temporary exhibition spaces in Wales	493
Largest temporary exhibition space in Wales: National Museum Cardiff	727
Largest temporary exhibition space in Wales: National Library of Wales	722

Figure 23: Scale of largest and average contemporary art exhibition spaces in Wales

Source: Event, April 2018

Further, while the current footprint at National Museum Cardiff allows for the display of large-scale temporary art exhibitions, this is at the expense of showing the permanent collection.

Major temporary exhibitions, curated by Amgueddfa Cymru or externally (including Artes Mundi), can only be put on view if the permanent collection is de-installed from the West Wing of the National Museum Cardiff. Therefore objects from the contemporary art collection of Wales are never permanently on view anywhere in Wales, severely limiting the public’s access to the nation’s collection. Only 25%-30% of the post-1900 collection (excluding works on paper) can ever be on display at any one time<sup>95</sup> so this figure drops when a loans-in show is in the galleries, for example during Artes Mundi. If the works on paper in the collection are taken into account this figure drops to nearer 8%. While it is commonplace for most collecting-institutions to display only a small portion of their collections at any given time (approximately 90% of total UK collections are in storage), Amgueddfa Cymru’s challenge in having to regularly de-install

<sup>95</sup> This would only be when we have a collections-based exhibition in galleries 19-24

Example Exhibitions	Size (sqm)
A Century of Chairs, Design Museum	200-400
Pop Art in Print and Jameel Prize, V&A	200-400
The Fabric of India, V&A	500-700
Art of Nature: Three	500-700
Centuries of Natural History Art, NHM	500-700
Women, Art, and Social Change: The Newcomb Pottery Enterprise, Smithsonian, USA	1,000-1,100
Future Design, V&A	1,000-1,100

Figure 24: Sizes of example touring exhibitions

Source: Event, April 2018

<sup>94</sup> For example, the recent Ivor Davies and Gillian Ayres shows were selective retrospectives only

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the permanent collections raises the barrier to view the nation's collection.<sup>96 97</sup>

The current exhibition space in Wales (Figure 23) is not adequate to enable Wales to participate in the international touring exhibition market – either to 'import' exhibitions or export contemporary art exhibitions developed in Wales. Figure 24 shows the average space required to receive international touring exhibitions, which tend to fall into three categories:

This international circuit is a key platform for positioning Welsh art abroad and bringing international works of art, and the interpretation that comes with it, to communities in Wales.

As for the wider visual arts sector, the majority of those interviewed highlighted that the existing infrastructure does not meet their needs or ambitions, including to display their own curated exhibitions and to host touring exhibitions.

*"We always think about Welsh culture and what you do in a local global context but... we can't be a part of these major exhibition networks."* **Museum Director**

*"Our ambition is not matched by our physical footprint."* **Museum Director**

*"There is a dearth of proper spaces at any scale."* **Established artist**

While there are 106 accredited Welsh Museums, only 12 of these art galleries meet the Museum Accreditation standards required to enable loans of national collections. These include: Parc Howard Museum and Gallery, Storiol, Oriel Ynys Môn, Newport Museum and Art Gallery, Glynn Vivian Art Gallery, Cyfarthfa Castle Museum and Art Gallery, MOMA Machynlleth, Oriel Plas Glyn y Weddw, Tenby Museum and Art Gallery, Amgueddfa Cymru, Aberystwyth University School of Art Museum & Galleries, University of South Wales Art Collection (Figure 25). In addition, Chepstow Museum and Abergavenny Museum both had Sharing Treasures funding that refurbished galleries to enable art loans from national collections.

Moreover, our research shows that there is also a lack of suitable storage space. A large majority of the arts organisations have no storage at all or very limited

storage. This is primarily because they are temporary galleries; the exceptions are the national institutions.

For example, the National Library of Wales houses all of its artworks on site in Aberystwyth. There is approximately 1,000sqm of painting storage (across four separate spaces) however, there is no spare capacity.

Similarly at Amgueddfa Cymru there are nine storage areas for fine art totalling approximately 700sqm. Storage rooms range from 20sqm to 200sqm, with seven spaces at the National Museum Cardiff and Nantgarw housing the remaining two (170sqm and 50sqm). Storage is largely organised by media, for example, works on paper are held in two stores, sculpture in one, installation in another. In some stores 100% of the works are modern and contemporary, in others it is as low as 20%. The fragmented nature of this storage makes public and technical access complex and time-consuming.

Approximately 80% of the collection is stored at the National Museum Cardiff, but all large sculptures and installations are at Nantgarw and transported to the National Museum Cardiff when required for display. The nine stores are already over capacity, with collections care and access already an issue as a result. This is a huge issue given

that over a 10 year period the Amgueddfa Cymru's national collection grows by an average of around 300 works (ranging from prints to major installation acquisitions) with 90% growth in the post-1900 collection.

*"We are lacking capacity. I'm excited about the potential of pooling resources."* **Gallery Director**

96 Exhibitions space constraints aside, museums may not show works of art that do not fit with the curatorial mission; that are particularly delicate and require sensitive and limited lighting; or because they are located off-site due to storage constraints

97 Suzanne Keene, Collections for People (UCL Institute of Archaeology, 2008) It is notable that in ten years since this study was published significant strides have been made to digitise and share collections in new ways

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	Name of Museum	Location	Museum Type	RD Number	Date Achieved Accreditation
1	Parc Howard Museum and Gallery	Carmarthenshire	Local Authority Museum	2043	10/05/18
2	Oriel Ynys Môn	Isle Of Anglesey	Local Authority Museum	156	29/11/17
3	Newport Museum and Art Gallery	Newport	Local Authority Museum	1329	08/03/18
4	Brecknock Museum	Powys	Local Authority Museum	1506	25/07/14
5	Glynn Vivian Art Gallery	Swansea	Local Authority Museum	281	25/02/16
6	Cyfarthfa Castle Museum and Art Gallery	Methyr Tydfil	Independent Museum	289	25/02/16
7	MOMA Machynlleth	Machynlleth	Independent Museum	928	02/12/15
8	Oriel Plas Glyn y Weddw	Pwllheli	Independent Museum	2293	08/03/18
9	Tenby Museum and Art Gallery	Tenby	Independent Museum	1241	21/11/13
10	National Museum Cardiff	Cardiff	National Museum	1697	18/07/13
11	Aberystwyth University School of Art Museum & Galleries	Aberystwyth	University Museums	1912	07/10/16
12	University Of South Wales Art Collection	Pontypridd	University Museums	2023	23/02/17

Figure 25: Accredited Welsh Museums

Source: Accredited Museum, Welsh Government

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## Exhibition and Storage Space Implications and Opportunity

1. There is a gap in supply for high-quality, sufficiently large exhibition spaces (i.e. a minimum of 800sqm) that can accommodate international and national shows and larger and more complex artworks across the country. Availability of such spaces will enable Wales to both develop its own exhibitions to tour nationally and internationally and to welcome blockbuster travelling exhibitions – essentially building the nation's profile overseas and encouraging international dialogue through art at home.
2. There is a requirement for high-quality storage space for the national collections to ensure the contemporary visual and applied arts collection continues to grow to reflect contemporary life. There is an opportunity to invest in collective storage space for a dispersed collection.

## Operating Model

*"Sometimes, the complex recipe required for a vital, vibrant cultural ecology is misunderstood or misread by civic leaders feeling the global pressure to catch up. The result can be over-built, under-programmed and decontextualised cultural transplants struggling to figure out how to live comfortably in their arresting dollops of starchitecture."* **Adrian Ellis**

While capital investment in culture is set to continue at record paces around the world, the challenge of ensuring revenue funds are available to sustain any public art gallery is ongoing. Museums in the UK, including Middlesbrough Institute of Modern Art (MiMA), part of Teesside University, opened to great acclaim and yet took some time to bed in.

MiMA has earned a good reputation in the art world but costs £1m a year to the council, which is having its budget cut by £50m over the next four years. In 2010, the town was ranked as the least able place in the country to cope with economic shocks like public sector cuts.<sup>98</sup>

More recently, New Art Gallery Walsall has faced closure in 2016/7 as a result of cuts to local authority funding (reduction by 25% each year for four years). It was hailed a

symbol of social and economic regeneration of Walsall<sup>99</sup> and yet in June 2017 it was under threat of closure by Walsall Council due to "continued austerity" measures. Following a high-profile public petition signed by 20,000, Arts Council England has agreed to invest £3,525,948 in New Art Gallery between 2018 and 2022.<sup>100</sup>

Colchester's £28m Firstsite Gallery was "plagued by falling visitor numbers" four years after opening in 2011. In 2015 it was reported that the Gallery was set to lose £500,000 that financial year despite two injections of funding. The Gallery subsequently lost its National Portfolio Organisation status (three-year funding agreement) from Arts Council England. The Gallery is experiencing a turnaround under Interim Director Anthony Roberts, including an uplift in visitor figures for the first time since opening and a business plan bought in by key funders.



Middlesbrough Institute of Modern Art  
Source: Francis Hannaway, 2013  
New Art Gallery Walsall  
Source: Elliott Brown, 2014

<sup>98</sup> Ian Youngs, Arts Reporter, BBC News

<sup>99</sup> Closure of New Art Gallery Walsall (The Guardian, Culture, 30 Nov 2016)

<sup>100</sup> Jack Averty, Council boss 'delighted' as £3.5m funding saves Walsall's New Art Gallery (Express and Star, 28 June 2017)



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## The Business Model

The business model for the publicly-funded visual arts sector in Wales is defined by three income sources:

- Public subsidy – Welsh Government, Arts Council of Wales, Local Authorities and HLF;
- Contributed income – foundation and trust support and private income (individual and corporate, including membership);
- Earned income – including ticketing, catering, retail and venue hire.

## Public Subsidy

The vast majority of the Welsh Government's budget allocations for the arts are for the Arts Council of Wales:

- £31.2m revenue out of £31.7m is allocated in the 2017-18 draft budget. Revenue funding in this area increased by 3.5% in cash terms compared to the 2016-17 budget, following a number of years of cuts;
- Real-terms public funding of the Arts Council (grant-in-aid funding from the Welsh Government and funding from the National Lottery) has reduced over the past decade from an original cash figure of £29.5m in 1995-1996 to an RPI adjusted figure of £26.7m in 2016-17.

*"Welsh Government and National lottery funding for the Arts Council of Wales has fallen in real terms over the last decade by 10% with the Welsh Government calling on the sector to reduce its dependence on public spending."*<sup>101</sup>

The Arts Portfolio Wales (APW), the nation-wide network of 67 revenue-funded arts organisations, receive £27m Arts Council Grant-in-Aid (GIA) and Local Authority support of around £4.6m.<sup>102</sup>

There are ten visual arts organisations in the APW, which receive 6.3% (£1.7m) of the total available GIA funding, ranging from £45k to £376k, alongside an addition to £520K in project funding.

Arts Council of Wales also distributes project funding. There were 1,089 applications over the three financial years 2015/16 to 2017/18 with an element of Visual Arts within the project; 267 of the 1,089 applications were purely visual arts projects.

However, existing Arts Council revenue funding agreements for Welsh visual arts organisations are well-below investment in comparable organisations from Arts Council England and Creative Scotland

<sup>101</sup> National Assembly for Wales Culture, Welsh Language and Communications Committee, Building Resilience: Inquiry into non-public funding of the arts (Mar 2018) 5

<sup>102</sup> Arts Council of Wales, Non-public Funding of the Arts: Consultation, CWLC(5) ART06, Evidence from Arts Council of Wales

	Arts Council England	Arts Council Wales	Creative Scotland
All	293K	188k	-
Building-based only	520k	132k	350k

Figure 26: Visual Arts Portfolio, Average 1 Year Spend  
Source: Event, Jan 2018

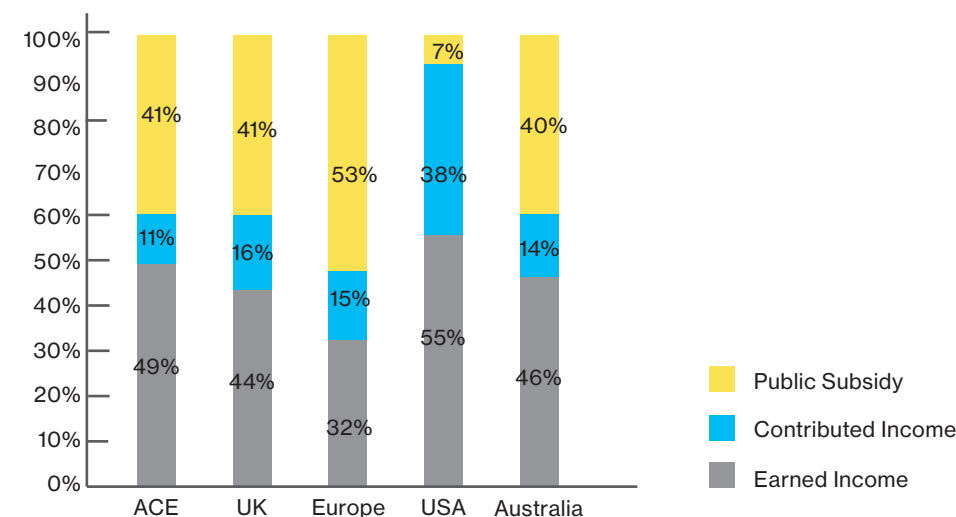


Figure 27: Tripod economy by region  
Source: Becky Schutt, 2016

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(Figure 26). Many attribute this to the devolution legacy.

*“Public galleries in Wales aren’t aligned to funding at the same level of public received in Arts Council England.”*

In the UK, the “main organisations ACE funds consisted roughly of 40% subsidy, 50% earned income and 10% contributions”<sup>103</sup> (Figure 27). While this is long-standing, this business model is wholly unsustainable.

In Wales, while Thurley Review’s recommendation for a three-year funding cycle for Amgueddfa Cymru has been accepted, funding is frozen until 2020 for Amgueddfa Cymru, Arts Council of Wales and Cadw.

*“Then that the Welsh Government and Amgueddfa Cymru develop a shared 10 year vision for Amgueddfa Cymru with a five-year focus and three-year funding agreement.”<sup>104</sup>*

The Arts Council of Wales Visual Arts Portfolio organisations are on a two-year funding cycle, interlinked to the Welsh annual budget allocation from central government. As a result there was broad consensus that portfolio organisations are

‘caught in a short-termism trap’, unable to plan long-term.

Local Authorities, despite budget cuts arising from austerity, continue to be amongst the most significant supporters of arts and culture in Wales, through direct funding of galleries, museums, libraries and performance venues across the country, and through grants and in-kind help to independent arts organisations. Through their role in education, public health, economic development, poverty reduction, planning regulation and their understanding of local needs and opportunities,<sup>105</sup> they have a vital role to play in realising the potential of creative citizenship in Wales.

Heritage Lottery Fund (HLF) has announced a series of funding changes for the 2018/19 financial year, including a tightened budget and decreasing grant amounts, which will affect organisations seeking heritage funding. HLF is currently planning its strategic funding framework for 2019-2024, as it adapts to a reduction in National Lottery income. This includes consultations on simplifying grant programmes, introducing non-grant finance initiatives such as loans, and democratising

<sup>103</sup> The most recent ADUK/ACW survey (2015) stated that the Arts contribute to public service outcomes, with 96% of respondents stating that their arts services contribute to health and wellbeing outcomes; 86% stated that they contribute to stronger and safer communities; 75% contributing to equality and exclusion, and 75% contributing to education and child services

grant-making decision process. HLF have stressed that any new strategic funding will support innovation and new ways of working and is likely to have a strong focus on urban parks and landscapes.

The Lottery Capital Programme for major projects (including public art initiatives), administered by Arts Council of Wales, closed in 2017. Oriel Davies and Oriel Myrddin in Carmarthen had modest expansions planned, which had been underpinned by Arts Council of Wales capital resource through the Lottery. However these were cancelled at the Fund’s closure.

Faced with these funding cuts, along with other challenges to cultural institutions across the UK indicates that the underlying business model of the subsidised sector in Wales is precarious at best. These findings are corroborated by the National Assembly Wales’ Building Resilience: Inquiry into non-public funding of the arts (March 2018) and The Thurley Review of Amgueddfa Cymru – National Museum Wales (2017), both published in the course of this study and the Expert Review of Local Museum Provision in Wales (2015). These studies stress the serious lack of expertise in fundraising, marketing and earned income, the lack of staff capacity and resource,

falling visitor numbers,<sup>106</sup> and the limited private, corporate and public funding pool, all of which are required to enable a healthy diversified funding model for individual arts organisations.<sup>107</sup>

<sup>104</sup> Nesta, The New Art of Finance, Making Money Work Harder for the Arts (July 2014)

<sup>105</sup> Dr Simon Thurley CBE, Review of Amgueddfa Cymru – National Museum Wales (Welsh Government, June 2017)

<sup>106</sup> Martin Bailey, Is the UK museum boom over? (The Art Newspaper, 26 Mar 2014)

<sup>107</sup> National Assembly for Wales Culture, Welsh Language and Communications Committee, Building Resilience: Inquiry into non-public funding of the arts (Mar 2018); Dr Simon Thurley CBE, Review of Amgueddfa Cymru – National Museum Wales (Welsh Government, June 2017); and Dr Haydn E Edwards, Expert Review of Local Museum Provision in Wales (2015)

# Key Contexts

## Contributed Income

Consultations with curators and directors highlighted primary concerns regarding non-public funding:

*“The size of organisations in Wales means it is difficult to access funding. This is made worse if we are located away from the cities. London gets the majority of private sector funding, with little reaching the regions.”*

**Gallery Director**

*“We do not have a lot of high net worth figures or big companies based in Wales. While there is a Welsh diaspora, it isn’t like the Irish diaspora.”*

*“Foundations in Europe have reduced the amount of grant giving.”*

**Gallery Director**

*“Some UK based trusts and foundations don’t promote themselves in Wales.”*

**Gallery Director**

Interviewees also stated that *“there is huge competition for funding from core foundations and trusts”* such as the Paul Hamlyn Foundation, Foyle Foundation, Clore Duffield and Esmée Fairbairn Foundation, but there is a *“lack of capacity and know-how in writing grant applications.”*

**Gallery Director**

It was also emphasised that curators want to prioritise curatorial, R&D and

programming activities over grant-making, which was *“pulling them away from the jobs”*.

These constraints are echoed in the Building Resilience: Inquiry into non-public funding of the arts (March 2018) and Garfield Weston Foundation’s An Insight into the Future of Charity Funding in Wales published in partnership with Centre for Charitable Giving and Cass Business School (2015).

It was stated in the Visual Arts Galleries Wales (VAGW) workshop that the Resilience programme has made a noticeable difference to a number of organisations,

*“it has made us consider what we are about... it has made us think about what we want to prioritise”*

**Gallery Director**

but it was also highlighted that there is a desire and requirement for further investment in capacity building and organisational development, and that this is a priority for almost all of the organisations interviewed. While many organisations are entrepreneurial and ambitious, a gear shift at organisational level to meet these ambitions cannot currently happen.

Entrepreneurship, funding of experimental and innovative projects and opportunities to reach broader audiences cannot be fully

realised due to these constraints.

*“There is significant competition for funds nationally, and core arts foundations (Paul Hamlyn Foundation, Foyle Foundation, Clore Duffield, The Esmée Fairbairn Foundation) the UK are centred on London.”*

**Gallery Director**

While donations and sponsorship from businesses have been harder to secure as a result of CSR funds being reduced<sup>108</sup> there is potential to explore whether marketing budgets, which are often significantly higher, can be accessed. These require a commercial rather than a philanthropic benefit to the companies, which raise issues of expertise and capacity for most arts organisations.

There are approximately 116 FTE volunteers across the ten organisations comprising the Arts Council Visual Arts Portfolio, as well as paid staff that provide *“voluntary hours and in kind working.”*

**Gallery Director**

Some interviewed suggest that this contribution is challenging to put a value on (on top of FTE hours) and often goes unrecognised.

Very few stakeholders interviewed highlighted the role of their Boards in contributing to fundraising efforts. This is a clear opportunity for the sector, as emphasised in the Garfield Weston Study, *“Although 75% of organisations said their Board was involved in fundraising, many Trustees are not engaged at a strategic level and most organisations said that income generation was led by opportunity. Building Board level fundraising expertise and recruiting on a skills-basis may help organisations to move forward in seeking alternative sources of income in a strategic way.”*

## Earned Income

Given the funding cuts, Arts Council of Wales is encouraging organisations to reduce their reliance on public subsidy and increase their earned income. Larger mixed-use organisations like Chapter Arts Centre have been able to achieve 59% earned income of total income (2016/17) through ticket sales, hires and rentals, retail and F&B trading.<sup>109</sup> However, there are a number of organisations in Wales that are not scaled sufficiently – in terms of space, staffing or annual turnover – to generate significant income.

<sup>108</sup> Chapter Arts Centre, National Assembly for Wales, The Culture, Welsh Language and Communications Committee, Non-public Funding of the Arts, CWLC(5) ART07 Evidence from Chapter (2018)

<sup>109</sup> Chapter Arts Centre, National Assembly for Wales, The Culture, Welsh Language and Communications Committee, Non-public Funding of the Arts, CWLC(5) ART07 Evidence from Chapter (2018)

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Many expressed concern about the push for increasing earned income. Many of those interviewed highlighted their ambitions to be “*more commercially savvy*” but some highlighted that “*a lack of time, capacity and knowledge*” in relation to how this might be addressed. This was also emphasised in An Insight into the Future of Charity Funding in Wales, more broadly focused on charities – “*bigger organisations are coping better with the changing funding context, while many small-medium charities have taken few tangible steps towards shifting from traditional public support to new ways of working; they need to become more pro-active and engaged in identifying and seeking help with growth and development needs.*”

## A New Entrant

It was unanimously agreed among consultees that any new national contemporary art entity should bolster the nation’s existing visual arts infrastructure, which Wales has methodically invested in over the past ten years:

*“It would be extremely exciting to try to deliver a national contemporary art gallery for arts. A genuinely important addition to the landscape here. We feel extremely positive about trying to make it happen.”*

Arts Leader

However, consultations revealed a sector-wide concern that any new national entrant, requiring both major capital and ongoing revenue support, will at best destabilise and at worst destroy the existing publicly funded ecology and competition for limited private funds, as highlighted above.

*“At this point it is about damage limitation.”*  
Arts Centre Director

*“Essentially we suspect, in this current financial climate with public funding for existing venues and institutions decreasing and competition for external funding opportunities increasing dramatically while funds available decreasing, that the sector will feel it is an unsustainable development if it is a standalone venue and does not recognise the value and contribution of existing collections and venues.”* Museum Director

One Museum Director in London stated:

*“I’m also concerned, reading Mendoza’s paper [England’s Museums Review<sup>110</sup>]. I’m really worried about resilience – and the dependence on corporate support. I don’t think this [new National Gallery] should be just another engine to fundraise for ... Within the context of Brexit this is a real serious concern.”*

110 Neil Mendoza, Department of Culture, Media and Sport, The Mendoza Review: an independent review of museums in England (14 Nov 2017)



## Business Model Implications and Opportunity

1. A focus on capital fundraising and delivery must not overshadow the development of an operating fundraising feasibility study and a realistic operating model and risk register.
2. The income model for a new national entity of contemporary art must be defined by revenue opportunities that benefit, rather than take away from, the wider sector – for example through partnership bids, shared fundraising expertise, a shared resource pool and donor cultivation strategies, or distributed programming.
3. There is an opportunity for a national entity of contemporary art to serve as a leader in helping the sector reconfigure its business model, for example, by providing direct access to expert staff working at national level. *“Given that larger organisations are more likely to be attractive to potential investors and are more likely to have access to the skills and resources required to secure funding.”*<sup>111</sup>
4. The currently unstable ‘tripod economy’, coupled with co-opetition between Welsh arts organisations, and the unaligned planning and funding cycles, means that there is a necessity to explore other sources of income beyond the traditional categories. This could include crowdfunding, venture philanthropy, patient capital, loan agreements, R&D or new financing models taken in social finance. As highlighted in Nesta’s paper, The New Art of Finance this has created a more sustainable approach.<sup>112</sup>
5. The new National Contemporary Art Gallery Wales has the opportunity to prioritise investment in R&D and there should be some incentivisation to do so, as in other sectors. The potential payoffs, particularly in terms of building audiences – and therefore micro-funders – can be significant.

111 National Assembly for Wales, Culture, Welsh Language and Communications Committee, Building Resilience Inquiry into non-public funding of the arts (Mar 2018)

112 Nesta, The New Art of Finance, Making Money Work Harder for the Arts, (July 2014)

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## The Social Case for Investment

*"To say to people who are fighting for jobs [that] art and contemporary art are important, is a brave decision and a necessary one."* Roger Maggs, Chair of Port Talbot Waterfront Enterprise Zone

The growth of 'Impact Investment', allying financial return with the intention to generate positive social or environmental change, currently accounts for at least £150bn of committed capital in impact investments in the UK alone.<sup>113</sup> This is underscored by the existence of a diverse ecosystem of specialist intermediaries in impact investment.<sup>114</sup> The UK Department for Culture, Media and Sport has identified significant latent capital from both retail and institutional investors currently readily available to support future growth and the UK National Advisory Board has quantified this, suggesting that over the next decade in the region of £300bn could be channelled into Impact Investments that are helping to directly address critical social and environmental challenges.<sup>115</sup>

Building upon the Social Impact Investment Taskforce, established under the UK's presidency of the G8, the GSG independent Global Steering Group was set up in 2015 to catalyse impact investment and entrepreneurship to benefit people and the planet. The GSG currently has 15 member countries plus the EU and brings together leaders from the worlds of finance, business and philanthropy.

Yet, despite this emerging global movement, the vast majority of such investments are to date geared toward exposing socially-minded business (i.e. social enterprises) to financial markets and investors. The British Council's Director of Social and Creative Economies, Mairi MacKay suggests that arts organisations have not joined with social enterprises to actively cultivate these markets, networks and leaders at a strategic level – *"the Social Enterprise sector has not until recently ensured that creative enterprises and creative processes are at the core of the argument for social change. There is a much more integrated way of thinking about this agenda that includes social and creative enterprise working together to unlock a radical new system, an inclusive and creative economy."*

Nesta's report, The New Art of Finance, further emphasises this opportunity *"Arts organisations could benefit from engaging investors who want to combine financial, social and artistic impact."*<sup>116 117</sup>

Impact Investment offers financial exposure to socially-minded businesses, while quantifying and qualifying the instrumental and intrinsic impact of the arts is an age-old dialogue, it is clear that the Welsh arts sector, at least, has not to date strategically positioned itself within the Impact Investment space explicitly, despite carrying out socially valuable activities.

To do so requires the rejection of familiar questions about the distinction between intrinsic and economic and wider instrumental 'justifications' of culture and concerns about how to measure such longitudinal, amorphous impact.



## The Social Case for Investment Implications and Opportunity

1. There is an opportunity to 'leapfrog' the dialogue exploring the distinction between the intrinsic and instrumental value of art, and instead build a programme designed to inspire and empower the creative citizen. Discussions about the value need to be reframed, and there is at this moment a marked opportunity for Wales to recalibrate how it can best embed creativity at the heart of solutions to society's most entrenched challenges.
2. The Welsh cultural sector could explore how to capitalise on the growing headwind behind Impact Investment as it considers its own funding model, and the social challenges it wishes to tackle in new, creative ways in the years and decades to come.

<sup>113</sup> HM Treasury, Tracey Crouch MP, and Stephen Barclay MP, Growing a Culture of Social Impact Investing in the UK (Government Department of Culture, Media and Sport, Nov 2017)

<sup>114</sup> Ibid

<sup>115</sup> UK National Advisory Board on Impact Investing, The Rise of Impact: Five steps towards an inclusive and sustainable economy, (Oct 2017)

<sup>116</sup> Nesta, The New Art of Finance, Making Money Work Harder for the Arts (July 2014)

<sup>117</sup> British Council's recently launch of the Developing Inclusive and Creative Economies (DICE) Programme is focusing on those enterprises working at the intersection of social and creative enterprise to address some of society's most entrenched challenges including gender inequality and youth unemployment. This is a nascent sub-sector that is designed in part to attract new forms of private investment



# Key Contexts

## Health and Well-being Agenda

The publication of the Oxford University Press Public Health Textbook on Creative Arts, Health and Wellbeing<sup>118</sup> in 2016 and the All-Party Parliamentary Group on Arts, Health and Wellbeing Inquiry Report Creative Health: The Arts for Health and Wellbeing<sup>119</sup> in 2017 reflects the fact that this domain is now recognised globally as a priority area for both the arts and for public health. For public health, this is because there is a recognition that great and growing issues of our time are no longer clean water and infectious diseases, but social inequalities in health, obesity and psychosocial issues associated with loss of meaning, loneliness and isolation, particularly but by no means exclusively amongst the elderly. This requires a more holistic approach to societal health and wellbeing, with a focus on systems and social networks, promoting activities which enhance both individual resilience and good relationships, trust, cooperation, mutual awareness and acceptance.<sup>120</sup>

There is now good evidence for the positive

impact of arts participation on health ranging from formal art therapy, to artists working in health contexts, to arts as a therapeutic support for people with a cancer diagnosis or with long term conditions such as dementia. There is also a growing body of evidence that cultural attendance without taking part in activities i.e. simply visiting a museum or art gallery or going to a live concert – has such an impact on health and wellbeing that regular attenders live longer than non-attenders.<sup>121</sup> This work, carried out by epidemiologists, suggests that this effect is not the result of healthy people being more culturally active or of the social or physical side effects, but of the enriching emotional and meaningful engagement with culture. Studies have shown, for example, that this effect disappears when cultural attendance stops and resumes if attendance starts again.<sup>122</sup> The recommendations in this report are designed to promote cultural activity and attendance throughout the life-course.

In the course of this study, 27 National Health Service (NHS) organisations across North West England (Cheshire and Merseyside) announced their commitment

to developing a social prescription plan. The plan will initially focus on new and expectant mothers, using arts and health partnerships to give children the “best start” in life, and is hoped to form the basis for general social prescribing for all stages of life across the whole country.

Wales has already recognised, in the Jay Report the importance of reducing cultural inequalities, and the role of the arts in creating a more just society. Maximising the health impact of the the arts by delivering tangible, dynamic programmes as part of the National Contemporary Art Gallery Wales’ portfolio would make a significant contribution to achieving these goals.

## Education, Creativity and Citizenship

According to the 2016 AHRC funded study into the Value of the Arts, ‘Arts in education has been shown to contribute in important ways to the factors that underpin learning, such as cognitive abilities, confidence, motivation, problem-solving and communication skills. This has already been recognised by the Welsh government, through the launch in March 2015 of the the Creative Learning Through the Arts programme, in a partnership with Arts Council of Wales, supported by equal investments of Arts Lottery and Welsh Government Department for Education and Skills funding, totalling £20m over five

years. Initial evaluation is very positive and clearly this programme has considerable potential.<sup>123</sup>

More widely, the AHRC study found that there is a strong case that engagement with the arts helps foster reflective individuals and engaged citizens and supports members of minority ethnic groups in exploring and expressing their identities. The recommendations in this report are based on a vision of the arts playing an inspirational role at every stage of people’s lives, building on the existing infrastructure and major programmes like Creative Learning through the Arts. Combined with the widely acknowledged need for future workers to be more adaptable and the specific opportunities in the creative economy, these all add up to a strong case for the arts being at the centre of Welsh Government policy.

118 Stephen Clift and Paul Marc Camic, Oxford Textbook Of Creative Arts, Health, And Wellbeing (Oxford, Oxford University Press, 2016)

119 All-Party Parliamentary Group on Arts, Creative Health: The Arts for Health and Wellbeing, Health and Wellbeing Inquiry Report (July 2017)

120 Phil Hanlon and Sandra Carlisle, The Fifth Wave Of Public Health And The Contribution Of Culture And The Arts, Oxford Textbook Of Creative Arts, Health and Wellbeing (Oxford, Oxford University Press, 2016) 19-26

121 Mark O’Neill, Cultural Attendance And Mental Health - From Theory To Practice, Journal Of Public Mental Health 9 (2011) 22-29

122 SE Johansson, BB Konlaan, and LO Bygren, Sustaining Habits Of Attending Cultural Events And Maintenance Of Health: A Longitudinal Study. Health Promotion International 16 (2017) 229-234

123 Evaluation of the Creative Learning through the Arts programme, Wavehill (Mar 2018)

# Sector Ambition

## The Language of 'Barriers and Challenges'

The consultees' language was notable for regularly emphasising the barriers and challenges to delivering an ambitious new national entity. Perceived and real access issues around Wales were identified as key barrier with almost all consultees.

*"The biggest barrier is Wales' geography and topography. It divides the country."*

**Gallery Director**

It was recognised that there are disparate regions and regional communities in Wales, and while this is a challenge, it could be addressed positively.

*"[In Wales we need to think about the] dynamics not the deprivation."*

**Arts Organisation Director**

Other consultees suggested that there was an anxiety around change, given the small pool of professionals that have been working in the sector and the nature of the funding model and reliance of public subsidy in Wales.

*"Any initiative like this will be perceived as a threat. Challenges of new organisations to existing and senior people in their roles; it's a threat to their jobs."*

**Gallery Director**

However, it is not only the sector that lacks confidence around the visual arts. The press has played a role in exacerbating the 'challenge' narrative. This goes back as far as 2000, but is a narrative continued today, and a large number of consultees highlighted that the CVA was doomed to fail:

*"When city authorities – and in the case of Cardiff, national governments – try to regenerate a city by mixing up architectural, artistic and leisure projects, the results can be catastrophic. Sheffield ends up with a National Centre for Popular Music (aka the Unpopular Centre for National Music) whose shiny Nigel Coates design cannot conceal the poverty of its displays; Newcastle gets a vast, pointless life-science centre; Greenwich gets the Dome. What these follies have in common is a patronising conception of popular culture."* **(On the CVA)**

*"With hindsight, the Centre for Visual Art was never going to make it here."*<sup>124</sup>

*"Once again (and perhaps uniquely in Europe), Wales finds itself a nation without a readily accessible book that describes its visual culture to its own people and to the world."*<sup>125</sup> **Peter Lord**

Moreover, the successes of the sport, performance and music sectors are glorified and often used in comparison to the visual arts.

*"When James Richards was shortlisted for the Turner Prize – there was no pride in this; or when Cerith Wyn Evans showed at Tate, the Welsh Assembly should have been making sure this was hugely visible to the Welsh public! If it had been Michael Sheen or someone singing in Times Square it would have been all over the press. There is no sophisticated interest in the visual arts."*

**Artist**

*"Artists are mediating other Welsh obsessions. It is never art for itself. It is always 'art sauce' over a subject like coal-mining. They don't have confidence in their welsh artists."* **Artist**

<sup>124</sup> Jonathan Jones, The Regeneration Game (The Guardian, 16 Oct 2000)

<sup>125</sup> Peter Lord, The Tradition: A New History of Welsh Art, 1400-1990 (2016)



### **The Language of 'Barriers and Challenges'**

#### **Implications and Opportunity**

1. The lack of direct and effective public transport systems between parts of Wales can cause challenges, particularly for those that do not have access to a private motor car; yet the 'pilgrimage to art' can become an experience unto itself, with the landscape as an integral part of the journey. Particularly in a time where access to universal, globalised digital culture is available at any time from anywhere, Wales' geographic barriers could be positioned as an unparalleled asset. Wales can offer something that is not accessible anywhere else in the world.
2. Romanticism aside, the barriers to accessing transport are real. Any 'national' entity must be truly national, enabling those to access their nation's culture and collections with relative ease - rather than at the expense of time and money. Consideration should be given to positioning the arts along the Wales Ways and other primary, well-used routes between communities, as well as providing access to the arts alongside other popular attractions across the country.
3. There is a requirement to build confidence in the visual arts sector around what has been achieved so far and to fully utilise key successes in the visual arts.

# Sector Ambition

## Consulting fatigue

*“What a drastically bad decision those Welsh guys made. I mean, really stupid. They had this fabulous architect with this fantastic design and they blew it, they just completely blew it. And one could boycott Wales forever really just on that basis. Why not?”* Piers Gough, Architect

Reverberations from decades-old latent attempts to build a national arts organisation, including a contemporary art gallery, remain in the discourse. Many consultees consider any new national gallery as ‘high risk’ and most had questions about who the ultimate decision maker would be for determining if and how recommendations are pursued.

Wales passed up the opportunity in 1995 to realise Zaha Hadid’s winning design for a new home for the Welsh National Opera in Cardiff Bay– a design that many consulted agree would have whetted the seemingly insatiable appetite for spectacular, thoughtful architecture housing world-class art. The design, with capital costs estimated at between £45-60m in 1995, was eventually used to build the critically-acclaimed Guangzhou Opera House in China (2010). Today the Guangzhou Opera House has “been credited with transforming a Chinese city with a population more than four times the size of Wales into a cultural capital.” The

complexity of the decision by the international committee in Wales has been explored in a number of papers and reflected on regularly by Hadid herself before her untimely death.<sup>126</sup>

The 2008 ABL report was the last of many reports making the case for a centre for contemporary art in Wales, including discussions from as far back as 1986 leading to the 1992 feasibility study.<sup>127</sup> That study resulted in the opening of the Cardiff Centre for Visual Arts (CVA) in 1999. The CVA’s closure two years later in 2001 was the subject of a review by the National Audit Office Wales.<sup>128</sup> The Guardian covered the closure, further emphasizing the failure, and its root causes, “With hindsight, the Centre for Visual Art was never going to make it here... Cardiff’s political establishment went about the business of establishing the Centre so half-heartedly that it’s hard to believe they

126 Nicholas Crickhowell, *Opera House Lottery: Zaha Hadid and the Cardiff Bay Project* (1997). Award-winning business woman Zaha Hadid hits out at ‘prejudice’ over doomed Cardiff Bay Opera House project (Wales Online, Paul Rowland, 2013, Hugh Pearmen, The Sunday Times Architecture Critic appearing in Documentary from Alan Yentob (Imagine, BBC) about Zaha Hadid. Opera house design winner rebuffed (The Independent, Jonathan Glancey, 1995; Albenia Yaneva, *Mapping Controversies in Architecture* (Routledge Publishing, 2016)

127 David Pratley, *The Review of Art Galleries and Permanent Exhibition Spaces in Wales* (2001) found that expenditure per capita on running visual arts exhibition spaces in Wales was 30% less than expenditure in England and 42% less than expenditure in Scotland; David Clarke Associates and Peter Jenkinson OBE, *The Display of Art in Wales* (Jan 2006)

128 Arts Council of Wales: *Centre for Visual Arts - Report by the National Audit Office Wales on behalf of the Auditor General for Wales*

wanted a modern art gallery at all. Instead of nurturing an audience for new art, the CVA acted as a proof to cultural conservatives that Welsh people don’t want this modern art rubbish, see.”<sup>129</sup>

The CVA’s closure was followed by three subsequent studies evidencing the need for a national centre of contemporary arts before the ABL report was published. Discussion about a world-class visual arts venue reopened in 2013 about whether Wales might be a viable locale for the next Guggenheim franchise.<sup>130</sup> While this partnership was ultimately not realised, the debate about its potential, and the ambition for the sector still lingers in the discourse.

Moreover, there has been a series of recent publications which have required cultural professionals to contribute extensive and considered input. These include Arts Council of Wales’ Investment Review(s) (2011, 2016), and the Building Resilience: Inquiry into non-public funding of the arts (2018), among others.

Not surprisingly a large proportion of stakeholders are experiencing consultation fatigue, having explored the potential for a national gallery of contemporary art extensively in the past. Given many have

been consulted on a number of national reviews, and have witnessed the failure of many of the recommendations to materialise,<sup>131</sup> many are concerned that this will ultimately be an academic exercise.

*“The appetite amongst the artists community and art lovers is a big one. We’ve been asking for this a long time. There have been feasibility studies before. Is it just another feasibility study that won’t lead to anything?”* Artist

*“I think the feasibility study has opened up the feeling of possibility – there are so many stakeholders, opinions, feelings of entitlement. What could it be? What should it be? That’s only going to be heightened because of CVA.”* University Partner

131 For example, the Pratley (2001) report stated, “Key weaknesses identified were the inability to tour exhibitions effectively because of a lack of spaces and lack of capacity and skill to improve visitor numbers” the latter of which is an issue still being cited 17 years later

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## Sector Ambition



### **Sector Ambition**

#### **Implications and Opportunity**

1. Despite the reservations, however, across the study there emerged a powerful and widely-felt ambition and enthusiasm to trail-blaze a new model for the display of contemporary art in Wales that bolsters the existing ecology and ensures Welsh art takes its rightful place on the global canvas.
2. The majority agreed that Wales has a remarkable opportunity, if not an imperative, to nurture creativity and embed world-class, relevant contemporary art into the lives of the Welsh people.



Opposite:  
S Mark Gubb, Revelations: The Poison of  
Free Thought Part II, commissioned by g39.  
Source: g39

## Purpose and Vision



# Purpose and Vision

*“Failure to engage [with culture] has consequences for the economy as well as for the individual, particularly in the context of the creative and communication industries as the great powerhouses of the future economy. It is not simply about life-enrichment; by not engaging with what cultural knowledge and activity can provide, people and communities lose out in terms of rights, jobs and citizenship. Wales loses social capital and it cannot afford to do so.”*

**Culture and Poverty: Harnessing the power of the arts, culture and heritage to promote social justice in Wales, Baroness Kay Andrews OBE, March 2015**

## Purpose

Across the world, a large majority of national galleries state that their primary purpose is ‘to display and care for the nation’s collections’ (Appendix 7). Our research has shown the mission and vision statements of these national galleries are focused on their functions: preservation, care, scholarship, collecting and display. There is a notable lack of mention of the role and value of art to society, of audiences, social engagement, access, equality, or its role as a catalyst for creativity and/or innovation.

While the function of any new national gallery for Wales is to collect and preserve collections for future generations, given Wales’ history and the Welsh Government’s

focus on taking action and ensuring equal opportunities and access to the arts, a new national contemporary art gallery has the potential to take a different avenue and focus on its people, its artists and its sense of place.

As one political leader stated the National Contemporary Art Gallery Wales is in prime position to add value to the Welsh people’s lives:

*“While there is an argument to build a school or hospital, it is bread and roses.<sup>132</sup> For many, the visual arts is the most accessible form of encountering culture... it’s about cultural empowerment”*

The Welsh Assembly’s recent publications about arts and culture paint a stark picture of the societal implications of denying cultural access. Culture and Poverty: Harnessing the power of the arts, culture and heritage to promote social justice in Wales (Baroness Andrews, 2014) states:

*“A quarter of the population of Wales lives in circumstances which are so disadvantaged that they are among the very worst in the UK; persistent, inter-generational unemployment, high levels of chronic illness,*

*low wages and low skills have all intensified social and cultural exclusion.”*

This is echoed in An independent report for the Welsh Government into Arts in Education in the Schools of Wales echoed in An independent report for the Welsh Government into Arts in Education in the Schools of Wales

*“The tragedy is that these communities are not only losing out economically; economic and social exclusion means cultural exclusion as well. The things that enrich our lives and bring such pleasure – whether that is the visit to the theatre, cinema, or gallery or cinema remain out of reach to many.”<sup>133</sup>*

**Professor Dai Smith, 2013**

As the conclusions of Dai Smith’s report and The Young Foundation’s Valuing Place Report make clear, providing access to cultural experiences and co-developing policy with communities is critical to addressing issues of rising inequality and creating new solutions to society’s most entrenched challenges.

<sup>132</sup> “Bread and Roses” is a political slogan that originated from a speech given by Rose Schneiderman; a line in that speech (“The worker must have bread, but she must have roses, too.”). Bread represented a living wage; roses referred to workers’ desire for dignity of life and respect.

<sup>133</sup> Baroness Kay Andrews OBE, Culture and Poverty: Harnessing the power of the arts, culture and heritage to promote social justice in Wales, (March 2015) 8

## Purpose and Vision



Figure 28: Word cloud showing frequency of words within visions and missions of a selection of national art galleries across the world  
Source: Event, 2017



# Purpose and Vision

## Towards a Vision

It would be pre-emptive to put forward a crystallised vision. However, the ambition is that:

***The National Contemporary Art Gallery Wales will spark and nurture creativity and embed world-class, relevant, imaginative contemporary art into the daily lives, landscape, work and lexicon of Welsh citizens today and for generations to come.***

It is crucial that the future executive leadership build and own a deliverable strategy, vision and set of values. Moreover, the future strategy must be built in collaboration within communities and with the up and coming generation at the table. That said, the Steering Committee agreed several key priorities that should form the backbone of the new entity. It is assumed that all of the proposed options (Appendix 6) would be positioned to deliver these priorities.

## Leadership

- Develop shared ambition for nurturing creative citizens in Wales through a national contemporary art gallery;
- Drive thought-leadership in collaborative working, socially-engaged creative practice and inclusive and creative economic development;
- Build on Wales' strong legacy of

creativity;

- Broker authentic intersectoral relationships;
- Nurture the next generation of cultural leaders and professionals;
- Nurture the next generation of investors, board members, patrons and partners;
- Play a strategic and unifying role across and outside of Wales;
- Mobilize support and ensure that the Gallery is pivotal in local, regional, and national conversations.

## Identity and positioning

- Position Wales and the best of Welsh art on the national and global stage;
- Drive excellence in the Welsh visual and applied arts by presenting, discovering, developing and discussing talent;
- Drive thought-leadership in contemporary art;
- Provide a platform for collaborative, socially-engaged practice;
- Be authentic to Wales;
- Provide a platform for imaginative, singular experiences that reflect the culture, society and landscape of Wales.

## Content and collections

- Provide artists and creative communities a platform on which to experiment and create;
- Introduce and continue a current dialogue on contemporary art, artistic practice and curatorial practice locally

and internationally;

- Use modern visual and applied arts in combination with contemporary artworks to frame, develop conversations and debate about contemporary arts;
- Enable greater democratic access to the national collections across Wales and increase the number of artworks displayed;
- Collect, commission and co-commission artworks from emerging, mid-career and established living artists.

## Engagement and education

- Roll out a clear and ambitious education and engagement philosophy that goes beyond the traditional models and becomes more integrated with local community educators as seen at the National Theatre Wales;
- Develop a communication strategy for the visual arts sector, audiences and stakeholders;
- The educational philosophy and approach will be consistent and ambitious across all models – a combination of onsite formal and informal learning, and crucially a programme of 'outreach/inreach', working directly with communities outside a physical building and co-developing programming;
- This could include using artists, other creatives and community members as mediators or ambassadors.

## Support functions

- Build realistic and pragmatic marketing and fundraising costs into core operational expenditure and strategy at the earliest stages;
- Undertake rigorous evaluation and evidence impact, setting up systems for evaluation at the outset and designated clear points in a five year period in which to assess the development of the preferred model.

## Talent recruitment

- Ensure recruitment for curatorial, education and marketing teams focuses on identifying collaborative individuals that understand how to sensitively and creatively connect with a wide-range of communities.



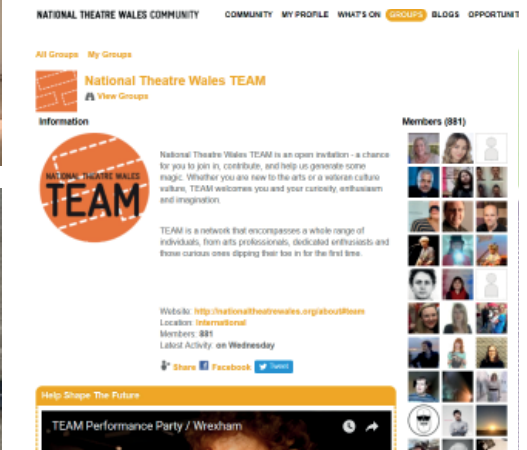
# Purpose and Vision



Platform for artistic experimentation, Palais de Tokyo, Paris  
Source: Event, December 2017



Community workshop, with guest curator Mike Tooby Turner Contemporary, Margate  
Co-curated exhibition, Turner Contemporary, Margate  
Community-led pop-up exhibitions across Margate  
Source: Event, 2017



Art Everywhere collaborative project to display 57 British works of art across the UK for two weeks. No.1, Victoria Road, Rhymney, Caerphilly. Head VI, 1949, by Francis Bacon. Arts Council Collection  
Source: Robin Drayton, 2013  
National Theatre Wales, TEAM network group of collaborators  
Source: National Theatre Wales



# The Options



# The Options

“If there is to be a future for Wales – and I think there’s a huge future for Wales – I’d like to see some slightly more progressive thinking, rather than aping something that has already happened in Europe, the United States and in England.” “Of course, you could make an interesting new building in Aberystwyth or somewhere, and why not? You’d have to be out of your mind to be against it. I just think it’s a conventional, old fashioned way of thinking and I’d rather see a different sort of investment in a new future for Wales.” **Stephen Bayley, Cultural Critic**

## Options Development and Assessment

The options analysis provides an ordered but flexible approach to decision making. The process is defined by a weighted, multi- criteria analysis, and allows the benefits, implications and risks of the options we have identified to be evaluated alongside one another. Unlike financial criteria, which are often seen to be objective, this analysis integrates quantitative and qualitative assessment, dependent on the judgement of those undertaking the scoring exercise in this case, an independent review.

The criteria and weighting were built upon the findings presented in the previous chapter, as well as the values and priorities emerging from conversations with stakeholders and key documentation.

The detailed criteria are presented here:

## Profile

- Bolster the visibility of the existing cultural infrastructure in Wales;
- Differentiate Wales (but not for differentiation’s sake).

## Fit with vision/values of key stakeholders

- Welsh Government / Well-being of Future Generations;
- Arts Council of Wales;
- Amgueddfa Cymru;
- Visual Arts Galleries Wales (VAGW) and the broader cultural community;
- Local Government;
- Public Health.

## Audience Access

- Provide ease of access to the contemporary visual arts experience for:
- Disadvantaged communities;
  - Welsh language speaking communities;
  - Welsh rural communities;
  - Welsh urban communities;
  - National tourists;

- International tourists;
- Cross border communities.

Provide ease of access to the national collections for:

- Disadvantaged communities;
- Welsh language speaking communities;
- Welsh rural communities;
- Welsh urban communities;
- National tourists;
- International tourists;
- Cross border communities.

## Interpretation and Display

Enable the display of contemporary art:

- Within an art historical context;
- Amongst multi-disciplinary collections;
- In the landscape;
- In non-traditional venues;
- Alongside / in dialogue with other art forms.

## Strength of Partnerships

Allow for strong partnerships with:

- Primary / Secondary Education sector;

- Higher Education, including Art Schools;
- Artists;
- Visual arts sector;
- Wider cultural sector;
- Non-arts based practice e.g. science;
- Commercial sector;
- Visit Wales;
- Local authorities;
- Private developers;
- Investors and philanthropists.

## Financial viability

- Have a positive effect on the funding of the existing arts ecosystem.

## Capital

Demonstrate potential for:

- Attracting public support (HLF, ACW, Local Authority, Welsh Government);
- Attracting commercial investment;
- Attracting private (i.e. foundation/ individual) support;
- Maximising existing cultural assets in Wales.

# The Options

## Operating costs

Demonstrate potential for:

- Maximising existing cultural assets in Wales;
- Attracting public support or limiting subsidised on-going revenue costs;
- Attracting commercial investment;
- Attracting private (i.e. foundation and individual investor) support;
- Maximising earned income opportunities;
- Easing resource challenges;
- Unlocking new funding streams;
- Leveraging the collaborative economy;
- Necessitating higher running costs for collections distribution.

## Political Sensitivity and Support

Seem likely to receive:

- Political support;
- Visual arts sector support;
- Support from existing arts audiences;
- Support from marginalised existing and potential audiences.

## Market viability (Welsh economy)

Demonstrate potential for:

- Contributing to cultural tourism;
- Attracting residents;
- Attracting inward investment;
- Attracting commercial trade;
- Attracting art students;
- Attracting artists / contributing to cultural production (as well as consumption);
- Creating new employment opportunities.

## Timeframe

Align with other developments in market:

- Offer potential for short-term visible impact;
- Offer potential for long-term impact.

## Environmental Sustainability

Ensure the environmental footprint is low for:

- Transport options for visitors;
- Transport options for collection objects;
- Capital expenditure;
- Building running costs.

## Residual Risk After Mitigation

(Low score = more risk)

- Have the risk of instigating;
- Tarnished reputation for key stakeholders and Wales;
- Financial losses.

Twelve options were developed and designed iteratively with criteria above to meet the ambition to establish a high-profile, world-class, ambitious national entity of contemporary arts of and for Wales. These options built upon the findings presented to the Steering Committee in February 2018 and were developed in collaboration with a subset of the Steering Committee and representatives of Visual Arts Galleries Wales (VAGW).

These are summarised in the following pages. Detailed descriptions of the twelve models can be found in Appendix 6.



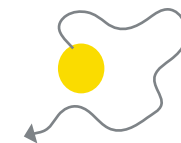
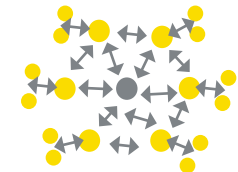
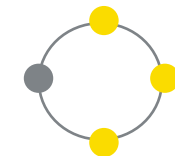
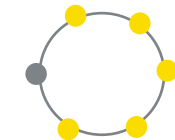
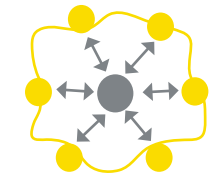
Options workshops with members of the visual arts sector in Cardiff, Wales. Attendees included representatives from the Amgueddfa Cymru, Arts Council of Wales and Visual Arts Galleries Wales (VAGW)

Source: Event, February, 201



# The Options Summary

Model	Description
Sharing Contemporary Arts Partnership	A refreshed model that revisits and builds on the successes and learnings from the Sharing Treasures Programme (2002-2014/15). It encourages co-curation and, through sufficient resource, ensures that visual art works from the national collection(s) are made available to a number of selected visual arts organisations across Wales.
Charm Bracelet	A select group of modern and contemporary visual art and design galleries (6-8 organisations) receive a semi-permanent extension to their physical site that is branded as the 'National Contemporary Art Gallery Wales.' A single curatorial programme threads its way through each of the associate sites. The galleries in the network would establish an equal partnership to work together to deliver a national body of work.
Visual Arts Family	A select group of modern and contemporary visual art and design galleries strategically align under one governing body. Each associate site is responsible for its own curatorial approach, but there is a collective approach. Each gallery will be branded as part of the National Contemporary Art Gallery Wales.
Network Members Club	Defined by thought-leadership and collaboration, this strategic network takes the form of a 'members club' for the visual arts sector. The network pro-actively seeks opportunities to enable and promote watershed moments in contemporary visual arts, and offers a robust and creative knowledge-exchange programme.
National Canvas	A land, country-wide focused national gallery comprising ambitious temporary, semi-permanent, or permanent artistic commissions and projects across Wales. The National Canvas would be defined by a vibrant commissioning model and would draw on the Wales Way, three tourist routes being promoted to domestic and international tourists.
Circus	A physical entity that tours the same exhibition from town to town, place to place across Wales. It annually or biannually can return to the same areas building a legacy year on year.



# The Options Summary

Model	Description
Extension	An extension to the National Museum Cardiff. It is designed to showcase modern and contemporary art and design works. The extension houses the permanent display of the national modern and contemporary art and design collection and provides temporary spaces for an experimental artistic programme and a series of welcoming social spaces.
Outpost in the Capital	A sister gallery to the National Museum Cardiff, this Contemporary Art Centre provides ample space for the display of ambitious contemporary art within Cardiff.
Outpost Outside the Capital	A sister gallery to the National Museum Cardiff, this Contemporary Art Centre provides ample space for the display of ambitious contemporary art outside of the capital.
Hive / Co-location	This is a vibrant mixed-used venue and creative hub, with multiple affiliates co-located on a single site. Affiliates have opportunities to collaborate and interact as much as work independently. It is a manifestation of the cultural supply-chain under one roof from training and production to cultural consumption and showcasing.
Merger	Two or more complementary and relatively equal organisations operating in the cultural and visual arts sector merge formally to jointly deliver a national entity of contemporary art.
Do nothing	The Amgueddfa Cymru and visual arts sector continue as usual with no investment in or further development of a national entity of contemporary arts at this time.



Figure 29: Longlist Options  
Source: Event, February 2018



# The Options

In addition to being interrelated, the models were also designed to be developed in sequence, building on one another.

For example:

- Developing the Sharing Contemporary Arts Partnership and then building an Extension to the National Museum Cardiff;
- Developing touring exhibitions (the Circus model) and then building an outpost outside the capital;
- Establishing a network members club for arts organisations within the visual arts sectors and then develop a set of extensions to existing galleries (the Charm Bracelet model).

For each model, Event has outlined the following detail, provided in Appendix 6:

- Model Description;
- Quotations from our consultations that support the model type;
- Capital Requirements;
- Operational Components;
- Partners;
- Timescale;
- Added Value to Wales;
- Strengths;
- Weaknesses;
- Risks and risk mitigation.
- 

Most significantly, the aim was to ensure that any new 'gallery' is of and for the people of Wales and will increase access to the nation's growing collection of contemporary art and design works.

Additionally, any new 'gallery' should raise the profile of the visual arts in Wales and provide a strong pull for cultural tourists. For that reason, and a series of additional operating constraints, Event did not include the late 20th-early 21st Century high-profile models of national museum design. These include The Overseas Partnership Model (British Museum/Sheikh Zayed) and The Franchise Model (Guggenheim).

Additionally, the Standalone Model (independent institution from Amgueddfa Cymru) is discounted as it would directly compete with the Amgueddfa Cymru family.

Tania Bruguera, Tatlin's Whisper #6 (2015).  
Site specific performance at National  
Museum Cardiff. Image courtesy the artist.  
Source: Getty Images



## Recommendations



# Recommendations

*"Landmarks...in the landscape contribute to sense of place by providing an icon to which symbolic meaning can be ascribed."*

**Frank Vanclay, 2008**

*"Put at its most brutal, the choice seems devastatingly plain. It is either to work to develop a fluid, broadening definition of art related to the mass media of today as well as to the aristocratic media of the past, or to accept the continued use of the narrow concept [of art] that will steadily become more remote from the key cultural questions of the technological age."* **Ken Baynes, The Art and Society Project of the Welsh Arts Council, 1973**

Rather than endorsing a single new building to house and display contemporary art in Wales, we recommend a world-first – a dynamic national model that combines a series of interlinked locations across the nation, heralded by a 'National Canvas' – a series of newly commissioned contemporary artworks embedded in communities across Wales. Together, these new and overlapping initiatives would be intended to galvanise artists, showcase Wales' unique environment, wrap communities into the artistic conversation, and show a bold and internationally eye-catching sustainable commitment to nurturing creativity through contemporary art practice and experiences.

The recommendations approach the idea of a 'national' gallery in a new way for a new century: devolving funding, sharing the nation's art across the nation, bolstering and connecting existing visual arts assets, and deploying the landscape itself as the medium and the canvas.

Recommendations are as follows:

## **Recommendation one**

Event recommends a progressive, evolving and scalable strategy that collectively is the National Contemporary Art Gallery Wales. The 'Gallery' comprises three interlinked phases (Figure 30) that together create new forms of beauty, cultural experiences and pilgrimage.

### **Phase one**

The Gallery will commission 50 temporary, semi-permanent or permanent new works to be installed across the five regions of Wales, co-developed by audiences, existing visual arts organisations, community organisations, curators and artists, and defined by 6-8 geographical clusters. Emerging, mid-career, and established Welsh and international artists, in partnership with communities and curators and producers will be the core creative engine charged with considering how best to integrate landscape (rural and urban), art and ideas.

The co-creation approach builds upon existing work of cultural organisations and social foundations, including that of Amgueddfa Cymru, Ideas: People: Places, and National Theatre Wales who have actively cultivated a network of 'ambassadors' across the nation and used community participation as a creative tool to achieve greater cultural democracy and positive social change.

A Curatorial Research Group will come together to develop and curate the works. Each member submits or commissions a single artwork and supports the journey of each piece to its location, whether a loan item from the national or an international collection or a commission developed with communities and contemporary artists.

While the National Canvas is a pioneering approach to public curating and national, democratic access to contemporary culture there is the potential for a remarkable legacy of artistic projects embedded in landscape and non-traditional venues. The proposed approach for Wales' builds upon the creative integrity (and, often, the audacity) of this type of work, innovated by artists in the Land Art (or Earth Art) movement of the 1960s and 1970s (Robert Smithson, Spiral Jetty, 1970; Nancy Holt (Sun Tunnels, Great Basin Desert, Utah, 1973-6; Alice Aycock; Walter De Maria; Nils-Udo), ongoing projects

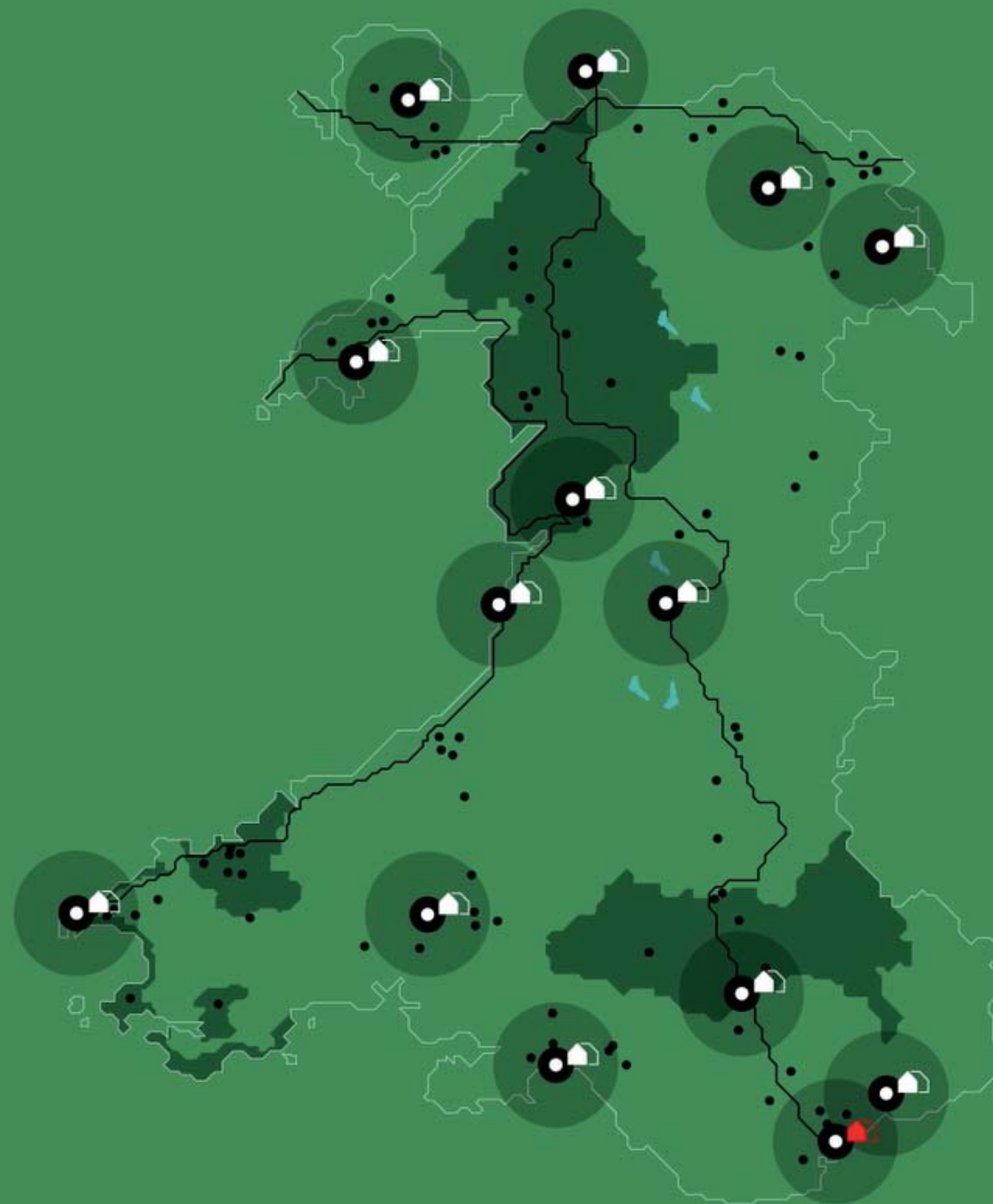
(James Turrell, best known for the Roden Crater, a natural cinder cone crater located outside Flagstaff, Arizona that he is turning into an expansive naked-eye observatory)), and established contemporary artists, such as David Nash, Christo and Jean Claude, Richard Long, Betty Beaumont, Beverly Pepper, Michael Heizer, Milton Becerra and Jacek Tylicki (Appendix 6: page 175).

Crucially, however, the approach proposed here is that the portfolio of 50 commissions will be co-developed strategically across Wales' expansive geography. Emerging, mid-career, established Welsh and international artists, in partnership with communities and open-minded curators and producers will be the core creative engine charged with considering how best to integrate landscape (rural and urban), art and ideas. We are not recommending 'parachuting in' large-scale, permanent sculpture. Instead this recommendation aims to embolden artists and communities to explore how creativity, landscape, and public spaces can intersect to create new forms of beauty and challenge how we see, work, communicate and experience our surroundings.

### **Phase two**

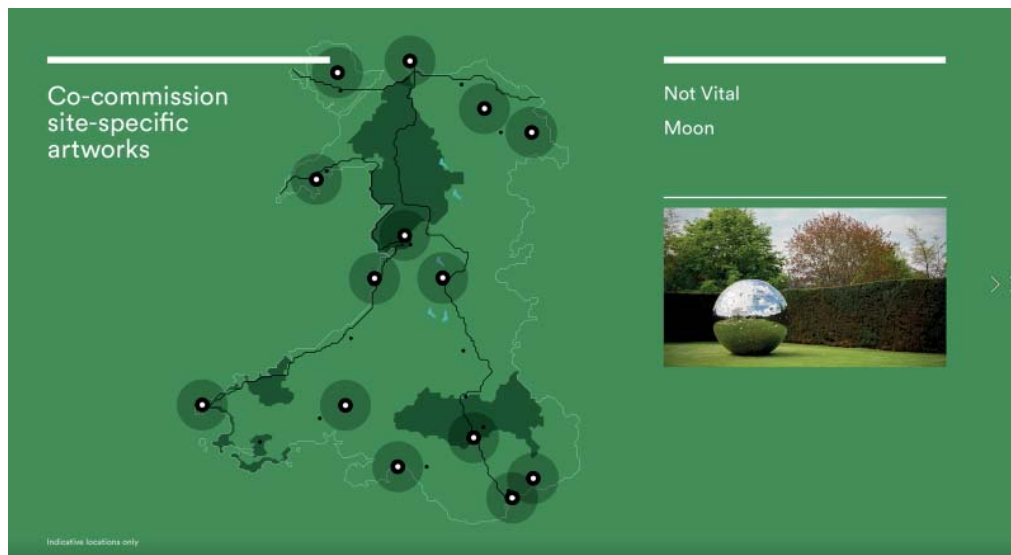
The National Contemporary Art Gallery Wales will also be defined by a distributed set of 6-8 galleries across the nation. While maintaining their core identity,





Indicative locations only

# Recommendations



# Recommendations

Figure 30: Final Recommendation  
Source: Event, February 2018





# Recommendations

programmatic remit and approach and physical footprint, the organisations that become part of this National Contemporary Art Gallery Wales will be branded as such. They will be further distinguished by the construction of site-specific, semi-permanent extensions, refurbished galleries or the building of a neighbouring structure. They will collectively showcase the nation's growing collection of contemporary art and have the physical capacity and additional staffing and financial resource to display large-scale international touring exhibitions.

Interested partners will be welcomed into a scoping and advocacy phase, including engagement with the Boards and Governance structures to explore how the model could be realised effectively. The identities of individual organisations should remain strong, yet the ambition should be to create a national, decentralized, greater whole. Ultimately we suggest that the 6-8 partners be selected via an open application process, encouraging cross-sector and interdisciplinary teams to make the case for their venue and community.

## Phase three

The final interlinked phase will be the building of A National Contemporary Art Gallery Wales headquarters, a permanent, sustainable and unifying space serving as a porous and vibrant platform for

contemporary art. This hub will enable Welsh citizens and tourists to experience immersive world-class new art created by living artists in Wales and abroad by actively brokering relationships with a global network of creators. This hub should be designed to include flexible spaces, allowing for visitors to create, observe, reflect and produce. This allows for architectural requirements to be established from 'scratch' and a gallery completely 'fit for purpose' to be developed. It could be located in a rural or urban area. These requirements and a detailed understanding of how the potential of this institution would be realised would be informed by learning from Phases one and two. (Figure 34)

Indicative costs suggest the capital spend to deliver all three phases will be in the range of £80m to £180m. Scenarios 1 (Figure 31) and 2 (Figure 32) outline indicative capital costs for all three phases.

By way of comparison the capital costings presented here to deliver a contemporary art offer for an entire nation are in the same cost range as stand-alone cultural facilities such as the Hepworth (£35m), Design Museum (£83m), V&A Dundee (£80m; announced), Wales Millennium Centre (£106m) Manchester Factory (£110m) and Tate Modern extension (£260m) (Figure 20).

For the delivery of Phases one and two, we recommend a national shared resource model, with a centralised hub. The hub need not be physically located in any specific gallery and would be designed to ensure partner venues and communities benefit from increased capacity, expertise and facilitated national dialogue and planning.

This hub would be defined by a collaborative leadership team who would regularly 'float' between venues and sites. The team would be charged with co-developing and positioning the full National Contemporary Art Gallery Wales, defined as The National Canvas, The Distributed Gallery and the HQ. The leadership team would build the case for support, and co-plan exhibition and co-planning and curating, collections development and conservation, educational and health programme development, fundraising, marketing, stakeholder engagement, advocacy, national and international profiling, and impact assessment.

The indicative annual operating expenditure for the centralised organisation co-developing and delivering Phases one and two, and establishing a Fellowship programme recommended below, would be in the region of £2.7m minimum.

# Recommendations

Scenario 1			
Phase	Artist / Curator/ Creative Producer Level	Artworks	
One	Emerging	15	
	Mid-career	15	
	Established	15	
	International	5	
	Total Artists	50	
Two	6		
Three	Yes		
Phase	Low	Medium	High
One	£5,410,000	£6,155,000	£6,750,000
Two	£34,800,000	£63,000,000	£100,800,000
Three	£40,000,000	£42,500,000	£45,000,000
Total	£80,210,000	£ 111,655,000	£152,550,000

Figure 31: Scenario one indicative capital costs for three phases, showing scalable costs

Source: Event, April 2018

Scenario 2			
Phase	Artist / Curator/ Creative Producer Level	Artworks	
One	Emerging	22	
	Mid-career	20	
	Established	5	
	International	3	
	Total Artists	50	
Two	8		
Three	Yes		
Phase	Low	Medium	High
One	£3,940,000	£4,520,000	£4,900,000
Two	£46,400,000	£84,000,000	£134,400,000
Three	£40,000,000	£42,500,000	£45,000,000
Total	£90,340,000	£ 131,020,000	£184,300,000

Figure 32: Scenario two indicative capital costs for three phases, showing scalable costs

Source: Event, April 2018

# Recommendations

The annual operating expenditure of a physical national headquarters (Phase three) could range anywhere from £2.5m and up (e.g. £15m), depending on the scale of the operation, the physical site, and how the team and programme is designed to interrelate with The National Canvas and The Distributed Gallery other 6-8 national galleries (Phase two). The next stage of the Feasibility Study requires extensive business planning, based on modeling a number of scenarios (e.g. assumed programme, defined sqm, projected visit numbers, days open, location(s), etc).

The proposed indicative annual operating expenditure for the national entity is significantly higher than the average annual operating expenditure of most visual arts organisations in Wales (For example, the ten visual Visual and Applied Arts Portfolio clients have an average annual operating budget of £490k, and these are most of the larger organisations in the visual arts ecosystem). Arts Council of Wales' total annual allocation to visual and applied arts (£1.7m revenue funding; £520k project funding) is less than what is proposed here. However the operating expenditure proposed (£2.7m for Phases one and two) includes financial resource that will be shared across The Distributed Gallery (i.e. 6-8 partner sites) and The National Canvas.

*"More than eight in ten adults (83%) agree/ agree strongly that there should be public funding of arts and cultural projects."*

Research Team, Arts Council of Wales,  
31st March 2016

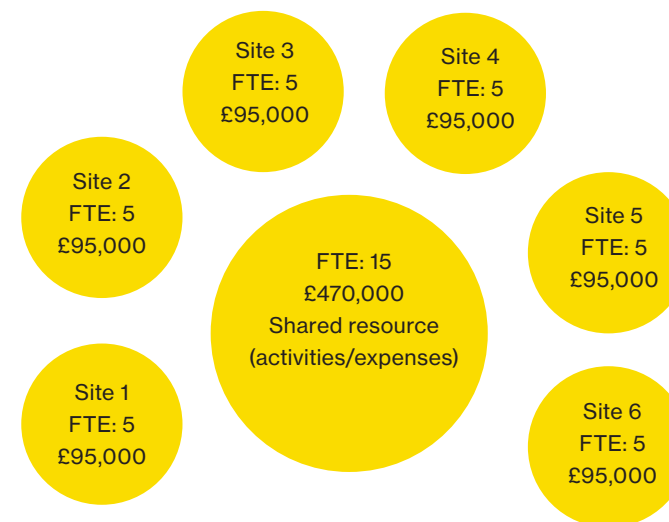


Figure 33: Indicative annual running costs of Phase two: Distributed Gallery  
Source: Event, April 2018

# Recommendations

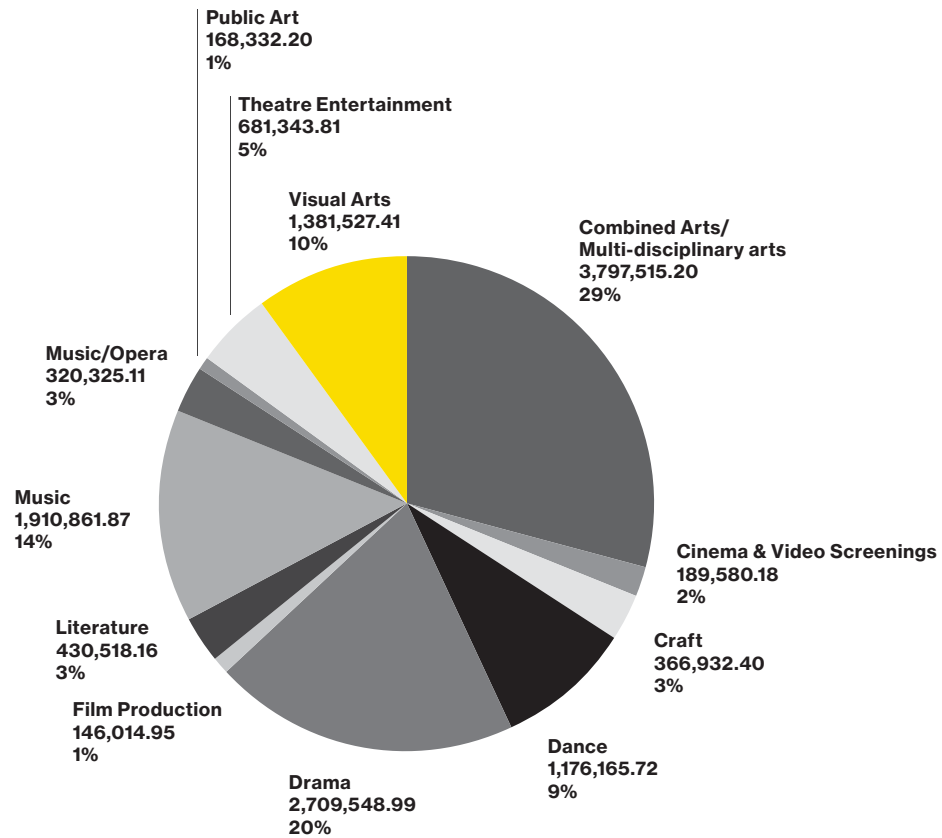


Figure 34: Lottery Grants per Artform 2017-18  
Source: Arts Council of Wales

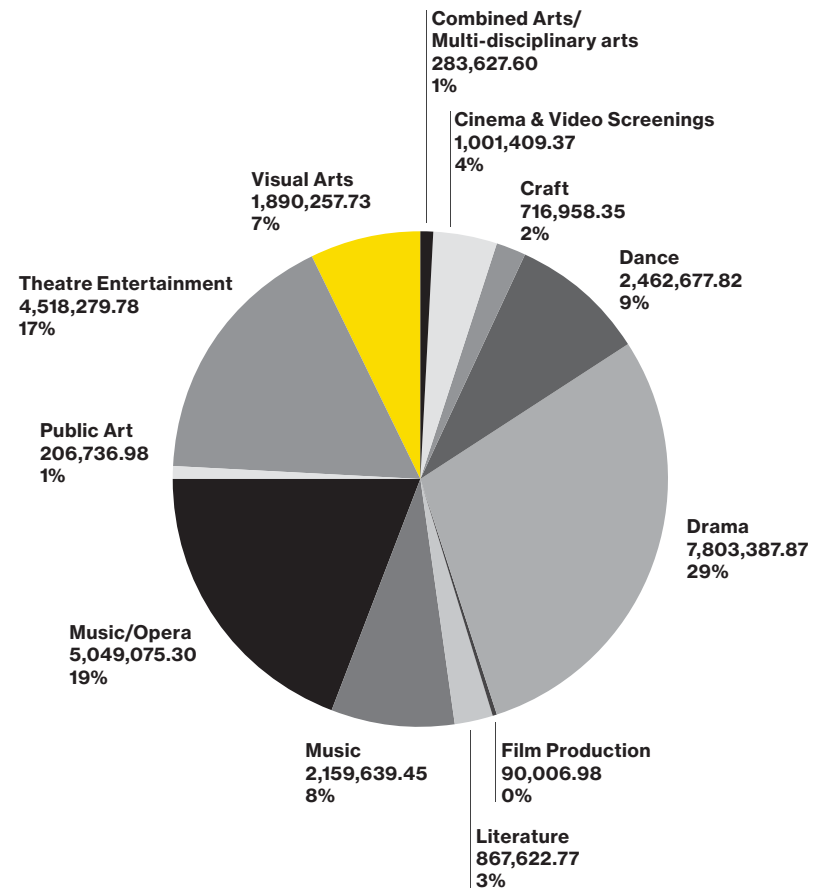


Figure 35: GiA Grants per Artform 2017-18  
Source: Arts Council of Wales

# Recommendations

## Recommendation two

An Advisory Panel is established to develop and drive the vision, concept and models forward. It is recommended that panel members include experts from both in and outside Wales, including those from the other Home Nations, as well as Visit Wales, MALD, representatives of Visual Arts Galleries Wales (VAGW) and Welsh Local Government Association (WLGA), investors and influencers. The new entity will have a high-profile steering committee with strategic decision making authority; representatives of the Amgueddfa Cymru may serve on this Committee, and Committee members may serve on the Board of Trustees.

## Recommendation three

In tandem, a National Youth Cultural Advisory Board is established, comprising people across Wales, aged 9-26 invited through an 'open-call'. The National Youth Cultural Advisory Board will co-develop and help shape the delivery plan for the national contemporary art entity. The Youth Advisory Board demonstrates a clear commitment to empowering the next generation of artists, creative thinkers, patrons, board members and investors to design their version of a relevant national contemporary art gallery. It is worth noting that younger investors and millennials are

also key constituents and emerging champions of the social impact movement.<sup>1</sup>

Arts Council of Wales has already committed to establishing an interconnected Youth Board as part of its operational plan (inspired, in part, by the experiences of The Roundhouse's (see Guided by Young Voices). It is recommended that these Boards work in parallel, if not under the same umbrella.

## Recommendation four

The Advisory Panel and Youth Cultural Advisory Board oversee the development and delivery of a series of collaborative concept workshops to explore, further design and strengthen the three phases in the imminent future. The agendas for these workshops will be co-designed, and depending on the topic, participants should be leading and emerging artists, curators, gallery directors, teachers, young people, and community activists. Representatives from the health, tourism and transport sectors, private developers and the private sector should also be engaged in this period, alongside enthusiastic world experts from a range of disciplines. The workshops will be designed to ensure that the detail of the three phases is robust, ambitious, practical and realisable. The concept workshops could culminate in a

high-profile symposium, a 2-3 day event, bringing together the participants from throughout this stage to showcase and discuss their final recommendations. It is critical that the concept workshops are as open as can be to both participants and ideas, addressing the concerns of several in the artist community, one of whom stated, *"There is a lot of passion for creating something sustainable; we see this as nothing but a positive thing. However it feels like we can't contribute, that is is a closed book happening on high."*

Yet as open as these workshop should be, they must be well structured, evoke a spirit of constructive criticism and result in tangible, deliverable outcomes.

## Recommendation five

The advisory panel recruits and appoints a remarkable, accomplished collaborative director to develop and drive this concept forward. The sequencing of this may happen early in the concept development stage, depending on the views of the Advisory Board.

## Recommendation six

A fundraising feasibility study is critical if a National Contemporary Art Gallery is to be pursued in a subsequent stage. This is to both ensure ongoing support is a realistic prospect, to explore how a national operating model will impact (positively and

negatively) existing funding streams designated for visual arts in Wales, and to unlock new funding streams. The income model for a new national entity of contemporary art must be defined by revenue opportunities that benefit the wider sector.

A vast range of partnerships and funding arrangements should be explored, including identifying and establishing shared strategic ambitions with other Welsh Government Departments, Business and Economy, Tourism, Educations and Skills, Environment and Countryside, Health and Social Services, Improving public Services, International, People and Communities, Transport. In addition, Local Governments, assessing the Welsh diaspora, through conversations with the Impact Investments sector, Arts & Business Cymru, The Art Fund and the National Trust. Given the focus on cultural empowerment and social change, it will be important to identify which institutions are eligible for Heritage Lottery Funding – both in terms Big Lottery and People's Postcode Lottery. The Big Lottery Fund funds projects and activities in the UK that make communities stronger and more vibrant, and that are led by the people who live in them; the latter is designed to support projects that further the aims of the People's Postcode Trust – employability

<sup>1</sup> "Pro-business," but expecting more, The Deloitte Millennial Survey (2017)



# Recommendations

and skills development, human rights, combatting discrimination or poverty prevention.

## Recommendation seven

The establishment of a Contemporary Creativity Endowment Fund is explored as a viable option for providing ongoing revenue support in perpetuity for the National Gallery of Contemporary Art. The Endowment could support the central organisation body, the creative clusters and a suite of fellowships and awards for nurturing creative talent, thought and ideas identified in Wales and internationally.

The Endowment would require the unlocking of new funding and investment sources. Its success is dependent on a sophisticated fundraising campaign driven by champions well-placed to enthusiastically reframe the culture of giving – to one about investing in Wales' creative engine and beauty.

## Recommendation eight

A Cultural Professional Fellowship will provide opportunities for Welsh emerging and established cultural professionals to work across the ecosystem. The Fellowship will welcome applicants from curatorial backgrounds as well as those of other disciplines, whose expertise is essential to a thriving arts and wider creative industries sector. This includes experience in

education, marketing, business planning, operations, technology, law, policy, social work, art therapists, data science, design, retail, catering, human resources, fundraising and events management.

## Recommendation nine

Sector-wide audience research should be delivered to assess the demand for any new entrant into the visual arts sector. It is essential that there is a more sophisticated understanding of the existing and potential market for contemporary visual arts venues, experiences and attractions in Wales; the relationship between these venues; motivations and behaviours for attending is understood; that barriers to access are clearly identified; that patterns across time and geography are tracked and leveraged. There is potential to ensure that organisations are empowered to collectively undertake sector-wide research that can be directly applied to making informed programming, marketing, positioning and business planning decisions at both national and local levels. A comprehensive training and research programme would provide an important legacy for the visual arts community.

## Recommendation ten

The culture and tourism sectors take steps to align their strategies and work more closely together to:

- Build on the existing tourism market in Wales;
- Embed visual arts into the existing tourism campaign, The Wales Way;
- Provide an experience distinctive to Wales that cannot be found elsewhere;

Deliver a combination of indoor and outdoor arts attractions that are closely linked to the different Welsh communities and sense of place to meet the expectations of international holiday makers.

## Recommendation eleven

The advisory board develops and delivers a series of pilot projects – part of the 100 works in The National Canvas – in the immediate term. These projects will ensure investment already ring fenced for the Feasibility Study is used efficiently to move the National Contemporary Art Gallery Wales forward. The pilot projects should be shaped as action research - enabling the team to test different ways to convene and empower audiences, explore ideas for contemporary art projects and provide opportunities for collaborative working. Learning from these projects should be shared widely (e.g. in publications, part of a symposium, facilitated discussions) and applied to the next set of National Canvas projects.

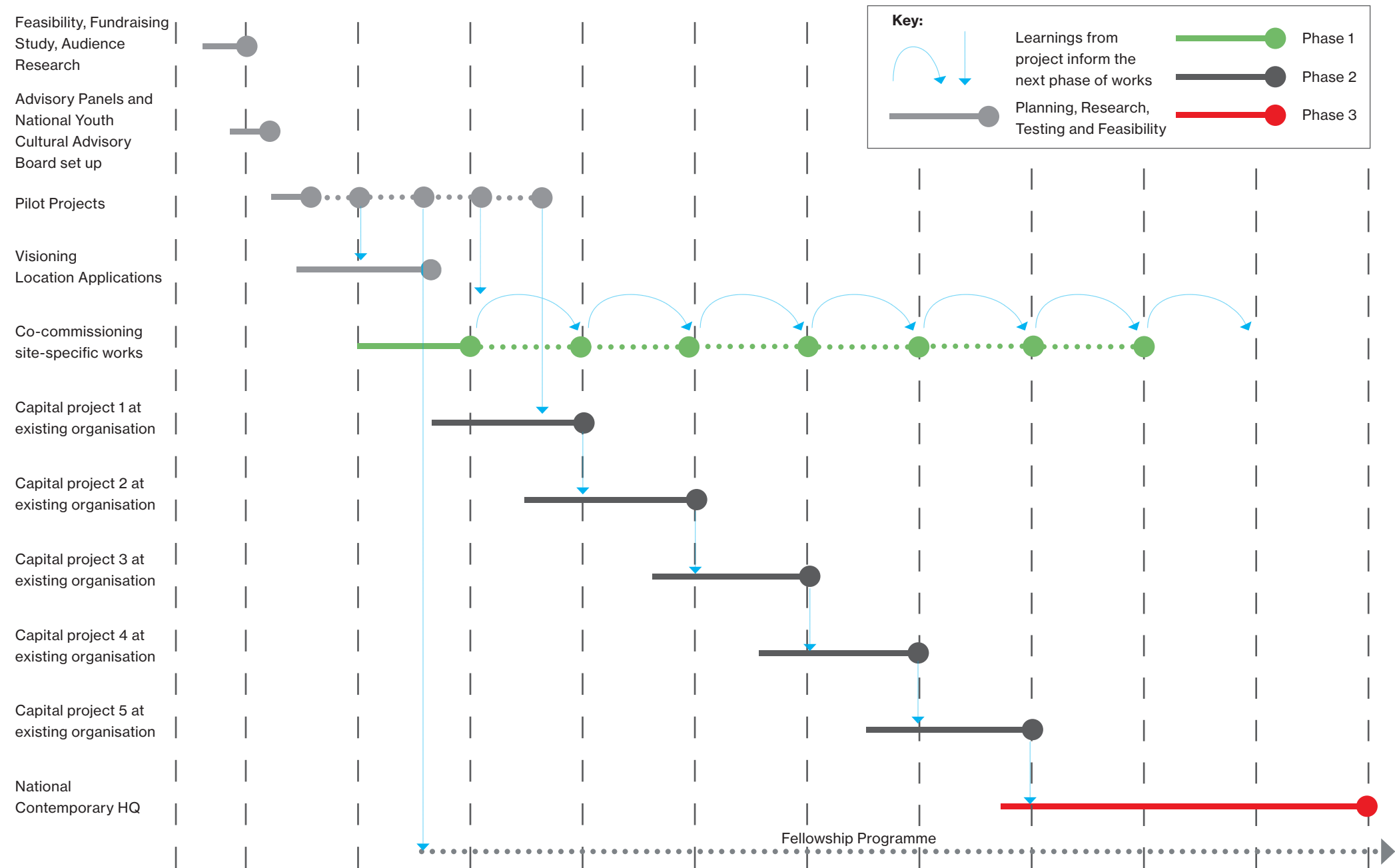


National Youth Arts Advisory Group, Scotland (35 volunteers, aged 14-23 that influence the next phase of Scotland's national youth arts strategy, Time to Shine, guide Creative Scotland and the Scottish Government on cultural strategy and develop ways to connect young people and the arts)

Source: Creative Scotland, 2017

Cabban Crefft / Craft Cabin (a two-year Culture, Health and Wellbeing initiative funded by the Health Lottery and run by Arts Alive Wales. A co-creation project with artists with lasting impact for the young people that take part  
Source: Arts Alive Wales

# Recommendations



# Recommendations

## Aligning with Welsh Policy and Reports

The above recommendations address and align with the recommendations from a number of reports associated with arts and culture in Wales, including:

- Building Resilience – Inquiry into Non-Public Funding of the Arts (2018);
- Sharing Treasures: Past and Future (2015);
- Expert Review of Local Museum Provision in Wales (Dr. Hayden E Edwards, 2015) ;
- Culture and Poverty (Baroness Kay Andrews OBE, 2014)
- Valuing Place, The Young Foundation (2017);
- Make: Reach: Sustain: the future of the arts in Wales (Arts Council of Wales, 2015)
- The Future Generations Act (2015).

These crossovers are identified in the following pages (Figures 37-43).



Sharing Treasures: Past and Future; Expert Review of Local Museum Provision in Wales (2015) – Dr. Hayden E Edwards; Culture and Poverty (2014) – Baroness Kay Andrews OBE, Valuing Place, The Young Foundation;

Figure 36: Indicative phased and progressive approach to delivering the National Contemporary Art Gallery Wales  
Source: Event, April 2018

# Recommendations

Recommendation	Non-Public Funding of the Arts (2018)
1	Maximise financial support for the arts from business
3	Increase awareness of, and investment in, the excellent arts organisations and projects based in Wales, by UK-based trusts and foundations
5	(Research to) identify and exploit international markets that have growth potential for Welsh arts organisations
7	The Welsh Government should consider implementing a clear strategy to assist Wales' arts sector to grow international markets
8	Provide a source of fundraising expertise to help small arts organisations increase their non-public fundraising in an analogous fashion to the support it currently provides for small businesses through Business Wales
9	Improve the financial resilience of non-revenue funded organisation

Recommendation	Sharing Treasures: Past and Future (2015)
(p05)	Category 1 – capital improvements to permanent or temporary galleries containing national loans
4 (p18)	Consider the potential for developing touring exhibitions, either between groups of partner museums, non-partners who already meet GIS standards, or as a development of a display at one partner museum
4 (p18)	Improving exhibition spaces. The scheme's major lasting value arises from the capital development that funds infrastructure improvements
4 (p22)	Reinstate partnership meetings to aid communication and sharing experience

Recommendation	Expert Review of Local Museum Provision in Wales (Dr. Hayden E Edwards, 2015)
5 (p49)	Put measures in place to establish Collections Wales which will rationalise, develop and safeguard collections of significance to the histories and cultures of Wales
6 (p49)	Collaborate to identify and provide the skills development needed to support the workforce during the transition and beyond, in order for it to be able to fully achieve the requirements of the Museums Charter

Figure 37: Aligned recommendations from Building Resilience - Inquiry into the Non-Public Funding of the Arts (2018)

Figure 38: Aligned recommendations from Sharing Treasures: Past and Future (2015)

Recommendation	Valuing Place, The Young Foundation
	Knowing how people in places experience inequality is critical to policy-making
	Promoting counter-narratives to those of deprivation and decline is essential
	Allocation of resources needs to be better targeted to meet community aims
	Policy makers need to recognise, celebrate and amplify the actions which people are already taking, including those which are small-scale and loosely formed
	Local networks need to be established as a priority to help encourage, train, mentor and connect people together who want to take local action
	Decision-makers and influencers need to be working with communities in different ways, away from things being 'done to', to co-creating new solutions to existing problems

Recommendation	Future Generations Act
A prosperous Wales	An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change), and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work
A more equal Wales	A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic circumstances)
A Wales of cohesive communities	Attractive, viable, safe and well-connected communities
A Wales of Vibrant culture and Welsh language	A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, sports and recreation
A globally responsible Wales	A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being

Figure 39: Aligned recommendations from Expert Review of Local Museum Provision in Wales (Dr. Hayden E Edwards, 2015)

Figure 40: Aligned recommendations from Valuing Place, The Young Foundation  
Figure 41: Aligned goals from Future Generations Act

# Recommendations

Recommendation	Culture and Poverty (Baroness Kay Andrews OBE, 2014)
1 and 2	Widening Access And Breaking Down Social Exclusion – Breaking down physical and psychological barriers to our institutions
	Going Local: Increasing Engagement at Community Level – Anchoring culture within communities and increasing impact of outreach programmes
4	Challenge the cultural sector, through strategic direction and funding and other support, to expand efforts to place their institutions at the heart of communities and widen access to all
5	Cultural organisations to ‘go local’ and ‘stay permanent’ by giving greater priority to shared projects in local communities and identifying and using shared space for displays and activities
9	Incentivise and encourage local authorities to look at possibilities for cross-boundary support and sharing of services
10	Community and Culture networks to be developed, linking community and cultural organisations at a local level, to share knowledge and resources and plan joint initiatives to address the cultural deficit within communities
	Driving Ambition and Driving Up Standards: Culture and Learning – Measures to harness culture to help close the attainment gap
15	Reinforce the inclusion of cultural activity within and outside the school day and school term, highlight good practice, and look for positive ways in which to encourage and enable schools to work more collaboratively with cultural organisations
19	Arts Council of Wales to revisit the ‘Reach the Heights’ arts participation programme to offer engaging cultural activities geared to 9-13 year olds at risk of becoming NEET
25	The Power Of Place: The Place For Skills – Harnessing culture to drive regeneration and improve skills
	Develop a more proactive and coherent national approach to cultural apprenticeships to make an impact on national unemployment reduction strategies

Figure 42: Aligned recommendations from Culture and Poverty (Baroness Kay Andrews OBE, 2014)

Recommendation	Culture and Poverty (Baroness Kay Andrews OBE, 2014)
	A Single Conversation – Key all-Wales strategies around the cultural ‘infrastructure’ to focus and drive greater engagement around poverty
28	Articulate and promote the role of culture in supporting a broad range of policy objectives to drive coherent links into policy at national and local authority level
33	Welsh Government, Welsh Local Government Association (WLGA) and cultural organisations to develop consistent KPIs for the arts, cultural and heritage sector that incentivise efforts to improve wellbeing through engaging people in cultural projects in the community

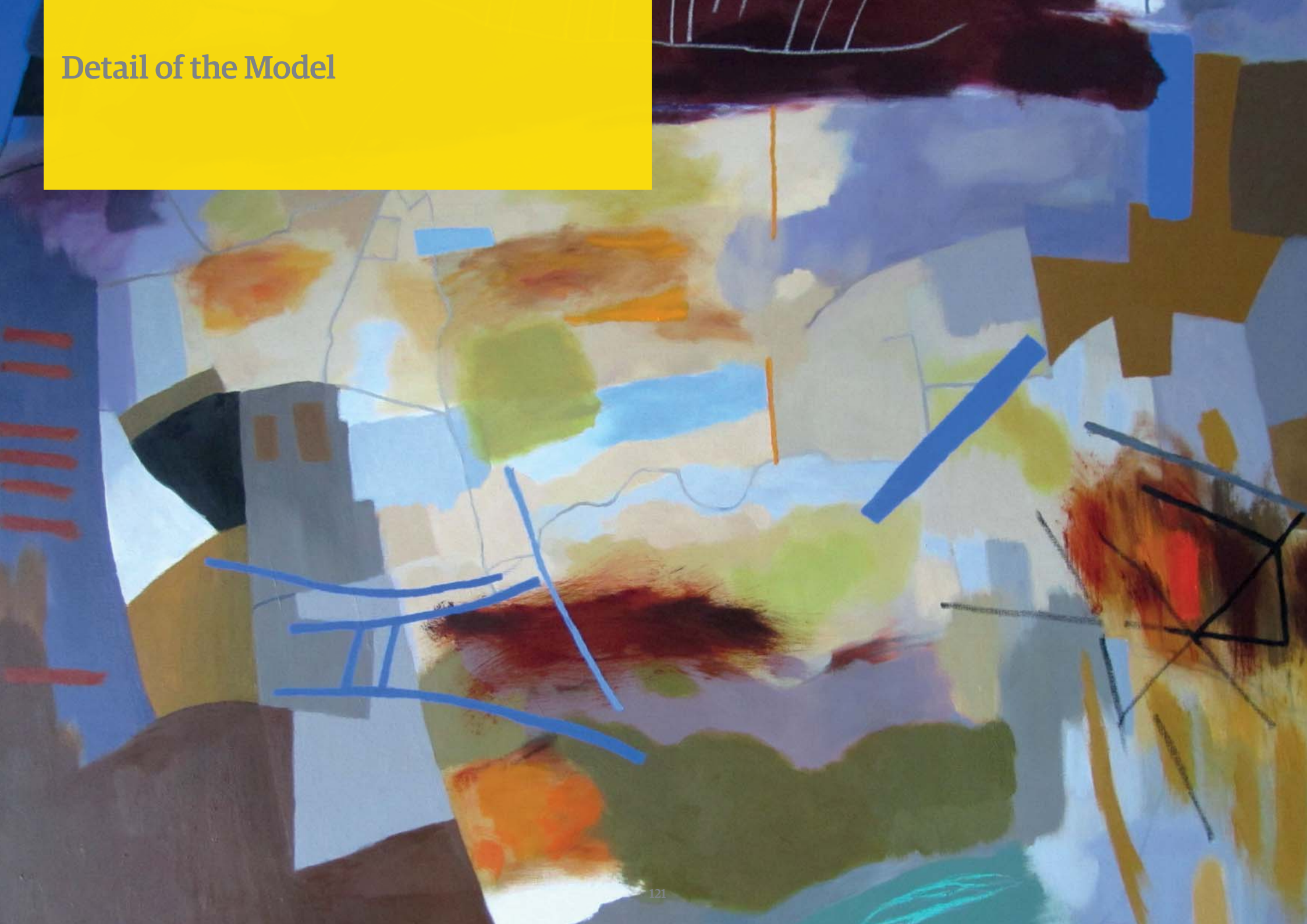
Theme	Make: Reach: Sustain: the future of the arts in Wales (Arts Council of Wales, 2015) Objectives
Make	1. Creating the environment for the arts to flourish
	2. Increasing the value of international cultural exchange to the arts in Wales
Reach	3. Funding new opportunities, ways and places for people to enjoy and take part in the arts
	4. Developing the creativity of children and young people
Sustain	5. Encouraging innovation, resilience and sustainability
	6. Protecting and growing the economic base for the arts in Wales
	7. Demonstrating the value of the arts
	8. Making the Arts Council an efficient and effective public body

Figure 43: Aligned objectives from Make: Reach: Sustain: the future of the arts in Wales (Arts Council of Wales, 2015)





## Detail of the Model



# Phase One: The National Canvas, Co-commissioned Artworks

## Phase One: Capital Requirements

- Large commissions budget ring-fenced for first artworks, 50 artworks across the country. Commissions range in cost between £40,000 to £5m. For the purposes of financial modeling, we have assumed the average budget is £60,000 per project;
- Minimal spend required for supportive infrastructure (e.g. sheltered education spaces, retail units, F&B, or viewing areas adjacent to commissions);
- Requirement for signposting across Wales (online and physically).

## Phase One: Operational components Leadership and Team

- Lead Artistic Director and a team of creative producers that collaboratively develop and oversee the programme in their geographic clusters;
- A Curatorial Research Committee made up of the general public, artists and creatives, and young people (See Recommendation Four) works alongside specialists to co-curate the exhibition and commission site-specific works;
- Potential for shared resource pool across visual arts ecology relying on anchor organisations for fundraising, marketing, conservation

## Programme and Exhibition

- A significant proportion of the external commissions could be permanent; those

- in disused spaces are temporary physical structures or experiences;
- Rolling programme of commissions could be added over time;
- Systems for commissions to be acquired by Amgueddfa Cymru.

## Collections Mobility

- Mid-scale logistical requirements. Low transport. High insurance costs.

## Education and Engagement

- Onsite and online formal and informal learning.

## Phase One: Commercial Opportunities

- Potential to develop new forms of commercial opportunities (given non-traditional spatial brief), including pop-up restaurants, cafés, street food venues. Potential commissioning agreement with catering and retail;
- A commercial officer will develop a compelling nationwide retail offer, (a visual arts brand for Wales), partnering with product design/fashion students in art schools to draw on assets from across the nation and sold at multiple sites online and off.

## Marketing

- Emphasis on local, regional, national marketing and international tourism and cultural industry;
- Link to Wales Way;

- Stakeholder mapping, engagement and communication

## Development

- Classically diverse fundraising strategy – trusts, foundations, individual donations and corporate sponsorship;
- Potential to draw funds from capital investment projects in other sectors (Section 106, place-making and public art);
- Corporate sector sponsorship for specific commissions and /or corporate sponsor for the Nation's Canvas;
- Legacy fundraising;
- Ongoing crowdfunding campaigns.

## Maintenance

- Security and insurance requirements at all sites;
- Maintenance requirements for outdoor artworks.

## Partners

- Artists and artist collectives;
- Visual arts organisations;
- Local Authorities;
- VisitWales;
- Community Groups;
- Catering companies (e.g. pop-up food truck);
- Corporate partners;
- International peers;
- Embassies;
- Colleges and universities;

- Private developers;
- Forest Commission.

## Indicative Timescale

- Year One: Recruitment of curatorial leadership and team; establish curatorial research committee; establish key partnerships; establish marketing and fundraising approaches; develop national education programme; launch commissioning programme – piloting a series of works as early on in the year as possible.
- Year two-four (and ongoing): Commissions across Wales.

## Phase One: Value-Added to Wales

- Extends the nation's cultural tourism offer;
- Disrupts the traditional contemporary art gallery model (white-box space, starchitect-designed) while being authentic and using Wales's most cherished assets;
- Builds a contemporary arts audience within Wales through developing a dialogue and engagement at a local level;
- Provides truly democratic access to the collection and any new commissions for Welsh people, in particular those that do not feel art or galleries are for them; this work will be designed and owned by them;
- Results in indirect economic benefit of

# Phase One: The National Canvas, Co-commissioned Artworks

visitor day spend and short term job creation;

- Develops new ways to 'collect the uncollectable' within the national collection.

## Phase One: Strengths

- Highly visible in Wales and provides compelling press and marketing opportunities;
- Journey across the canvas provides a pilgrimage for visitors, the antithesis of instant gratification where culture can be experienced at any time from any device;
- Highly innovative. It provides an accessible experience – going beyond the gallery. It extends current curatorial practice and encourages a new education and engagement model;
- Focuses on the specifics of place and the land of Wales, which is in keeping with the strengths of Welsh modern and contemporary art;
- Positions the landscape as an opportunity rather than a barrier and uses disused buildings to provide exciting opportunities for artists to work in;
- Pushes contemporary visual artists work forward, encouraging them to respond to landscape – rather than 'white box' opportunities;
- Decentralised approach enables it to be delivered throughout Wales, in different location types – urban and rural,

populated and unpopulated, etc;

- Provides employment opportunities across Wales;
- Increases sense of a community and ownership through co-curation and commissioning;
- Develops national collection through new commissioning, while providing opportunities to display large (often unseen) contemporary works;
- Develops new funding opportunities that break the mould.

## Phase One: Weaknesses

- Too diffuse;
- Relies on Welsh transport lack of infrastructure might dictate location of artworks;
- Limits access to those without vehicles;
- Outdoor elements may be perceived to be a limiting factor;
- While disused buildings could showcase new commissions, these are unlikely to be environmentally-sound and would have cost implications for opening / closing and invigilation. This could prohibit some site-specific commissions being on display for extended periods;
- Does not directly address capacity issues raised by sector.

## Phase One: Risks

Risks	Mitigation
Loss of curatorial vision across complex programme	Recruit artistic leadership with collaborative ethos, strong communication skills, extensive track record and ambitious vision; Ensure curatorial vision is well communicated and sense of ownership shared widely; Ensure ambitious roll out of programme, including world-class artist commissions (Welsh and overseas artists) and online presence; ensure works of art are geographically spread, but accessible; Partner with VisitWales to ensure the programme is strategically promoted to domestic and international tourists
Lack of high visibility	Track and measure success of programme – its impact on audiences, artists, national identity, local economies, nearby attractions (on Wales Way) and associated investment in scheme and press coverage. Ensure some projects are rolled out quickly at the outset, and key marketing opportunities developed early on
Easily cancelled if programme does not demonstrate clear successes or impact in short term	Build buy-in at an early stage, working closely with all partners to understand if/how this integrates with existing job function and what additional resource would be required Ensure clear and robust timeline is developed for roll out of all phases
Staff see delivering components of the co-commissioning as an 'add on' to their existing job description, rather than integrated	Establish dedicated team; Hold regular meetings with regional creative clusters with clear agenda to discuss how programming is developing, where there are difficulties and how these can be addressed; Celebrate and promote successes formally and informally – internally and externally



## Phase Two: Delivery of Distributed Model

### Capital Requirement

New capital structure to be put in place at each venue; level of investment would vary based on size of structure, longevity and recent capital works (e.g. Glynn Vivian's 2016 extension, by way of example only, does not currently need a new physical structure; however as part of the network, a pop-up architectural solution could be put in place near to the site branded as the National Contemporary Art Gallery Wales). The capital cost for a semi-permanent extension is likely to be iro £3,000-£3,500 per sqm.

A preliminary budget for a semi-permanent small new extension would be £4.5m. This assumes approx. 480sqm public space, 300sqm of temporary gallery space, approximately 300sqm of collection storage and associated amenities and 300sqm BoH space.

A preliminary budget for a semi-permanent medium extension would be iro £8m. This assumes approx. 600sqm public space, 800sqm of temporary gallery space, approximately 600sqm of collection storage and associated amenities and 480sqm BoH space.

A preliminary budget for a semi-permanent large extension would be iro £13m. This assumes approx. 940sqm public space, 1,300sqm of temporary gallery and

community space, approximately 950sqm of collection storage and associated amenities and 830sqm BoH space.

### Operational components

#### Leadership and Team

- Curatorial committee that ensures a coherent curatorial voice for joint exhibitions;
- Equal relationships across venues, rather than being 'dictated outward' from Amgueddfa Cymru;
- Clear opportunities for professional skills development – both formal and informal;
- Extended capacity for delivering national collection programmes and associated education and community programmes that meet the audience requirements of each associate venue (not a one size fits all approach to education and outreach);
- Robust marketing plan to ensure visibility and brand identity;
- Potential for shared resource pool across visual arts ecology relying on anchor organisations for fundraising, marketing, conservation;
- Encourages a mixed portfolio of established and new venues and organisations.

#### Programme and Exhibition at Each Venue

- Associate venues still offer their current programmes, but have a national collection/gallery designated as a physical space on (or near) site;

- Associate venues are expected and encouraged to ensure cohesive programme alignment between the 'national' and their independent work.

#### Collections Mobility

- Minimal logistics internally and low transport and insurance costs regarding collection movement (i.e. permanent collection does not need to be de-installed when a temporary exhibition is shown assuming that National Museum Cardiff is automatically one of the sites that receives a semi-permanent extension);
- Externally, medium costs associated with collections movement. Medium transport and insurance costs.

#### Education and Engagement

- Early involvement of learning and marketing teams from the National Gallery of Contemporary art Wales' and partner organisations to ensure that there is an integrated approach. Onsite and online formal and informal learning. A coherent education offer across all sites;
- Clear understanding of local audiences at each venue to ensure audience needs and interests are being met;
- Community "in-reach" required to extend audiences beyond those visiting.
- Co-curation with targeted groups;
- Formal engagement officers required.

### Commercial Opportunities

- Catering, retail, and events personnel required.

### Marketing

- Emphasis on local, regional, national marketing and international tourism and cultural industry.

### Development

- Classically diverse fundraising strategy - trusts, foundations, individual donations and corporate sponsorship;
- Necessity to quantify and cultivate Welsh diaspora;
- Potential to ensure Amgueddfa Cymru's new membership scheme deploys best practice in building membership community.

### Building Maintenance

- Consistent and predictable facilities, maintenance and security costs in line with industry averages.

### Partners

- 6-8 sites selected for their strategic alignment including:
  - Geographical location and catchment;
  - Curatorial focus (e.g. Pontio/circus; Plas Glyn/artist residences);
  - Governance;
  - Funding mode;
  - Partnerships.
-



## Phase Two: Delivery of Distributed Model

### Timescale

- Year one: Develop open-call application process, encouraging partners to apply as a community/civic/creative team to be designated a national gallery. Identify partners and establish curatorial committee; establish branding; assess capital opportunities at each partner venue;
- Year two-four: Establish curatorial programme; roll out capital extensions;
- Year five: Additional partners added according to identified assessment criteria;
- Ongoing: evaluation of programme (any venues that are not working to be addressed or removed) potential for further partners to be added.

### Phase Two: Value-added to Wales

- Extends the cultural tourism offer;
- Expresses confidence in the visual arts and raises its visual arts profile in and out of Wales;
- Alleviates the Cardiff-centric concerns amongst non-Cardiff-based audiences and organisations;
- Increases combined supply-chain and induced spending in local areas including construction employment and potentially additional visitor spend.

### Phase Two: Strengths

Allows for a pilot phase to test what is working, where footfall or reach has

increased at sites and how the idea might be scaled. More permanent structures could be put in place once worth proved; Ensures collection is widely distributed across Wales and unseen collections are made visible; Ensures 'national' is truly national and geographically dispersed; Celebrates the uniqueness of each venue and community with the potential for different architectural interventions at each site; Allows for current partners' current programmes/displays to be delivered and exhibited; i.e. they do not need to be removed for the collection to be shown; Inspires dialogue and juxtaposition between partners' existing programmes and works from national collection; Improves curators' professional development through joint working (arranging loans and partnership exhibitions); Encourages all organisations to 'raise their game' to be seen as a 'destination' on a 'bracelet' of venues; Does not rely on the infrastructure within existing building; Allows for both split-venue touring (exhibition showing in several sites simultaneously) as well as consecutive programming; Could be seen in parallel or delivered in sequence with other models.

### Phase Two: Weaknesses

- Requires buy-in from planners and local authorities;
- Precludes all visual arts organisations from participating;

- Requires space beyond the existing building footprint;
- Creates increased competition for funding, particularly from foundations and trusts.

### Phase Two: Risks

Risks	Mitigation
Visual arts organisations feel excluded from the distributed national gallery and any related public or private funding opportunities	Develop and communicate clear rationale and criteria for why organisations are included in the bracelet; Identify programmes, research, exhibitions or knowledge-sharing events that actively include non-bracelet members; Ensure sector-wide advocacy for the visual arts integrates coordinated messages from the entire sector
Not perceived to be locally relevant as a 'one-size-fits-all' approach	Undertake research and facilitate conversations that enable partners to develop shared aims and interests; Identify unique attributes, audiences and possibilities at each site to position each venue as distinctive
Lack of limited visitation to some sites (e.g. rural)	Ensure attractive proposition is communicated about each site; Identify opportunities and incentives to encourage repeat visitors, and encourage visitors to travel across the network; Partner with VisitWales to ensure all venues are actively promoted to domestic and international tourists
Staff see delivering the national gallery extension programme as an 'add on' to their existing job description, rather than integrated	Build buy-in for programme at early stage, working closely with all partners to understand if/how this integrates with existing job function and what additional resource would be required; Hold quarterly meetings with sector-wide team with clear agenda to discuss how programming is developing, where there are difficulties and how these can be addressed; Celebrate and promote successes formally and informally – internally and externally
Lack of recognition from the Welsh Government	Track and measure success of programme – its impact audiences in particular; Celebrate and promote successes of Partnership externally

# Phase Three: National Contemporary Art Headquarters

## Phase Three: Capital requirements

While Phases One and Two are interlinked in their sequencing, Phase Three will draw upon the learning, values and networks developed previously. The personality and identity of the new National Contemporary Art Gallery Wales headquarters is therefore one that will crystallize over time. At the writing of this report, based on extensive benchmarking and a number of understood parameters about the purpose of such a building, we suggest that a new build with a starchitect attached would cost a minimum of £50m. This assumes £5,000 per sqm and approximate GFA of 10,500sqm. For a more functional build, the cost would be in the region of £42m, assuming a 4,000 sqm space.

At this stage the core operational components are generalised, and require nuancing as Phases One and Two get underway.

## Operational components

### Leadership and Team

- Centralised management but with greater flexibility and independence. A single visionary leader. In-house and guest curators;
- Limited potential for shared resource pool across visual arts ecology. However, can draw on existing expertise in contemporary art and design already employed at Amgueddfa Cymru.

## Programme and Exhibition

- Permanent exhibition installed once, with 5-10% flexibility for annual changeover;
- Temporary exhibition installed regularly (3 large per annum; 4-5 small per annum);
- Of the temporary exhibitions, 1-2 designed to tour nationally / internationally.

## Collections Mobility

- On set-up significant logistical requirements;
- On-going mid-scale costs associated with mobilising collection (i.e. permanent collection does not need to be de-installed when a temporary exhibition is shown, however national collection needs to be transported beyond Cardiff);
- Externally, medium costs associated with collections movement. Medium transport and insurance costs.

## Education and Engagement

- Onsite and online formal and informal learning;
- Community “in-reach” required to extend audiences beyond those visiting.
- Co-curation with targeted groups.
- Formal engagement officers required.

## Commercial Opportunities

- Catering, retail, events, hire personnel required.

## Marketing

- Emphasis on local, regional, national marketing and international tourism and cultural industry

## Development

- Classically diverse fundraising strategy - trusts, foundations, individual donations and corporate sponsorship;
- Necessity to quantify and cultivate Welsh diaspora. There is potential to ensure Amgueddfa Cymru's new membership scheme deploys best practice in building membership community.

## Building Maintenance

- Consistent and predictable facilities, maintenance and security costs in line with industry averages.

## Partners

- Local authority (site identification, assistance with delivery, planning process, integration with existing infrastructure, brokering partnerships, financial contribution to capital and likely ongoing revenue support);
- Government;
- Artes Mundi;
- Neighbouring facilities;
- Local cultural and educational partners;
- Local community groups;
- Visual Arts Galleries Wales (VAGW);
- Higher education;

- Corporate sector;
- International peers.

## Timescale

3-7 years

## Phase Three: Value-added to Wales

- Extends the cultural tourism offer, particularly if located on the Wales Way;
- Expresses confidence in the visual arts and raises its visual arts profile in and out of Wales;
- Provides a positive economic impact through combined supply-chain and induced spending in local area including job creation, construction employment and additional visitor spend.

## Phase Three: Strengths

- Delivers a fit-for-purpose building with high-quality design. It is not limited by the existing National Museum Cardiff site or infrastructure;
- Provides new identity in locality;
- Potential for attracting new audiences depending on location;
- Focuses on modern and contemporary visual art, giving Amgueddfa Cymru a new platform for this discipline and enabling space to be freed up in the Amgueddfa Cymru;
- Affords short-term press opportunities.

## Phase Three: National Contemporary Art Headquarters

### Phase Three: Weaknesses

- Potentially limits impact for all of Wales;
- While potentially benefiting from a high-profile opening, potentially difficult to sustain funding, profile and momentum;
- Places all investment in the Amgueddfa Cymru, while others in the visual arts sector do not benefit directly.

### Phase Three: Risks

Risks	Mitigation
Creates increased competition with existing visual arts and cultural offer in Wales	Draw on existing collaborative ethos of the Amgueddfa Cymru curation/collections teams to jointly develop vision for the extension that draws on local, regional national and international expertise in contemporary visual arts; Identify tangible ways in which the sector could co-deliver aspects of the programme to ensure it draws on existing cultural/creative/HEI assets in identified region
Lengthy negotiation	Develop collaborative partnership with all stakeholders at early stage, being transparent about anticipated barriers, risks and challenges and how these can be collectively addressed; Seek to understand developers and local authority's ambitions and how these connect to the out-post model, and what aspects of the outpost's ambitions are non-negotiable, critical-success factors. Consider collectively how these can be achieved. Ensure clear off-site programme is in place, drawing on cultural and community; ensure these platforms are still used creatively after gallery is open
Seen as un-innovative – simply copying every other visual arts gallery in the world	Ensure the design, place-making and content is Wales-specific; ensure any architectural competition focuses on this authenticity and the requirement that the gallery evoke a national, collaborative, transparent and open spirit in its physical design. Consider rolling out other models identified in advance of opening that focus on collaborative, ambitious exhibitions/collections development across Wales

# Preliminary Capital Costs

Build Type	Public Non-Collection (sqm)					Public Collection (sqm)		
	External	Entrance	Social Spaces	Amenities	Learning	Permanent	Temporary	Community
Large New Extension – Distributed Site	300	200	200	100	120	0	1200	100
Mid-range	PNC Total: 920					PC Total: 1300		
Medium New Extension – Distributed Site	200	200	60	60	80		800	
Mid-range	PNC Total: 600					PC Total: 800		
Small New Extension – Distributed Site	200	100	60	60	60	0	300	0
Mid-range	PNC Total: 480					PC Total: 300		
Large Refurb – Distributed Site	0	0	0	0	0	0	1200	0
Mid-range	PNC Total: 0					PC Total: 1200		
Medium Refurb – Distributed Site	0	0	0	0	0	0	800	0
Mid-range	PNC Total: 0					PC Total: 800		
Small Refurb – Distributed Site	0	0	0	0	0	0	300	0
Mid-range	PNC Total: 0					PC Total: 300		
Iconic Headquarters	800	600	400	220	480	2000	1200	500
Signature Architect	PNC Total: 2500					PC Total: 3700		
Mid-range	PNC Total: 2500					PC Total: 3700		
Functional Build	PNC Total: 2500					PC Total: 3700		

Figure 44: Preliminary capital costs for contemporary art gallery based on current sqm rates. These are indicative costs only based on international benchmarks. A more detailed feasibility needs to be undertaken.

# Preliminary Capital Costs

Non-Public Collection (sqm)				Non-Public Non-Collection (sqm)				NFA Total (sqm)	5%	GFA Total	Cost pm2 (£)	Preliminary Budget (£)
Collection Storage	Conservation	Exhibition Storage	Transit	Offices	Technical	Kitchens / Retail Store Etc	Plant					
300	0	400	250	80	100	200	450					
NPC Total: 950				NPNC Total: 830				4,000	200	4,200	£4,000	£16,800,000
200	0	200	200	40	60	80	300					
NPC Total: 600				NPNC Total: 480				2,480	124	2,604	£4,000	£10,416,000
100	0	100	100	20	40	40	200					
NPC Total: 300				NPNC Total: 300				1,380	69	1,449	£4,000	£5,796,000
0	0	400	0	10	30	0	20					
NPC Total: 400				NPNC Total: 60				1,660	83	1,743	£4,000	£6,972,000
0	0	200	0	10	30	0	20					
NPC Total: 200				NPNC Total: 60				1,060	53	1,113	£4,000	£4,452,000
0	0	100	0	10	30	0	20					
1000	250	300	250	200	300	300	1200					
NPC Total: 1800				NPNC Total: 2000				10,000	500	10,500	£7,000	£73,500,000
NPC Total: 1800				NPNC Total: 2000				10,000	500	10,500	£5,000	£52,500,000
NPC Total: 1800				NPNC Total: 2000				10,000	500	10,500	£4,000	£42,000,000



# Preliminary Operational Costs

Centralised Resource / Costs	Scenario One Phase One
<b>Charitable Activities / Direct Programming Expenses</b>	
Exhibitions	-
Collections & Research	-
Public Programmes	£20,000
Education / School Tours	£15,000
Fellowship Programme	-
Museum Operations	£10,000
Governance	-
Annual Symposium/Events	£5,000
National Youth Advisory Board	£65,000
Travel	£10,000
<b>Raising Funds</b>	
Expenditure on Raising Donations & Legacies	£50,000
Expenditure on Other Trading Activities	£10,000
Catering	£50,000

Centralised Resource / Costs	Scenario One Phase One
<b>Expenses</b>	
Staff	363,000
Benefits	£25,410
Marketing	£120,000
Utilities	-
Insurance	£100,000
Security	£25,000
Maintenance & facilities	£184,650
Other	-
<b>Total</b>	<b>£1,053,060</b>

## Notes

- Phase One Direct Programming Expenditure is based on Scenario One capital costs and activity (ie. Number of commissions);
- Expenditure on Charitable Activities, Raising donations and legacies and Other trading activities exclude staff costs (presented separately);
- Staff costs include 13.5FTE with the assumption that these staff will be expected to deliver a similar scope of work into phases two and three;
- Benefit costs are assumed at 7% of staff costs
- There will be economies of scale if all three phases are delivered – e.g. centralised core staff recruited in phase one will include a director, who will then be responsible for delivering phases two and three as well;
- Centralized core staff also include a Head of Fundraising and a Head of Marketing – both roles of which would be expected to develop a programme of activity that extends to phases two and three;
- Indicative marketing costs are modeled at a minimum of 4% of total outgoings;
- Maintenance & facilities costs for Phase One/ National Canvas are based on 10% of total capital costs for installing commissions;
- There will be economies of scale if all three phases are delivered – e.g. centralised core staff recruited in phase one will include a director, who will then be responsible for delivering phases two and three as well;
- Centralized core staff also include a Head of Fundraising and a Head of Marketing – both

- roles of which would be expected to develop a programme of activity that extends to phases two and three;
- Centralized staff will be drawn upon for phases one and two.

Figure 45: Indicative centralised resource / operational costs for scenario one, phase one

# Preliminary Operational Costs

Centralised Resource / Costs	Scenario One Phase Two
<b>Charitable Activities / Direct Programming Expenses</b>	
Exhibitions	£250,000
Collections & Research	£64,000
Public Programmes	£20,000
Education / School Tours	£32,000
Fellowship Programme	£125,000
Museum Operations	-
Governance	£1,000
Annual Symposium/Events	£5,000
National Youth Advisory Board	£10,000
Travel	£16,000
<b>Raising Funds</b>	
Expenditure on Raising Donations & Legacies	£32,000
Expenditure on Other Trading Activities	£36,000
Catering	-

Centralised Resource / Costs	Scenario One Phase Two
<b>Expenses</b>	
Staff	£751,520
Benefits	£52,606
Marketing	£15,000
Utilities	-
Insurance	-
Security	-
Maintenance & facilities	£240,000
Other	-
<b>Total</b>	<b>£1,650,126</b>

## Notes

- Expenditure presented here is based on 8 galleries in the distributed model. The expectation is that not all will be opening the same year, so costs may be allocated across several years;
- Phase Two Costs are to be distributed across gallery partners; This includes additional staff resource;
- Indicative exhibition costs are notably higher than the Amgueddfa Cymru's total exhibition fund; this indicative budget presented here is an 'ideal' scenario based on comparable institutional benchmarks and the ambition outlined in this study;
- The expectation is that some exhibitions developed in partner galleries (Phase two) or the HQ (Phase three) will then tour the national (and international) circuit;
- Expenditure on Charitable Activities, Raising donations and legacies and Other trading activities exclude staff costs (presented separately);
- Indicative marketing costs are modeled at a minimum of 4% of total outgoings;
- Model assumes that Phase two / Distributed Gallery costs will be covered significantly by the existing gallery;
- Benefit costs assumed at 7% of staff costs;
- Centralised staff will be drawn upon for phases one and two.

Figure 46: Indicative centralised resource / operational costs for scenario one, phase two

Phil Collins, This Unfortunate Thing  
Between Us (2014). Site specific installation  
at Chapter Arts Centre. Image courtesy the  
artist.  
Source: Alex Vann



## Recommended Next Steps









# Recommended Next Steps

Event recommends the following actions are pursued at the next stage:

## Financing

A fundraising feasibility study – for both capital and revenue support – is critical if the National Contemporary Art Gallery Wales is to be pursued. This is to both ensure ongoing support is a realistic prospect, to explore how a national operating model will impact (positively and negatively) existing funding streams designated for visual arts in Wales, and to unlock new funding streams. Key areas for exploration include endowment from the Welsh diaspora, rewards-based crowdfunding, impact investment, bespoke corporate sponsorship packages, venture philanthropy, among others.

## Market development, testing and research

Undertake market research that will:

- Characterize and segment existing and potential contemporary visual arts and cross-arts audiences – including demographics, motivations, needs, behaviours, barriers and opportunities;
- as well as regional differences and similarities. Key categories will be aligned where possible with existing venue-specific studies and other data-collection programmes already in existence (e.g. Arts Council of Wales; VisitWales; G39/ Nesta R&D Project);
- Quantify the potential and existing

cultural tourism market – specifically domestic and cross-border markets, aligned with VisitWales demographics and parameters (where appropriate);

- Enable visual arts organisations to position themselves individually and collectively (as a cohesive sector) to an identified range of target markets;
- Explore and define the appetite and demand for a national centre of contemporary art;
- Inform the underlying operating and financial model for the Feasibility Study for a National Centre of Contemporary Art for Wales;
- Ensure results can be applied to other initiatives (e.g. individual organisations currently lack the visitor insight to make cross-site comparisons or build joint-marketing initiatives; the cultural tourism market could be better integrated into VisitWales positioning);
- Provide opportunity for skills development in research design, delivery and analysis; sector-wide knowledge exchange; and joined up strategic thinking.

There is also opportunity to further build-in buy-in for any feasibility concepts being developed for a national visual arts entity if and as the study moves forward.

## Operating Model

- The development of a detailed operating model that takes account of attendance figures, spatial requirements, operating costs and governance;
- A fundraising feasibility study (as above) to inform revenue projections;
- Primary audience research to inform visitor numbers and profile, opportunities for engagement, scale, relationship to formal learning, the operating model, positioning and marketing, the case for support and suitable location(s). This could include audience focus groups.

## Locations

- A call for partners through the development of an application process for partners for all three Gallery phases: The National Canvas (100 commissions); The Distributed Gallery (6-8 branded spaces); and The National Headquarters;
- A locations study requiring a comprehensive site analysis. Locations to consider highlighted to Event by consultees during the study include: Old College, Aberystwyth; Golden Grove; Carmarthen, Chapter, Cardiff; Mamhilad, Pontypool; Port Talbot.

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**“At a time like this it would be easy to say that we cannot afford to invest in culture, that it is some kind of ‘luxury spending’ that can no longer be justified. To adopt that approach would be a serious mistake. Culture is important, and has intrinsic worth. But we should also recognise its growing value to our economy, and the vital contribution that it can make in the effective delivery of other areas of public policy.”**

**Light Springs through the Dark: a vision for culture in Wales**

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**“The aspirational underpinning the government felt we should signal as our ambition [at the time of devolution] can be captured in the phrase: ‘Wales: The Smart Nation’... If we are ever to be that smart nation, we will have to propagate ‘Wales: the Arts Nation’. That is the real territory, in global terms, where we will need to state the claim for Wales.”**

**Professor Dai Smith, Arts in Education**





## Appendices

[illegible]



# Appendix 1: Consultation List

## Arts and Culture Organisations

1. Louise Amery, Deputy Director, Aberystwyth Art Centre
2. David Anderson, Director-General, Amgueddfa Cymru\*
3. Emma Balch, Director, The Story of Books
4. Hannah Barry, Bold Tendencies, London
5. Chris Brown, Founder, G39 and Deputy Chair, Visual Arts Galleries of Wales (VAGW)
6. Simon Burgess, General Manager, Craft in the Bay / Makers Guild in Wales
7. Elaine Cabuts, Chair Llantarnam Grange Arts Centre
8. Christopher Caitling, Secretary, RCAHMW
9. Alfredo Cramerotti, Director, MOSTYN
10. Devinda De Silva, Head of Collaboration, National Theatre Wales
11. David Drake, Director, Ffotogallery
12. Lisa Edgar, Education Manager, Ffotogallery
13. Hannah Firth, Deputy Director and Director of Visual Arts and Programme, Chapter
14. Andy Eagle, CEO, Chapter
15. Heledd Fychan, Head of Policy and Public Affairs, Amgueddfa Cymru
16. Jane Gerrard, Deputy Director, Ruthin Craft Centre
17. Cllr Russell Goodway, Cabinet Member for Investment and Development
18. Sara Green, Partner, Just Solutions and Consultant, National Football Museum

19. Neil Hanratty, Director of Economic Development, Cardiff Council
20. Peter Harding, Treasurer, Llantarnam Grange Arts Centre
21. Rob Holt, Deputy Director, Tourism Development & Major Events, VisitWales
22. Philip Hughes, Director, Ruthin Craft Centre
23. Alun Jones, Chairman, MOMA Machynlleth
24. Clive Jones, Chair, National Theatre Wales
25. Raymond Jones, Administrator, Machynlleth Tabernacle Trust
26. Steffan Jones-Hughes, Director, Oriel Davies and Chair, Visual Arts Galleries of Wales (VAGW)
27. Ruth Lambert, Director, MOMA Machynlleth
28. Janice Lane, Director of Gallery Development and Visitor Experience, Amgueddfa Cymru
29. Rhinanon Lowe, CCQ Magazine and Three Doors Up
30. Karen MacKinnon, Director and Curator, Artes Mundi
31. Jo Marsh, Creative Director, Ty Pawb / Wrexham Council
32. Robin Mitchell, Director, Mamhilad Arts Project
33. Frances Morris, Director, Tate Modern
34. Richard Nicholls, Development Director, Amgueddfa Cymru
35. Jim Orouke, Old Hall Aberystwyth Old

- College, Aberystwyth
36. Sarah Pace, Founder, Addo
37. Jill Piercy, Aberystwyth Art Centre
38. Hywel Pontin, Director, Llantarnam Grange Arts Centre
39. Mathew Pritchard, Chair, Artes Mundi
40. Andrew Renton, Keeper of Art, Amgueddfa Cymru
41. Elen Ap Robert, Director, Pontio
42. Nia Roberts, Director, Oriel Plas Glyn-y-Wedd
43. Amanda Roderick, Director, Mission Gallery
44. Victoria Rogers, President, Federation of Museums and Art Galleries of Wales and Director, Cardiff Story Museum
45. Richard Salmon, Director, Golden Grove Trust
46. Anthony Shapland, Artist and Director of G39
47. Tracy Simpson, Founder, Addo
48. Jenni Spencer-Davies, Curator, Glynn Vivian Art Gallery
49. Rebecca Spooner, Creative Director, Peak
50. Nick Thornton, Head of Fine Arts, Amgueddfa Cymru\*
51. Martin Tinney, Martin Tinney Gallery
52. Linda Tomos, National Librarian, National Library Wales
53. Robyn Tomos, Visual Arts Officer, Eisteddfod
54. Steve Ward, Chief Executive, The Riverfront Arts Centre, Newport
55. Neil Wicks, Director of Finance &

- Corporate Resources, Amgueddfa Cymru
56. Sarah Younan, Youth Engagement Coordinator, Amgueddfa Cymru
57. Representatives from Young Curators Forum, Amgueddfa Cymru

## Artists

58. Iwan Bala, Artist
59. Kelly Best, Artist
60. Holly Davey, Artist
61. Peter Finnemore, Artist
62. Laura Ford, Artist
63. Bob Gelsthorpe, Artist
64. Samuel Hasler, Artist
65. Mary Lloyd Jones, Artist
66. Shani Rhys James, Artist
67. Len Massey, Artist, MAP representative
68. Bedwyr Williams, Artist
69. Thomas Williams, Artist and Chapter Gallery Assistant
70. William Wilkins, Artist and Trust Artistic Adviser, Derek Williams Trust
71. JocJonJosch, Visual Arts Collective

## Funding Bodies

72. Nick Capaldi, Chief Executive, Arts Council of Wales\*
73. David Alston, Arts Director, Arts Council of Wales\*
74. Louise Wright, Portfolio Manager, Arts Council of Wales
75. Dr. Kath Davies, Director of Investment and Funding Services, Arts Council of Wales\*

# Appendix 1: Consultation List

## Specialists

- 76. Sophia Bardsley Deputy Director, Contemporary Art Society
- 77. Shôn Dale-Jones, Artistic Director, Hoipolloi Theatre
- 78. Dr. Elaine Davey, Architectural Historian
- 79. Alexander Branczik, Head of Contemporary Art Europe, Sotheby's, London
- 80. Mairi Mackay, Head of Global Social Enterprise, British Council
- 81. Neil Richardson, MAP representative
- 82. Fran Sanderson, Director, Arts & Culture Investments and Programmes, Nesta
- 83. Greg Shickle, Head of Platforms, Wavemaker
- 84. Ben Street, Lecturer in Contemporary Art
- 85. Peter Wakelin, Former Secretary, RCAHM

## Government and Local Authorities

- 86. Ruth Cayford, Visual Arts Manager, Cardiff Council and VAGW member
- 87. Lord Dafydd Elis-Thomas, Minister for Culture, Tourism and Sport, Welsh Government
- 88. Rob Holt, Deputy Director, Tourism Development, VisitWales
- 89. Lesley-Anne Kerr, Head of Museums Development, Museums Archives and Libraries Division, Welsh Government\*
- 90. Peter Owen, Head of Arts Policy Brand, Welsh Government\*
- 91. Adam Price, Plaid Cymru Assembly

Member for Carmarthen East and Dinefwr

- 92. Mari Stevens, Director of Marketing, VisitWales

## Higher Education

- 93. Angie Dutton, Research and Enterprise Coordinator, Cardiff School of Art and Design, Cardiff Met University
- 94. Gaynor Kavanagh, Professor Emeritus, Cardiff Metropolitan University
- 95. Professor Olwen Moseley, Dean of Art and Design Faculty, Cardiff Met University
- 96. Sara Pepper, Director of Creative Economy, Cardiff University
- 97. Professor Alec Shepley, Academic Head, School of Creative Arts and Professor of Contemporary Art Practice, Wrexham Glyndŵr University
- 98. Professor Mike Tooby, Professor of Art and Design, Bath University



Consultations, held at Arts Council of Wales, Oriel Davies, Newtown, and National Museum Cardiff  
Source: Event, January - April 2018

## Appendix 2: Site Visits

### Arts and Cultural Venues Wales

1. Arcadecardiff, Cardiff
2. Aberystwyth Art Centre Gallery, Aberystwyth
3. Cardiff Story Museum, Cardiff
4. Chapter, Cardiff
5. Craft in the Bay / Makers Guild in Wales, Cardiff
6. Cyfarthfa Park & Museum, Merthyr Tydfil
7. Ffotogallery, Cardiff
8. National Museum Wales, Cathay's Park, Cardiff
9. G39, Cardiff
10. Glyndwr University, Wrexham
11. Glynn Vivian Art Gallery, Swansea
12. Llantarnam Grange Arts Centre, Cwmbran
13. Mamhilad, Pontypool
14. Martin Tinney Gallery, Cardiff
15. Mission Gallery, Swansea
16. MOMA Machynlleth, Machynlleth
17. MOSTYN, Llandudno
18. National Library Wales, Aberystwyth
19. Newport Museum and Art Gallery, Newport
20. Old College, Aberystwyth
21. Oriel Davies, Newtown
22. Oriel Plas Glyn-y-Weddw, Pwllheli
23. Oriel Ynys Môn (Anglesey's Centre for Art and History)
24. Pontio, Bangor
25. The Riverfront Arts Centre, Newport
26. Ruthin Craft Centre, Ruthin
27. Storiol / Oriel Bangor Gallery, Bangor

28. Three Doors Up, Cardiff

29. Ty Pawb, Wrexham

30. Whitewall Galleries, Cardiff

### Arts and Cultural Venues Beyond Wales

31. Design Museum, London

32. Fundación Louis Vuitton, Paris

33. Hayward Gallery, London

34. Palais de Tokyo, Paris

35. Serpentine Gallery, London

36. Tate Modern, London

37. Turner Contemporary and The Waste Land Research Group projects associated with Journeys with 'The Waste Land', Margate



Glynn Vivian, Swansea  
Mission Gallery, Swansea  
Storiol, Bangor  
Source: Event, 2018



Arcade Cardiff, Cardiff  
G39, Cardiff  
Chapter, Cardiff  
Source: Event, 2018



## Appendix 2: Site Visits



Mamhilad, Pontypool  
The Riverfront, Newport  
Newport Museum and Art Gallery, Newport  
Source: Event, 2018



Old College, Aberystwyth  
Aberystwyth Arts Centre, Aberystwyth  
National Library of Wales, Aberystwyth  
Source: Event, 2018



Cyfarthfa Park & Museum, Merthyr Tydfil  
Oriol Davies, Newtown  
Llantarnam Grange Arts Centre, Cwmbran  
Source: Event, 2018



Ty Pawb, Wrexham  
Pontio, Bangor  
Plas Glyn y Weddw, Pwllheli  
Source: Event, 2018

## Appendix 3: Bibliography

The following reports and studies have been identified and have contextualised Event's work during the study:

- "A monumental spot of local trouble" The Independent. (J. Glancey, January 1995)
- Area Profile Reports, Arts Council of Wales (2014)
- A Museums Strategy for Wales (CyMal, Museums Archives and Libraries Wales 2010)
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## Appendix 5: The Market





## Appendix 5: The Market

### Wales Context

Wales is the second smallest of the home nations of the four parts of the United Kingdom. It shares its eastern border with England and is bordered by the Irish Sea to the north and west and the Bristol Channel to the south.

The latest available population estimate for Wales indicates that approximately 3.1m people live in Wales (Figure 48).<sup>1</sup> This is approximately 1 in 20 people in the UK.<sup>2</sup> It equates to 1.3 million households across the nation (2016).<sup>3</sup>

Wales comprises nearly 2.1m hectares of land, of which, 80% is used for agriculture.<sup>4</sup> The largest urban areas are Cardiff (361,500 people), Swansea (244,500 people) and Newport (149,100 people) (mid 2016).<sup>5</sup> Figure 49 shows the proportion of the population living in largely rural (one-third of the population) and urban areas.

pproximately 2.3m of the total population live in the south of Wales (Figures 47 and 50)

1 <http://gov.wales/statistics-and-research/mid-year-estimates-population/?lang=en>

2 <https://stats.wales.gov.wales/Catalogue/Population-and-Migration/Population/Estimates>

3 <https://stats.wales.gov.wales/Catalogue/Housing/Households/Estimates>

4 <http://gov.wales/statistics-and-research/welsh-agricultural-statistics/?lang=en>

5 <http://gov.wales/statistics-and-research/mid-year-estimates-population/?lang=en>

According to the 2011 census, 18% (563,000) of the population were aged 65 and over, and 6% (178,000) of the population in Wales were children under five.<sup>6</sup>

27% (837,000) of the total population of Wales was born outside Wales and of this figure 76% were born in England (2011).<sup>7</sup>

In January 2017 there were 1,547 maintained schools, and approximately 467,000 pupils. 475 schools teach in Welsh.<sup>8</sup> There were 128,005 enrolments at higher education institutions in Wales in 2016/17.<sup>9</sup> Those studying creative arts and design (across 10 out of 13 universities) account for 6% of this number.<sup>10</sup>

6 "2011 Census: Key Statistics for Wales, March 2011" (PDF). Ons.gov.uk. Retrieved 23 December 2012. [http://webarchive.nationalarchives.gov.uk/20160108131743/http://www.ons.gov.uk/ons/dcp171778\\_290982.pdf](http://webarchive.nationalarchives.gov.uk/20160108131743/http://www.ons.gov.uk/ons/dcp171778_290982.pdf)

7 "O2011 Census: Key Statistics for Wales, March 2011". Ons.gov.uk. March 2011. Retrieved 9 January 2016. <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/2011censuskeystatisticsforwales/2012-12-11#tab---Usual-residents-born-outside-the-UK>

8 <http://gov.wales/statistics-and-research/schools-census/?lang=en>

9 <https://www.hesa.ac.uk/data-and-analysis/students/table-13#note>

10 <http://gov.wales/statistics-and-research/students-higher-education-institutions/?lang=en>

Wales had the lowest GVA per head at £19,140 but its growth per head between 2015 and 2016 was the highest of the UK nations at 3.5%. It is also the fastest growing of the UK nations (1.9%) when inflation is taken into account. But Wales' GVA is still behind Northern Ireland on £19,997 per head; Scotland on £24,800 and England with £27,108<sup>11</sup> (Figure 52).

11 The Office for National Statistics (ONS) has published regional gross value added (GVA) figures for 2016, which measures how much money is generated through goods produced and services delivered.

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Location	Population
WALES	3,113,150
Isle of Anglesey, Gwynedd, NW	69,723
Gwynedd, Gwynedd, NW	123,627
Conwy, Clwyd, NE	116,538
Denbighshire, Clwyd, NE	94,805
Flintshire, Clwyd, NE	154,419
Wrexham, Clwyd, NE	136,710
Powys, Powys, Mid / E wales	132,160
Ceredigion, Dyfed, SW	74,146
Pembrokeshire, Dyfed, SW	123,954
Carmarthenshire, Dyfed, SW	185,610
Swansea, W Glamorgan, SE	244,513
Neath Port Talbot, W Glamorgan, SE	141,588
Bridgend, Mid Glamorgan, SE	143,177
Vale of Glamorgan, South Gla-morgan, SE	128,463
Cardiff, South Glamorgan, SE	361,468
Rhondda Cynon Taf, Mid Glamorgan, SE	238,306
Merthyr Tydfil, Mid Glamorgan, SE	59,810
Caerphilly, Gwent, SE	180,462
Blaenau Gwent, Gwent, SE	69,628
Torfaen, Gwent, SE	92,052
Monmouthshire, Gwent, SE	92,843
Newport, Gwent, SE	149,148

Figure 47: Population estimates by local authorities  
Source: Office for National Statistics, Mid-2016



Figure 48: Population and Area, The Countries of the UK  
Source: Event, Office for National Statistics, National Records of Scotland,

Northern Ireland Statistics and Research Agency, June 2016

Area in Wales	% of the population
Rural	32.7
Valleys	20.6
Cities	24.1
Mixed	22.6

Figure 49: Percentage of Welsh residents by area type  
Source: Office for National Statistics, 2015

**UK population estimate: 65,648,100**  
Share of UK population:

- England 84.2%
- Scotland 8.2%
- Wales 4.7%
- Northern Ireland 2.8%

# Appendix 5: The Market

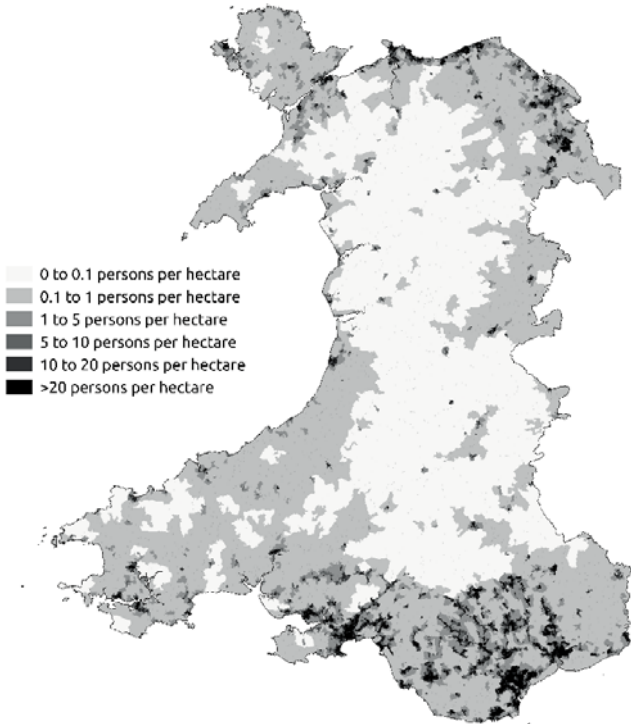


Figure 50: Population density Wales  
Source: Office for National Statistics, 2011 Census

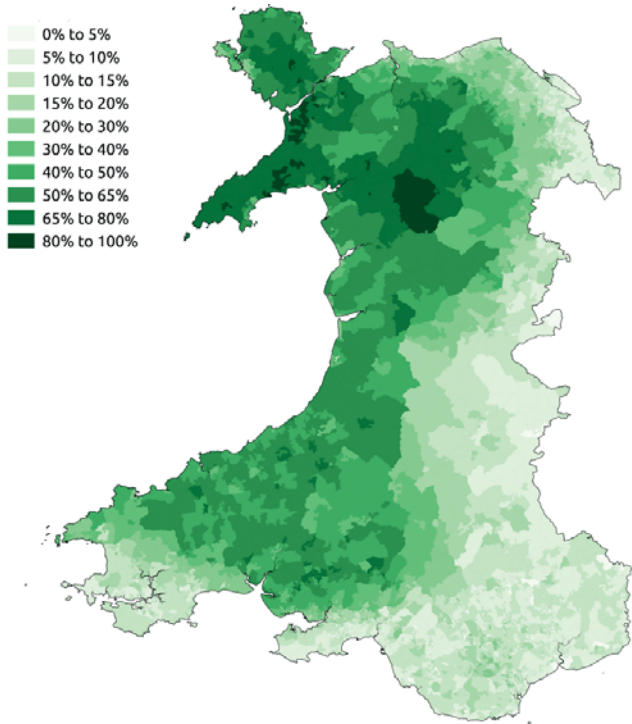


Figure 51: Percentage of Welsh speakers in the area  
Source: Office for National Statistics, 2011 Census

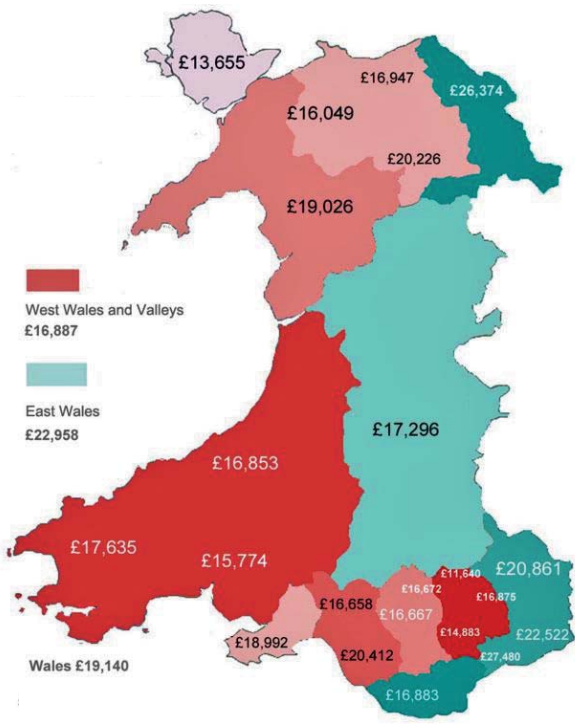


Figure 52: Gross Value Added per head (2016)  
Source: Office for National Statistics, December 2017

## Appendix 5: The Market

### Tourist Market

This section highlights three tourist markets that are potentially lucrative for any new national contemporary art market to target, given their motivations for visiting Wales and projected spend – Overseas Tourist market, Domestic Tourist Market, comprising UK Day Visitors and UK Staying Visitors.

### Overseas tourist market

Wales has strong appeal for international travellers, in a recent survey 29% of people choose Wales as their main destination. 2/3 of international holidaymakers are more interested in coming to the UK for a vacation with the weakness of the pound (and therefore higher spending power) cited as major factor.<sup>1</sup>

International visitors are a relatively high spending market but historically have been of lower importance for Wales, accounting for just 8% of all staying trips and 16% of all staying visitor expenditure. Scotland, Ireland and the English regions attract significantly more international visitors than Wales. As a result, Wales' market share of all international trips has been gradually falling from 3.6% to 2.7% and share of spending from 2.15% to 1.86% between 2002 and 2012.<sup>2</sup>

<sup>1</sup> <https://www.walesonline.co.uk/business/business-opinion/how-tourism-can-shining-star-12991526>

<sup>2</sup> <http://gov.wales/docs/drah/publications/130613-partnership-for-growth-en.pdf> p15

Marketing activity funded by Visit Wales is focused on three main international markets – Ireland, Germany and USA and Canada – within The Welsh Government Strategy for Tourism 2013-2020: Partnership for Growth.<sup>3</sup>

The majority of international tourists are fairly young, aged 35-54 (43%) and fall into the ABC1<sup>4</sup> social classes in the visitor profile, especially among visitors from North America (88%).

Wales also attracts international couples (34% in 2016) and families with young children 14%<sup>5</sup> and since 2013 there has been an increase in repeat visitation (from 21% to 33%), with more people visiting 2-6 times in the last three years (from 16% to 29%).<sup>6</sup> Thus it is unsurprising that Wales is primarily a holiday destination rather than a short-break destination, with three-

<sup>3</sup> <http://gov.wales/docs/drah/publications/130613-partnership-for-growth-en.pdf> p15

<sup>4</sup> Socio-economic classification is determined by establishing an individual's job title and position and social grades are defined as follows:

AB: Higher and intermediate managerial, administrative and professional occupations

C1: Supervisory, clerical and junior managerial, administrative and professional occupations

C2: Skilled manual workers

DE: Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only

<sup>5</sup> Full Research Report: McAllister; McDonough ; 08 March 2017.Wales Visitor Survey 2016 Report: Overseas Visitors. Cardiff: Welsh Government, GSR report number 14/2017 <http://gov.wales/statistics-and-research/wales-visitor-survey/?lang=en>

<sup>6</sup> Ibid

quarters of overseas visitors coming for a holiday (62% main holiday, 12% secondary holiday) while around a fifth (21%) came for a short break.<sup>7</sup> Although there were 9.3m overnight tourist trips to Wales by GB residents in 2016.<sup>8</sup>

Visitors come for the Welsh countryside and landscape and to visit places and attractions. Most popular activities in Wales include: visiting a castle or historic attraction (43%), general sightseeing (38%), visiting a museum or heritage centre (33%), visiting the beach (31%). 9% of all overseas visitors visited an art gallery or exhibition.<sup>9</sup> It is unclear if this disproportionately low figure (9%) is due to the fact that art galleries are not currently prioritised in Welsh marketing materials; if those currently being targeted are uninterested in art galleries and there is a requirement to target those markets with an interest; or if visual art galleries simply are not an attraction.

Sense of place is a key driver for international tourists with the great majority of overseas visitors considering that some aspect of their visit included features that

<sup>7</sup> Ibid

<sup>8</sup> <http://gov.wales/statistics-and-research/great-britain-tourist-survey/?lang=en>

<sup>9</sup> Full Research Report: McAllister; McDonough ; 08 March 2017.Wales Visitor Survey 2016 Report: Overseas Visitors. Cardiff: Welsh Government, GSR report number 14/2017 <http://gov.wales/statistics-and-research/wales-visitor-survey/?lang=en>

were distinctively Welsh or that they could not have found elsewhere (in particular Wales' heritage sites and visitor attractions).<sup>10</sup>

Most overseas visitors (42%) highlighted the importance of seeing or hearing the Welsh language, with an even larger majority (82%) saying it is important that their trip gives them an experience distinctive to Wales and that they couldn't have found anywhere else.<sup>11</sup>

### Domestic tourist market

The GB domestic market is the primary market for Wales and is the main focus for marketing activity.

In the 12 months ending July 2017, there were 10m tourism day visits to Wales, with an associated spend of £4,874m. The number of visits has increased 11% compared to the 12 months ending July 2016, while the amount spent has increased 51%. Wales' performance is particularly strong in the GB context: for GB as a whole, the number of visits has decreased by 1% compared to the 12

<sup>10</sup> Full Research Report: McAllister; McDonough ; 08 March 2017. Wales Visitor Survey 2016 Report: Overseas Visitors. Cardiff: Welsh Government, GSR report number 14: When asked whether any aspects of their visit included features that were distinctively Welsh or had a particular local character, heritage sites and visitor attractions were each chosen by around half of overseas visitors as setting Wales apart from other destinations (49% and 45% respectively).

<sup>11</sup> Ibid

## Appendix 5: The Market

UK Region	Population Estimate
UK	65,648,054
England	55,268,067
North East	2,636,589
North West	7,223,961
Yorkshire and the Humber	5,425,370
East Midlands	4,725,390
West Midlands	5,810,773
East	6,129,005
London	8,769,659
South East	9,030,347
South West	5,516,973

Figure 53: Regional population estimates  
Source: Office for National Statistics  
(mid-2016)

months ending July 2016, while the amount spent has increased 5%.<sup>12</sup>

Wales continues to have a core market in domestic holiday visitors, with the main regions of origin for holiday and other trips to Wales continuing to be from Wales itself and the adjacent regions of North West and West Midlands, which account for more than half of all domestic trips and spend to Wales. It is worth noting this cross-border tourist market as the north west and west midlands has a population of (Figure 53).<sup>13</sup>

Moreover, there are 13 urban areas that exceed 500,000 inhabitants in the UK. At least 8 of them are less than 2 hours from the Welsh border by car or train, including London, Birmingham, Leeds and Bradford, Sheffield, Liverpool, Manchester, Bristol. Visit Wales marketing activity is being focused on holiday makers from London and the South-East, East Midlands, Yorkshire and the South West.<sup>14</sup>

During the period between January and December 2017 there were 9.02m trips to

<sup>12</sup> <http://gov.wales/newsroom/culture-tourism-sport/2017/170912-huge-increase-in-visitor-spending-in-wales/?lang=en>

<sup>13</sup> <http://gov.wales/topics/culture-tourism-sport/tourism/?lang=en> <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorthernireland>

<sup>14</sup> <http://gov.wales/docs/drah/publications/130613-partnership-for-growth-en.pdf> p15

Wales by overnight domestic visitors, a 3.0% decrease when compared to the previous year. Similarly spend also decreased by 3.6% to £1,628m.<sup>15</sup>

Levels of trips and nights in Great Britain by British residents have increased slightly during January to December 2017 when compared to January to December 2016; trips increasing by 1.0% to 120.68m and nights by 2.8% to 369.46m. Over the same period, the level of related expenditure increased by 2.6% to £23,683m.

### UK Day Visitors

Approximately one-third of day-trippers come from outside Wales (32%).<sup>16</sup>

Wales continues to attract day-tripping families and couples.<sup>17</sup> In 2016, there was an increase in the number of 16-34 year old day-trippers, coinciding with a drop in over 55s. Day visitors tended to be middle classes, making up 65% of those taking a day trip to and in Wales and an even higher proportion amongst visitors from England in 2016 (72%). ABC1s make up 53% of the UK population.<sup>18</sup>

<sup>15</sup> <http://gov.wales/docs/statistics/2018/180405-gb-tourist-statistics-january-2017-december-2017-en.pdf>

<sup>16</sup> Full Research Report: McAllister; McDonough ; 08 March 2017. Wales Visitor Survey 2016 Report: UK Day Visitors. Cardiff: Welsh Government, GSR report number 14/2017

<sup>17</sup> Full Research Report: McAllister; McDonough ; 08 March 2017. Wales Visitor Survey 2016 Report: UK Day Visitors. Cardiff: Welsh Government, GSR report number 14/2017

<sup>18</sup> Ibid

Levels of repeat visits are high, with 89% of UK day visitors having taken a day trip in and to Wales more than once in the last year.<sup>19</sup> Most often, day trippers are coming for Wales' countryside and to visit places and attractions. Main activities include: general sightseeing (25%), visiting a castle or historic attraction (22%), visiting country and forest parks (20%), and visiting the beach (19%). A quarter of UK day visitors in 2016 were in Wales to take part in outdoor or sporting activities; those visiting a museum or heritage centre (18%) and those visiting an art gallery is as low as 5%.<sup>20</sup> *The question associated with this is why? Is it that these sites are not being marketed sufficiently in the UK or that there is not enough interest in the visual and applied arts?*

For the vast majority (86%). of UK day-trippers who lived outside of Wales there is a clear reliance on car travel to get to Wales, with only 6% using public transport (3% train; 3% public bus or coach).<sup>21</sup> This is reflected in the prevalence of those traveling to their destination by car (84%). Just under one in ten used public transport (6% bus or coach, 3% train).<sup>22</sup>

There are clear regional differences regarding the types of places visited. In SE

<sup>19</sup> Ibid

<sup>20</sup> Ibid

<sup>21</sup> Ibid

<sup>22</sup> Ibid



## Appendix 5: The Market

Wales, two fifths of day visitors visited a museum or heritage centre on their trip (40% cf. 34% overall) while in SW Wales, over two fifths visited a nature-based attraction (42% cf. 22% overall). In contrast, around six in ten of day visitors to North and South West Wales were visiting to enjoy the landscape / countryside / beaches (63% and 66% respectively cf. 54% all Wales average). Visitors to Mid and South West Wales were also more likely to mention taking part in outdoor activities as their reason for visiting (29% and 35% respectively cf. 25% all Wales average).<sup>23</sup>

### UK Staying Visitors

The vast majority of UK staying visitors live in England (84%), with only 14% living in Wales and 3% in Scotland and Northern Ireland.<sup>24</sup> The staycation trend has supported the attraction sector.<sup>25</sup>

UK holiday makers are most likely to be aged 35-54 and fall into the ABC1 social cases, even more so amongst visitors from England. Although there has been an increase in the proportion of 16-34s coming to Wales, the overall representation of younger people visiting Wales continues to be lower than the proportion of younger

adults visiting the UK.<sup>26</sup> Looking at their home region, there is a significantly higher proportion of younger visitors (20%) and lower a representation of older people aged 55+ coming from England (39%) compared to Wales (13% 16-34; 47% 55+).<sup>27</sup>

Wales continues to attract couples and families.<sup>28</sup> Roughly equal proportions having visited once in the last three years (31%), 2-3 times (31%) or 4 times or more (38%).<sup>29</sup>

Wales is primarily a short-break destination for UK visitors. Just over half UK staying visitors came for a short stay (55%), while around two fifths (41%) visited for a longer holiday. A quarter of people overall said their trip to Wales was their main holiday of the year.<sup>30</sup>

Almost one in three UK staying visitors in 2016 came to take part in outdoor or sporting activities and approximately 10% said this was their main motivation. As with the other markets, UK holiday makers' primary reasons for coming to Wales were its landscape and to visit places and attractions. The most popular activities included visiting the beach (42%), general

sightseeing (38%), visiting a castle or historic attraction (30%), visiting country and forest parks (31%), walking more than 2 miles (24%) and visiting a museum or heritage centre (24%). Visiting an art gallery or exhibition still remained low at 8%.<sup>31</sup>

<sup>23</sup> Ibid

<sup>24</sup> Full Research Report: McAllister; McDonough ; 08 March 2017. Wales Visitor Survey 2016 Report: UK Day Visitors. Cardiff: Welsh Government, GSR report number 14/2017

<sup>25</sup> Krishan Kawol, Tourism Research – Welsh Government. Tourist Attractions: Current Trends, Welsh Government Social Research, 2013

<sup>26</sup> Full Research Report: McAllister; McDonough ; 08 March 2017. Wales Visitor Survey 2016 Report: UK Staying Visitors. Cardiff: Welsh Government, GSR report number 14/2017

<sup>27</sup> Ibid

<sup>28</sup> Ibid

<sup>29</sup> Ibid

<sup>30</sup> Ibid

<sup>31</sup> Full Research Report: McAllister; McDonough ; 08 March 2017. Wales Visitor Survey 2016 Report: UK Staying Visitors. Cardiff: Welsh Government, GSR report number 14/2017  
Available at: <http://gov.wales/statistics-and-research/wales-visitor-survey/?lang=en>



## Appendix 6: Longlist Options

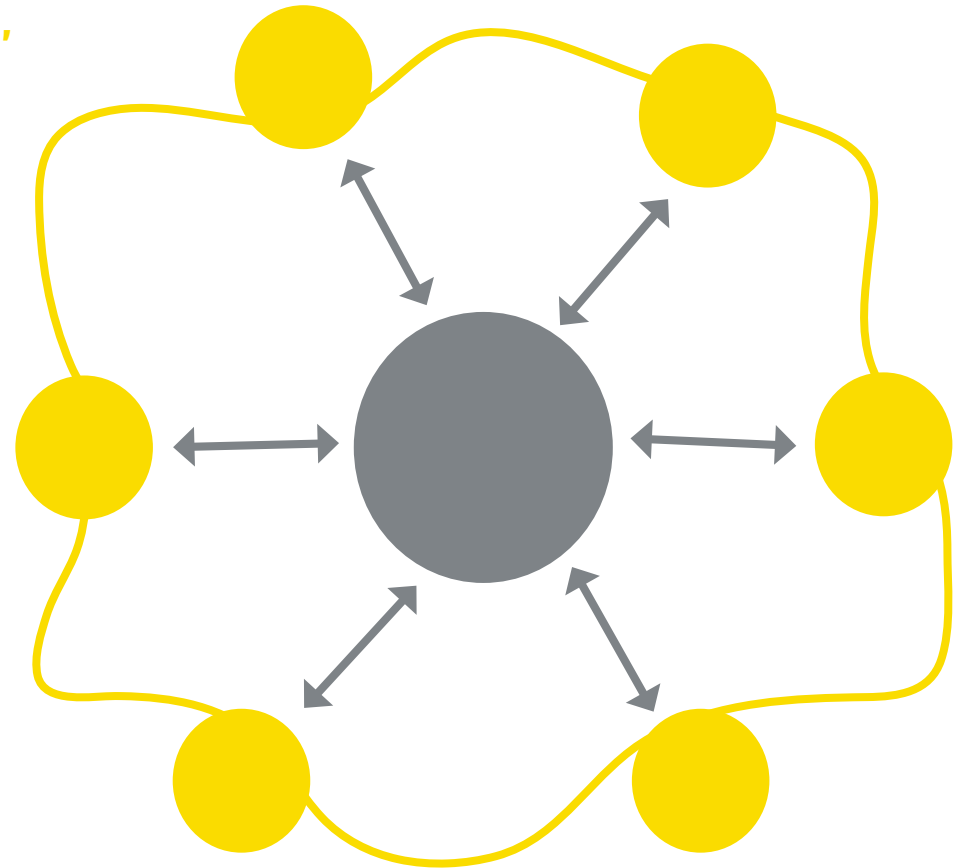


## Option 1: Sharing Contemporary Arts Partnership

“...The landscape is quite fragile. Whatever it is, it has to be something that contributes to the ecosystem in some way.” Arts Leader

“The collection should be dispersed as it belongs to everyone in Wales. It is a key objective in the [National] Museum to make their collection accessible as possible. There have been schemes like Sharing Treasures, which had a separate fund stream for shows across Wales.” Curator

“With something like Sharing Treasures there is a risk it won’t last. It can be cut too easily and can leave without a trace.” Curator





# Option 1: Sharing Contemporary Arts Partnership

## Model Description

A refreshed model that revisits and builds on the successes and learnings from the Sharing Treasures Programme (2002-2014/15). It encourages co-curation between partner sites and, through sufficient resource, ensures that visual art works from the national collection(s) are made available to a number of selected visual arts organisations across Wales.

As a second stage, UK organisations could be approached to extend to partners across the UK and to increase the visibility of the UK national collections in Wales.

As identified in the Sharing Treasures Review (2011), the Sharing Contemporary Arts Partnership (SCAP) could be delivered through three categories:

*Category 1 - Capital improvements to permanent or temporary galleries containing national loans. This should involve a three-year rolling programme to achieve optimum outputs. A two-stage bidding process would begin with a development phase to work up a full application which would include a facilities report so that plans are fully costed with achievable timetabling.*

*Category 2 - Development of touring exhibitions, either based on a temporary exhibition that was developed for a partner museum or on a group of partners working*

*with Amgueddfa Cymru or another organisation.*

*Category 3 - A few projects with good programming and support, based on the ArtShare model of longer term engagement. It is not expected that this category would include funding for major capital works.*

The original Sharing Treasures partners were primarily museums. SCAP is a partnership between organisations that focus on modern and contemporary visual art and design.

The members of the SCAP network would have opportunity to:

- Readily borrow works of art from the national collection, housed at Amgueddfa Cymru. This could be extended to include borrowing works of art from the national collection held at National Library Wales (NLW);
- Display a pre-curated exhibition with educational materials included;
- Co-develop exhibitions in partnership with any of the other members, drawing on works of art from the national collection;
- Recommend works for acquisition to the national collection;
- Share professional skills.

It is worth noting that some visual arts organisations in Wales already have the requisite environmental conditions to accept works from the national collection. However:

- The staff capacity for both partners (i.e. Amgueddfa Cymru and the recipient organisation) to process any such requests is severely limited;
- The cost to borrow works of art (i.e. insurance, transport, exhibiting) is often prohibitive;
- Crucially, and perhaps as a result of these limitations, Amgueddfa Cymru receives more requests for loans from outside of Wales than in.
- That said, governance influences had affected funding and implementation of Sharing Treasures. In some cases, key visual arts venues were unable to access Sharing Treasures due to the requirement to be an accredited museum, library or archive.

## Capital requirements

- As shown in the three categories above, partners in Category 1 are assessed to determine if they require capital uplift;
- Partners in Category 1, the capital cost is likely to be in the region of £4,000 per sqm.
- A preliminary budget might be anywhere from £1.9m for a refurbishment of a small site that includes a 300sqm temporary gallery, 100sqm exhibition storage and

60sqm Back of House (BoH), to £7m, for a large site that includes a 1,200sqm temporary gallery, 400sqm exhibition storage and 60sqm BoH space.

- Partners categorised in 2 and 3 do not require capital investment in the first instance.

## Operational components

### Leadership and Team

- Partner Committee made up of key staff at each of the sites ensures a coherent curatorial voice for joint exhibitions.
- A 'roaming' Arts Director provides a catalyst for new curatorial approaches and programming at each of the sites.
- Equal relationships across sites, rather than being 'dictated outward' from Amgueddfa Cymru.
- Extended capacity and clear dedicated staff time at Amgueddfa Cymru and partner sites in order to deliver the national collection programmes and associated education and community programmes.
- Potential for shared resource pool across visual arts ecology relying on anchor organisations for fundraising, marketing, conservation.
- Clear opportunities for professional skills development – both formal and informal.

### Programme and Exhibition

- Temporary exhibition installed regularly (6-8 different small exhibitions per



# Option 1: Sharing Contemporary Arts Partnership

- annum; or 2-3 large shows that are distributed across the multiple sites).
- Small temporary exhibitions rotate around the venues to ensure widest reach in terms of audiences.
- Of the temporary exhibitions, 1-2 larger joint curated temporary exhibitions designed to tour nationally / internationally.

## Collections Mobility

- Funding made available for transport, insurance and display.
- Medium logistics internally and low transport and insurance costs regarding collection movement (i.e. some of the permanent collection will still need to be de-installed when a temporary exhibition is shown at National Museum Cardiff).
- Externally, high costs associated with collections movement. Medium transport and insurance costs.

## Education and Engagement

- Onsite and online formal and informal learning. A coherent education offer across all sites.
- Early involvement of learning and marketing teams from the national museum and partner organisations to ensure that there is an integrated approach.
- Community “in-reach” required to extend audiences beyond those visiting. Co-curation with targeted groups. Formal

- engagement officers required.
- Clear understanding of local audiences at each venue to ensure audience needs and interests are being met

## Commercial Opportunities

- Catering, retail, events, hire personnel required.

## Marketing

- Emphasis on local, regional, national marketing and international tourism and cultural industry.

## Development

- Classically diverse fundraising strategy - trusts, foundations, individual donations and corporate sponsorship.
- Crowd-funding opportunities through locals funding the next programmes or loans to come to their area.

## Maintenance

- Security and insurance requirements at all sites.
- Maintenance requirements for outdoor artworks.

## Partners

- Visual art organisations can apply to formally participate in the scheme and are classified according to the three categories recommended above.
- Partners could be added regularly or an

annual basis, so long as staff capacity is scaled in tandem.

## Timescale

Year 1: Set up (6 months); recruit/identify key partners; assess capital requirements; establish curatorial decision-making committee; establish brand.

Year 2: Venues with suitable conditions could host touring shows.

Year 3: By year 3, 2-4 venues could be upgraded to accommodate category 1.

Year 4 on: Rolling programme of tours and upgrades.

## Option 1: Sharing Contemporary Arts Partnership

Added Value to Wales	
Extends the cultural tourism offer across Wales.	
Alleviates the Cardiff-centric concerns amongst non-Cardiff-based audiences and organisations.	
Results in small economic impact with combined supply-chain and induced spending in local area including construction employment	
Strengths	Weaknesses (note risks overleaf)
Ensures that the national collection is consistently mobile, providing greater and more democratic access to more people in Wales.	Lacks visibility unless well-marketed and branded.
Encourages a more joined-up, formalised strategic plan across Wales visual arts sector.	Without delivering the Category 1 capital investment the programmes risks being dismantled if funding decreases or is eradicated.
Requires low capital investment upfront and any capital investment could be staggered over time.	Possibly prohibits other works being shown simultaneously due to space constraints within the partner galleries.
Incrementally improves gallery conditions (size, environmental and security conditions) across Wales, resulting in the whole sector benefiting.	Potentially lacks components of a true national brand.
Builds upon a tried and tested model (through Sharing Treasures), which already has a set of recommendations to better the outcomes and evaluation.	
Ensures quick implementation - Category 2 and 3 programmes are easily implemented.	
Provides professional skills uplift to staff through partnership working.	
Can generate additional involvement and participation for local audiences, which can otherwise be isolated from such opportunities.	
Could work in parallel or sequenced with other models.	

## Option 1: Sharing Contemporary Arts Partnership

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Closely bound in heritage identity of the Amgueddfa Cymru.	Develop clear branding strategy at early stage; Creatively use Amgueddfa Cymru's heritage identity to the Partnership's advantage	3	2	6
Lacks components of a true brand and might be seen only as a programme being delivered by the Amgueddfa Cymru, rather than as a dynamic contemporary art gallery competing on an international stage	Recruit leadership and management with collaborative ethos, strong communication skills and ambitious vision; Develop clear branding strategy at early stage; Build appropriate marketing costs into operating model	3	4	12
Addresses access improvements in the gallery, rather than providing any requirements of an ambitious 21st century gallery	Ensure exhibitions and programming are ambitious and creatively use spaces in and outside galleries	5	2	10
Decelerated by bureaucracy / working cross departmentally at local authority level.	Put clear decision-making processes in place at programme outset; resource departments so they are able to deliver efficiently and effectively; Identify specific barriers at programme outset and find ways to address these through staff structures, communications and decision-making	4	4	16
<b>Risks drawn from the Sharing Treasures evaluation remain relevant:</b>				
Staff see delivering Sharing Treasures as an 'add on' to their existing job description, rather than integrated	Build buy-in for programme at early stage, working closely with all partners to understand if/how this integrates with existing job function and what additional resource would be required; Hold quarterly meetings with sector-wide team with clear agenda to discuss how programming is developing, where there are difficulties and how these can be addressed; Celebrate and promote successes of Partnership formally and informally – internally and externally	2	5	10
The programme exists only in the consciousness of the museum profession; There is no differentiating factor for audiences to grasp	Identify existing and target audiences and develop consistent communications; Develop clear brand identity at early stage; Build appropriate marketing costs into operating model	2	5	10
Lack of recognition from the Welsh Government	Track and measure success of programme – its impact audiences in particular; Celebrate and promote successes of Partnership externally	3	5	15

## Option 1: Sharing Contemporary Arts Partnership



Celf Cymru Gyfan – ArtShare Wales (The Cliff at Penarth, evening, low tide, SISLEY, Alfred, 1839 - 1899)



Cyfoeth Cymru Gyfan – Sharing Treasures

### Artist Rooms:

Leeds Art Gallery, Leeds, Joseph Beuys, 2018

Tate, Sol LeWitt, Wall Drawing #1136, 2004

BALTIC+ Anselm Kiefer: Palm Sunday, 2006

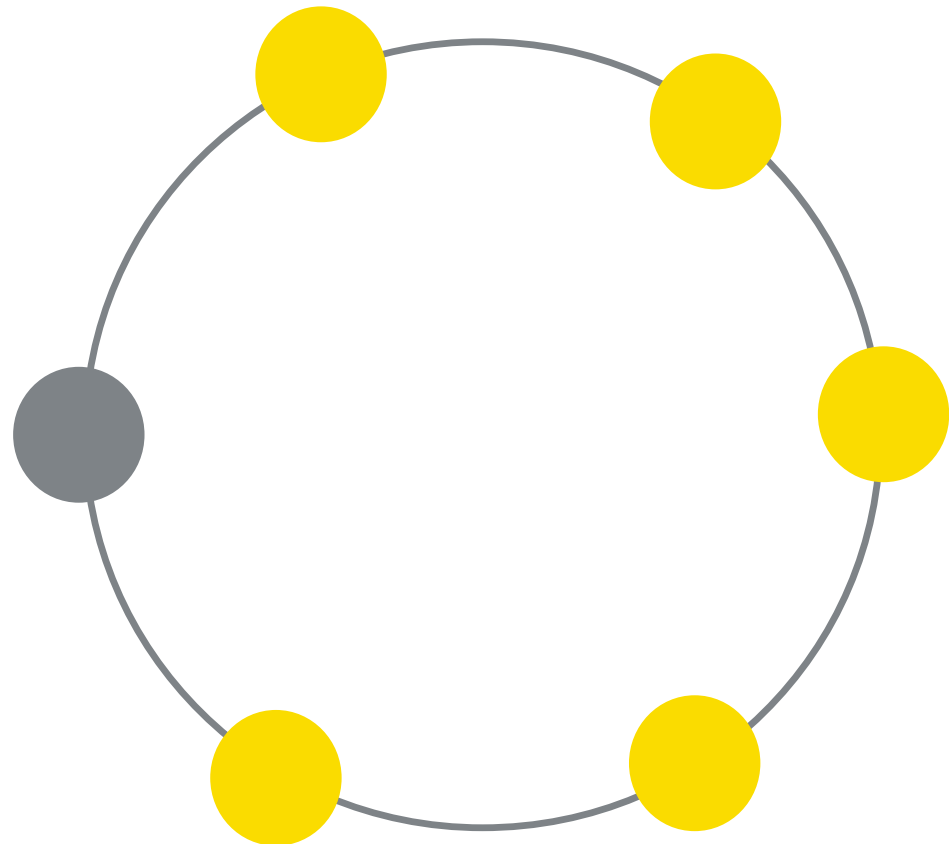
## Option 2: Charm Bracelet

**"A great deal to be said for a distributed approach. It's a sophisticated model that emphasises strength of existing collections and provide exhibitions that tour to strengthen venues as a national programme. Something could be co-curated by all of them. A distributed collection and distributed curating service."** Director

"Do people go to buildings? Do buildings need to change to get them to come in? If it is a grandiose building in Wales how can you provide access to the people of Wales. I'm in support of the spread out model." Director

"A distributed / extended national collection / gallery would be an excellent idea... because the landscapes and

seascapes of Wales have played such an important role in inspiring contemporary Welsh art that the art is perhaps best understood by being displayed within its landscape context - close to where it was made." Institution Director





## Option 2: Charm Bracelet

### Model Description

A select group of modern and contemporary visual art and design galleries (5-7 organisations) receive a semi-permanent extension to their physical site that is branded as the 'national contemporary art gallery.' A single curatorial programme threads its way through each of the associate sites. The galleries in the network would establish an equal partnership to work together to deliver a national body of work. Programmes could be showcased across the 'bracelet' in any number of formations (e.g. a programme or exhibition can move from one venue to the next; or could tell a story across all partner sites).

### Capital Requirement

New capital structure to be put in place at each venue; level of investment would vary based on size of structure, longevity and recent capital works (e.g. Glynn Vivian's 2016 extension, by way of example only, does not currently need a new physical structure; however as part of the network, a pop-up architectural solution could be put in place near to the site branded as the national contemporary art gallery). The capital cost for a semi-permanent extensions is likely to be iro £3000-£3500 per sqm.

A preliminary budget for a semi-permanent

small new extension would be £4.5million. This assumes approx. 480sqm public space, 300sqm of temporary gallery space, approximately 300sqm of collection storage and associated amenities and 300sqm BoH space.

A preliminary budget for a semi-permanent medium extension would be iro £8million. This assumes approx. 600sqm public space, 800sqm of temporary gallery space, approximately 600sqm of collection storage and associated amenities and 480sqm BoH space.

A preliminary budget for a semi-permanent large extension would be iro £13million. This assumes approx. 940sqm public space, 1300sqm of temporary gallery and community space, approximately 950sqm of collection storage and associated amenities and 830sqm BoH space.

### Operational components

#### Leadership and Team

- Curatorial committee that ensures a coherent curatorial voice for joint exhibitions.
- Equal relationships across venues, rather than being 'dictated outward' from Amgueddfa Cymru.
- Clear opportunities for professional skills development – both formal and informal.
- Extended capacity for delivering national

collection programmes and associated education and community programmes that meet the audience requirements of each associate venue (not a one size fits all approach to education and outreach).

- Robust marketing plan to ensure visibility and brand identity.
- Potential for shared resource pool across visual arts ecology relying on anchor organisations for fundraising, marketing, conservation.

### Programme and Exhibition at each venue

- Associate venues still offer their current programmes, but have a national collection/gallery designated as a physical space on (or near) site;
- Associate venues are expected and encouraged to ensure cohesive programme alignment between the 'national' and their independent work.

### Collections Mobility

- Minimal logistics internally and low transport and insurance costs regarding collection movement (i.e. permanent collection does not need to be de-installed when a temporary exhibition is shown assuming that Amgueddfa Cymru is automatically one of the sites that receives a semi-permanent extension).
- Externally, medium costs associated with collections movement. Medium transport and insurance costs.

### Education and Engagement

- Early involvement of learning and marketing teams from the national museum and partner organisations to ensure that there is an integrated approach. Onsite and online formal and informal learning. A coherent education offer across all sites.
- Clear understanding of local audiences at each venue to ensure audience needs and interests are being met.
- Community "in-reach" required to extend audiences beyond those visiting. Co-curation with targeted groups. Formal engagement officers required.

### Commercial Opportunities

- Catering, retail, and events personnel required.

### Marketing

- Emphasis on local, regional, national marketing and international tourism and cultural industry.

### Development

- Classically diverse fundraising strategy - trusts, foundations, individual donations and corporate sponsorship
- Necessity to quantify and cultivate Welsh diaspora.
- Potential to ensure Amgueddfa Cymru's new membership scheme deploys best practice in building membership community.

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## Option 2: Charm Bracelet

### **Building Maintenance**

- Consistent and predictable facilities, maintenance and security costs in line with industry averages.

### **Partners**

- 5-7 sites selected for their strategic alignment including:
- Geographical location and catchment
- Curatorial focus (e.g. Pontio /circus; Plasy Glyn/artist residences)
- Governance

### **Timescale**

Year one: Identify partners and establish curatorial committee; establish branding; assess capital opportunities at each partner venue

Year two-four: Establish curatorial programme; roll out capital extensions

Year five: Additional partners added according to identified assessment criteria

Ongoing: evaluation of programme (any venues that are not working to be addressed or removed) potential for further partners to be added.

## Option 2: Charm Bracelet

Added Value for Wales	
Extends the cultural tourism offer.	
Expresses confidence in the visual arts and raises its visual arts profile in and out of Wales.	
Alleviates the Cardiff-centric concerns amongst non-Cardiff-based audiences and organisations.	
Combined supply-chain and induced spending in local area including construction employment and potentially additional visitor spend.	
Strengths	Weaknesses (note risks overleaf)
Allows for a pilot phase to test what is working, where footfall or reach has increased at sites and how the idea might be scaled. More permanent structures could be put in place once worth proved.	Requires buy-in from planners and local authorities.
Ensures collection is widely distributed across Wales and unseen collections are made visible.	Not all visual arts organisations can participate.
Ensures 'national' is truly national and geographically dispersed.	It requires space beyond the existing building footprint.
Potential for different architectural interventions at each site, celebrating the uniqueness of each venue.	Creates increased competition for funding, particularly from foundations and trusts.
Allows for current partners' current programmes/displays to be delivered and exhibited; i.e. they do not need to be removed for the collection to be shown.	
Inspires dialogue and juxtaposition between partners' existing programmes and works from national collection.	
Improves curators' professional development through joint working (arranging loans and partnership exhibitions).	
Encourages all organisations to 'raise their game' to be seen as a 'destination' on the bracelet.	
Does not rely on the infrastructure within existing building.	
This model allows for both split-venue touring (showing in several sites simultaneously) as well as consecutively.	
Could be seen in parallel or delivered in sequence with other models.	

## Option 2: Charm Bracelet

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Visual arts organisations feel excluded from the Bracelet and any related public or private funding opportunities	Develop and communicate clear rationale and criteria for why organisations are included in the bracelet; Identify programmes, research, exhibitions or knowledge-sharing events that actively include non-bracelet members; Ensure sector-wide advocacy for the visual arts integrates coordinated messages from the entire sector	5	4	20
Not perceived to be locally relevant as a 'one-size-fits-all' approach	Undertake research and facilitate conversations that enable partners to develop shared aims and interests; Identify unique attributes, audiences and possibilities at each site to position each venue as distinctive	1	3	3
Lack of limited visitation to some sites (e.g. rural)	Ensure attractive proposition is communicated about each site; Identify opportunities and incentives to encourage repeat visitors, and encourage visitors to travel across the network; Partner with VisitWales to ensure all venues are actively promoted to domestic and international tourists	3	4	12
Staff see delivering the national gallery extension programme as an 'add on' to their existing job description, rather than integrated	Build buy-in for programme at early stage, working closely with all partners to understand if/how this integrates with existing job function and what additional resource would be required; Hold quarterly meetings with sector-wide team with clear agenda to discuss how programming is developing, where there are difficulties and how these can be addressed; Celebrate and promote successes formally and informally – internally and externally	2	5	10
Lack of recognition from the Welsh Government	Track and measure success of programme – its impact audiences in particular; Celebrate and promote successes of Partnership externally	1	5	5

## Option 2: Charm Bracelet



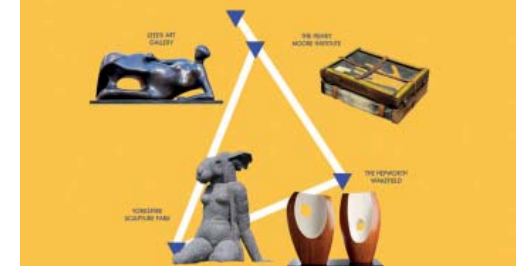
The Humboldt Box, Berlin, Germany  
Exhibition, Watch Out: Children! Protected.  
Loved. Threatened. Humboldt Box, Berlin  
The Info-Box, Potsdamer Platz, Berlin



Serpentine Gallery Pavilion  
Toyo Ito + Cecil Balmond + Arup, 2002  
Herzog & de Meuron and Ai Weiwei, 2012  
Asif Khan, 2016



Garage Centre for Contemporary Culture  
by Shigeru Ban, Moscow



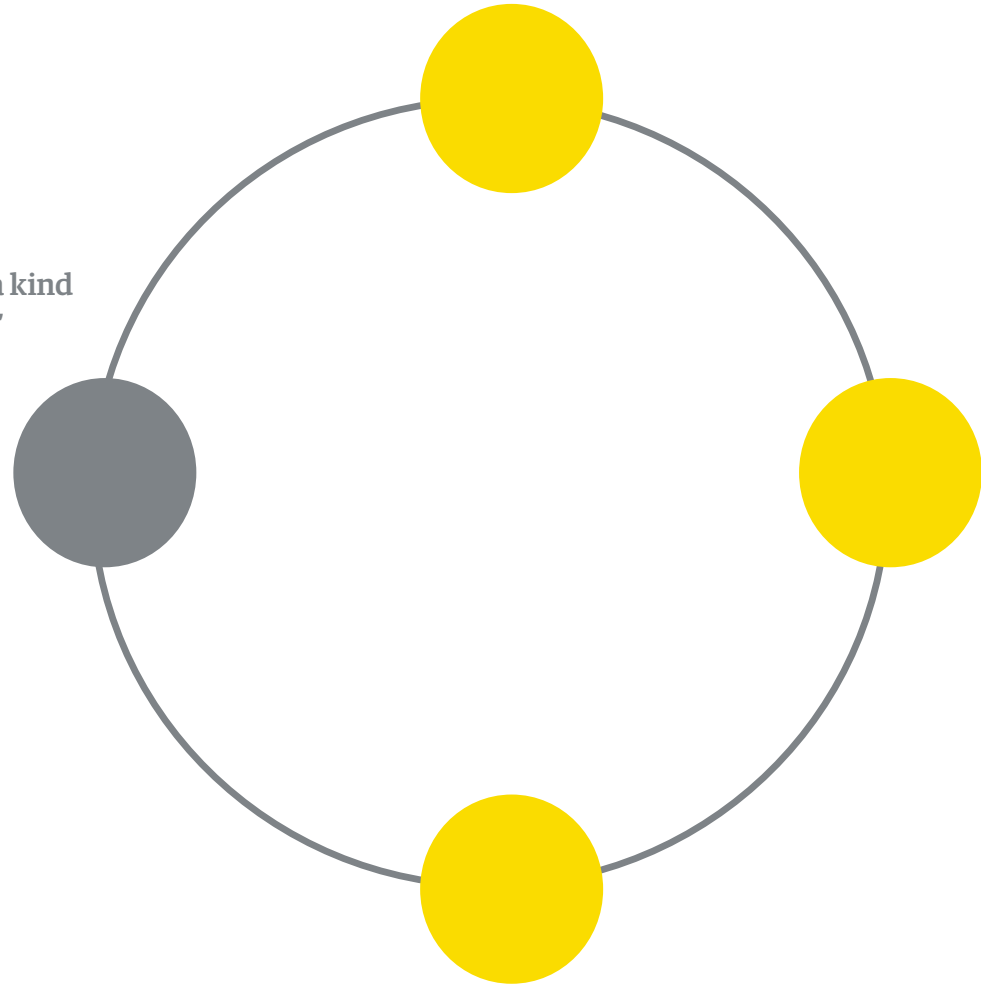
Yorkshire Sculpture Triangle  
Yorkshire Sculpture Park  
Henry Moore Institute



## Option 3: Visual Arts Family

**“Although it will take many years, this is our opportunity to develop a world-class, distinguished set of national visual art galleries.”** Gallery Director

“I’m not sure it is a building; I think it could be a group of buildings, a kind of series of buildings across Wales - across spaces that already exist.”  
Gallery Director



## Option 3: Visual Arts Family

### Model Description

A select group of modern and contemporary visual art and design galleries strategically align under one governing body.

Each associate site is responsible for its own curatorial approach, but there is a collective sense that together they are building:

- a national body of work with a consistent educational approach;
- An ambitious commissioning and acquisitions programme;
- a consistent audience experience, underscored by sophisticated and integrated data analysis;
- a cohesive and linked online presence;
- cohesive brand and marketing image (or sub-brands);
- consistently high customer service;
- cohesive and linked retail and catering offer;
- an ability to lead a national conversation about contemporary art on any number of platforms.

Each gallery will be branded as part of the 'national contemporary art gallery.'

### Capital Requirement

New permanent capital structure (an extension) to be put in place at each venue if required; level of investment would vary

based on size of structure, longevity and recent capital works (e.g. Glynn Vivian's 2016 extension, by way of example only, does not currently need a new physical structure).

The capital cost for a permanent extension is likely to be iro £4,000 per sqm.

A preliminary budget for a permanent small new extension would be £5.8million. This assumes approximately 480sqm public space, 300sqm of temporary gallery space, approximately 300sqm of collection storage and associated amenities and 300sqm BoH space.

A preliminary budget for a permanent medium extension would be iro £10.5million. This assumes approximately 600sqm public space, 800sqm of temporary gallery space, approximately 600sqm of collection storage and associated amenities and 480sqm BoH space.

A preliminary budget for a permanent large extension would be iro £16.8million. This assumes approx. 940sqm public space, 1300sqm of temporary gallery and community space, approximately 950sqm of collection storage and associated amenities and 830sqm BoH space.

### Operational components

#### Leadership and Team

- Lead Director and 3-4 gallery directors;
- Each venue remains autonomous in terms of curatorial direction and has a distinct focus;
- Shared resource pool across the family in marketing, fundraising, membership, retail, collection development and conservation.

#### Programme and Exhibition at each venue

- Permanent exhibition installed once, with 5-10% flexibility for annual changeover;
- Temporary exhibition installed regularly (3 large per annum; 4-5 small per annum);
- Of the temporary exhibitions, 1-2 designed to tour nationally / internationally.

#### Collections Mobility

- Minimal logistics internally and low transport and insurance costs regarding collection movement (i.e. permanent collection does not need to be de-installed when a temporary exhibition is shown);
- Externally, medium costs associated with collections movement. Medium transport and insurance costs.

#### Education and Engagement

- Onsite and online formal and informal learning. A coherent education offer across all sites;

- Community "in-reach" required to extend audiences beyond those visiting. Co-curation with targeted groups. Formal engagement officers required.

#### Commercial Opportunities

- Catering, retail and events personnel required.

#### Marketing

- Emphasis on local, regional, national marketing and international tourism and cultural industry.

#### Development

- Classically diverse fundraising strategy - trusts, foundations, individual donations and corporate sponsorship;
- Necessity to quantify and cultivate Welsh diaspora;
- There is potential to ensure Amgueddfa Cymru's new membership scheme deploys best practice in building membership community;
- There is potential to develop a clear case for support for the corporate sector given the development of high profile infrastructure in a capital city.

#### Building Maintenance

- Consistent and predictable facilities, maintenance and security costs in line with industry averages.

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## Option 3: Visual Arts Family

### **Partners**

- Local authorities
- Welsh Government
- Artes Mundi
- Local cultural and educational partners
- Artists and artist collectives
- Local community groups
- VAGW
- Creative clusters
- Higher education
- Corporate Sector
- International peers

### **Timescale**

3-5 years

## Option 3: Visual Arts Family

Added Value to Wales	
Extends the cultural tourism offer.	
Expresses confidence in the visual arts and raises its visual arts profile in and out of Wales.	
Alleviates the Cardiff-centric concerns amongst non-Cardiff-based audiences and organisations.	
Results in positive economic impact defined by combined supply-chain and induced spending in local area including construction employment and potentially additional visitor spend.	
Strengths	Weaknesses (see risks overleaf)
Ensures 'national' is truly national and geographically dispersed.	Requires consideration of how this is developed alongside the existing Amgueddfa Cymru brand and family
Ensures collection is widely distributed across Wales and unseen collections are made visible.	Some organisations may feel excluded from public funding opportunities.
Aligns with international peers.	

## Option 3: Visual Arts Family

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Visual arts organisations feel excluded from the National Family and any related public or private funding opportunities	Ensure Family Members are aware that their roles as 'national' entities include enabling, facilitating and brokering conversations, collections-sharing and national and international networks for the benefit of all; Develop and communicate clear rationale and criteria for why organisations are designated the national family; Identify programmes, research, exhibitions or knowledge-sharing events that actively include the sector; Ensure sector-wide advocacy for the visual arts integrates coordinated messages from the entire sector	5	3	15
Not perceived to be locally relevant as a 'one-size-fits-all' approach	Undertake research and facilitate conversations that enable partners to develop shared aims and interests; Identify unique attributes, audiences and possibilities at each site to position each venue as distinctive	2	4	8
Lack of limited visitation to some sites (e.g. rural)	Ensure attractive proposition is communicated about each site; Identify opportunities and incentives to encourage repeat visitors, and encourage visitors to travel across the network; Partner with VisitWales to ensure all venues are actively promoted to domestic and international tourists	2	5	10
Takes a long time to establish reputation	Communication strategy publicising; High profile annual reports; Nation-wide symposia; Participate in international programmes; Work closely with national and international press; Build sense of local ownership through engagement with communities and education	3	5	15



## Option 3: Visual Arts Family



Tate Modern, London, UK  
Tate Liverpool, Liverpool, UK

Tate St Ives, St Ives, UK  
Tate Britain, London, UK

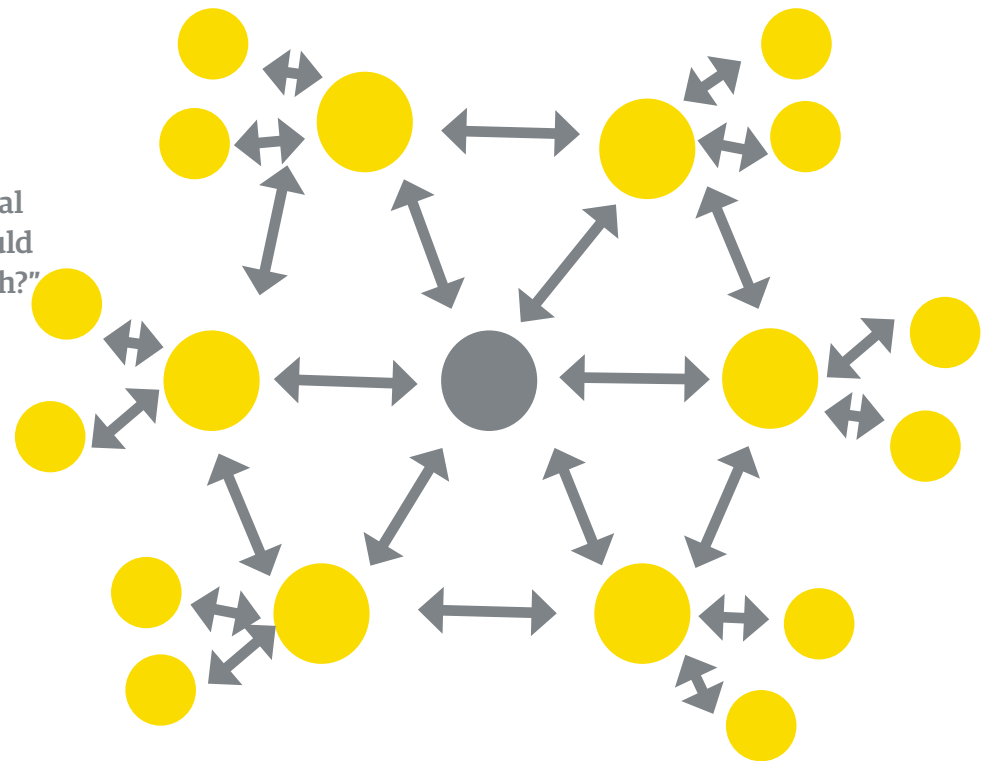
## Option 4: Network Members Club

**“Rather than being a sponge that soaks up water, it should be a sponge filled with water that makes the puddle bigger.”** Curator and

**Researcher**

“One of the ongoing discussions and debates with those seven national organisations is how they can display a generosity of spirit. What would we have to put in place in the start to ensure this ethos carries through?”

**Funder**



## Option 4: Network Members Club

### Model Description

Defined by thought-leadership and collaboration, this strategic network takes the form of a 'members club' for the visual arts sector. The network pro-actively seeks opportunities to enable and promote watershed moments in contemporary visual arts, and offers a robust and creative knowledge-exchange programme.

### Capital Requirement

Minimal.

### Operational components

#### Leadership and Team

- A director-level Creative Producer will spark ideas, develop projects at anchor visual arts venues and facilitate a national conversation.
- A senior manager will deliver sector-wide fundraising bids, marketing and PR, research, and advocacy events. Skills and resource-gap research will identify key areas for shared-services (e.g. conservation), resulting in shared-service pool developed for the network.
- An exhibitions manager/curator will facilitate shared exhibitions and develop a national/international touring programme of exhibitions, drawing on the national collection and anchor venue collections and ideas.
- A commercial officer will develop a compelling nation-wide retail offer, (a visual arts brand for Wales), partnering

with product design/fashion students in art schools to draw on assets from across the nation and sold at multiple sites online and off.

- A coordinator will ensure members benefit from ongoing formal and informal knowledge sharing events, shared services and skills development. Potentially this could include a nation-wide curatorial and/or artist fellowship, or internship programme, where participants rotate through the network.

### Programme and Exhibition

- Joint exhibitions developed for sharing across anchor-sites, and for touring internationally.

### Collections Mobility

- Mid-scale logistical requirements. Mid-scale transport requirements. High insurance costs.
- Internationally touring will require high-scale logistical requirements, transport and insurance costs.
- Does not solve issue at Amgueddfa Cymru, requiring high-logistical requirements internally to turnover permanent collection for temporary exhibitions.

### Education and Engagement

- Nation-wide dynamic audience research informs sector programming and positioning

- For touring exhibitions, joined-up education programme, relying on locals to co-develop and deliver programming relevant to their constituents

### Commercial Opportunities

- Touring exhibitions internationally will raise Welsh profile and may garner a small financial return.
- Potential for innovative retail offer, as outlined above.
- Emphasis on projects and exhibitions that permeate the network across the nation – a focus on regional and national marketing and domestic/cross-border tourism positioning.

### Marketing

- Emphasis on local, regional and national cultural sector.

### Development

- Sector-wide exhibitions and programming may be a particularly attractive proposition to funders – public and private - if social impact can be projected, evaluated and learning reapplied to the programming. Opportunity to collectively explore the Welsh diaspora market for particularly ambitious programmes across the network.
- Corporate support may viable if clear brand alignment and wide market reach.

- Opportunity to further develop nation-wide 'members' pass – e.g. collectively joining up with The National Art Pass (Art Fund) and integrating with any hyper-local offer.

### Maintenance

- None

### Partners

- Grass-roots initiatives
- Art schools
- Visual arts organisations
- Retail brands
- Corporate partners
- International peers
- National and international networks

### Timescale

6-9 months- Recruitment and establish network  
9months – ongoing delivery

## Option 4: Network Members Club

Added Value to Wales	
Raises the profile of the Welsh visual arts sector by enabling co-working to deliver international touring exhibitions.	
Raises the skill-set of the Welsh visual arts sector and provides access to best-practice and specialist expertise.	
Provides impetus and resource to encourage sector to work together more strategically and ambitiously.	
Helps sustain and develop the visual arts ecology, ensuring existing visual arts leadership is supported and given additional capacity to deliver national and local programmes.	
Bestows confidence in the Welsh visual arts sector, recognising the existing cultural assets in Wales.	
Extensive audience reach and can provide platform for developing thorough market data.	

## Option 4: Network Members Club

Strengths	Weaknesses (see risks overleaf)
Long-term potential to have significant impact on Welsh visual arts by raising the skills-set and by increasing beyond Wales networks.	Difficult to maintain and ensure all members are benefiting.
Leverages creative clusters and hubs, networks and shared spaces.	Some organisations may feel left out if they are not a member.
Ensures two-way (or more) conversations.	Presents challenges in maintaining focus on a vision if there are a large number of partners.
Encourages local ownership and draws actively on local knowledge.	Potentially too complex or too hidden to deliver significant impact from a public perspective.
Potential for big projects and small meaningful local projects to be delivered as it enables large institutions and smaller organisations to work together.	
Varied partnerships within and outside Wales.	
Allows for dispersed ownership but ensures single voice represents the visual arts sector. A formalised version of VAGW that advocates and drives change for the sector.	
Flexible enough to change according to evolving contemporary art practice.	
Potential to 'sell' expertise to others nationally or internationally and as a result be less reliant on public subsidy.	
Potential to pool resources and as a result reduce strains on capacity.	

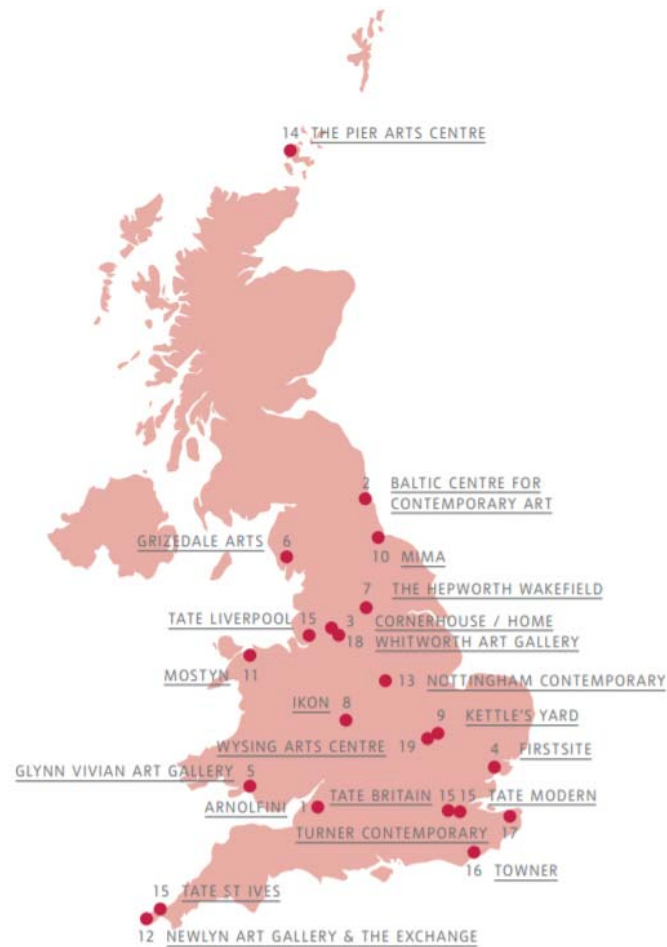


## Option 4: Network Members Club

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Loss of coherent vision across complex network	Recruit artistic leadership with collaborative ethos, strong communication skills, extensive track record and ambitious vision; Ensure curatorial vision is well communicated and sense of ownership shared widely	3	5	15
Develops as a professional members organisation, rather than a visible national contemporary arts gallery/entity	Develop brand identity that enables all members of the Club to identify as such to their audiences; Develop clear strategic aims that include appropriate sector-wide exhibitions or programmes that warrant ambitious marketing campaign. Partner with VisitWales to ensure all members are strategically promoted to domestic and international tourists	5	5	25
Easily cancelled if programme does not demonstrate clear successes or impact in short term	Track and measure success of programme – its impact audiences in particular; Celebrate and promote successes of the Club externally	4	5	20
Staff see delivering components of the Members Club as an 'add on' to their existing job description, rather than integrated	Build buy-in for the Club at early stage, working closely with all partners to understand if/how this integrates with existing job function and what additional resource would be required; Hold quarterly meetings with sector-wide team with clear agenda to discuss how programming is developing, where there are difficulties and how these can be addressed; Celebrate and promote successes formally and informally – internally and externally	4	5	20
The Club exists only in the consciousness of the visual arts professional community; There is no differentiating factor for audiences to grasp	Identify existing and target audiences and develop consistent communications; Develop clear brand identity at early stage; Build appropriate marketing costs into operating model	5	5	25
Lack of recognition from the Welsh Government	Track and measure success of programme – its impact audiences in particular; Celebrate and promote successes of the Club externally	4	5	20

## Option 4: Network Members Club

- 1 ARNOLFINI
- 2 BALTIC CENTRE FOR CONTEMPORARY ART
- 3 CORNERHOUSE / HOME
- 4 FIRSTSITE
- 5 GLYNN VIVIAN ART GALLERY
- 6 GRIZEDALE ARTS
- 7 THE HEPWORTH WAKEFIELD
- 8 IKON
- 9 KETTLE'S YARD
- 10 MIMA
- 11 MOSTYN
- 12 NEWLYN ART GALLERY & THE EXCHANGE
- 13 NOTTINGHAM CONTEMPORARY
- 14 THE PIER ARTS CENTRE
- 15 TATE
- 16 TOWNER
- 17 TURNER CONTEMPORARY
- 18 WHITWORTH ART GALLERY
- 19 WYSING ARTS CENTRE



PlusTate Network

## Option 5: National Canvas

**“Completely unique, completely site specific, really surprising. Contemporary art should do that. It doesn’t require an architectural space. Artist and curators would be completely galvanised. It would be a new model.” Critic**

“A dispersed model is something that people want. It becomes tricky with some works - environmental and security limitations. While you can’t put a Cezanne in a village hall... you can project a video installation in a viaduct in Ruthin.” Curator

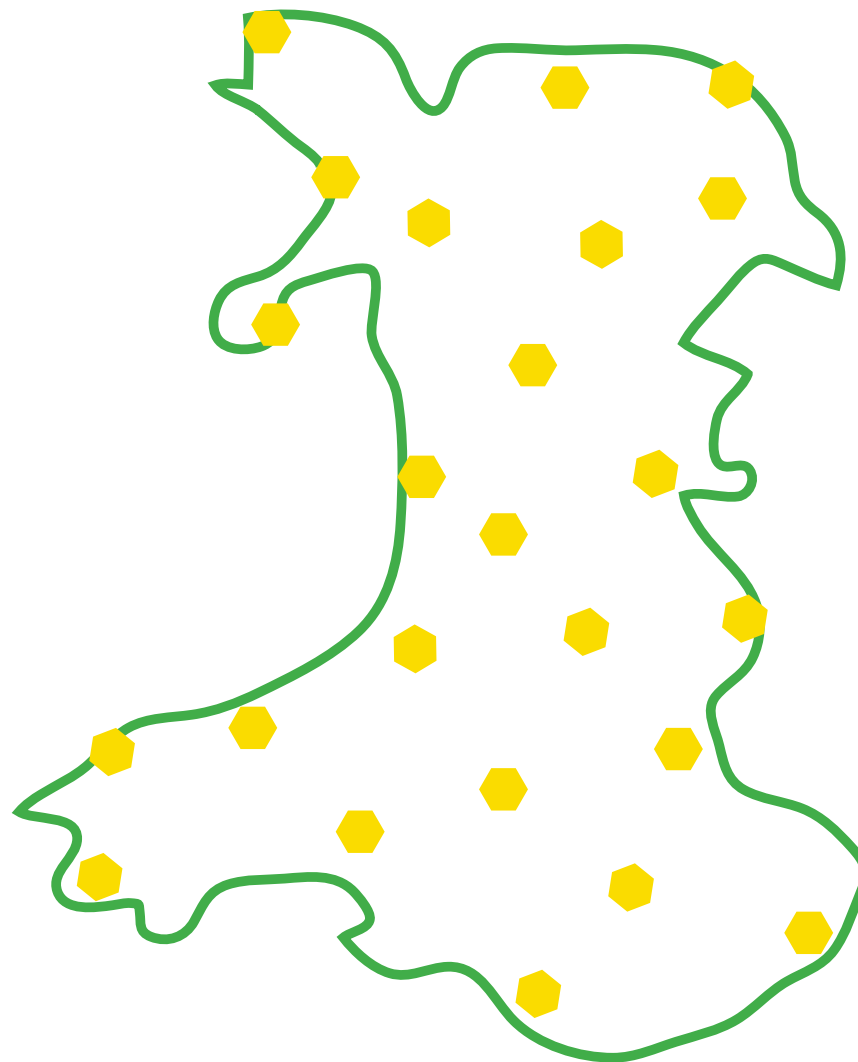
“Wales can and should put itself on the map! It can start from scratch in 21st century and be really, really fresh.” Museum Director

“The Wales Way project, based on a notion of ‘igam ogam’ (zig-zagging) [is] essentially about putting people in outstanding,

unexpected landscapes. I think there could be major tie-ins with any ‘alternative’, ‘virtual’ gallery.” Tourism Director

“Mimicking the evolving style of artists themselves, the new entity mimics contemporary art practice. It involves. It changes. It disappears.” Professor

“National contemporary art is all about developing participatory places without an entity. Landscape, shop fronts, houses, housing associations. Animate old buildings. There are lots of things you can do.” Museum Director



## Option 5: National Canvas

### Model Description

*A landscape focused national gallery comprising ambitious temporary, semi-permanent, or permanent artistic commissions across Wales.* The contemporary art collections are situated outdoors or in a range of traditional and non-traditional or disused spaces. The National Canvas would be defined by a vibrant commissioning model and would draw on the Wales Way, three tourist routes being promoted to domestic and international tourists.

The National Canvas is a pioneering approach to public curating and national, democratic access to contemporary culture. A Curatorial Research Group come together to develop and curate the works. Each member submits or commissions a single artwork and supports the journey of each piece to its location, whether a loan item from the national or an international collection or a commission developed with contemporary artists.

### Capital Requirements

- Large commissions budget ring-fenced for first artworks, iro 50-100 artworks across the country. Commissions range in cost between £20,000 to £5million;
- Minimal spend on supportive infrastructure (e.g. sheltered education spaces, retail units, F&B, or viewing areas adjacent to commissions);
- Requirement for signposting across Wales (online and/or physically).

### Operational components

#### Leadership and Team

- Lead Artistic Director and a team of creative producers that initiate and oversee the programme in their geographic clusters;
- A Curatorial Research Committee made up of the general public, artists and creatives, works alongside specialists to co-curate the exhibition and commission site-specific works;
- Potential for shared resource pool across visual arts ecology relying on anchor organisations for fundraising, marketing, conservation.

#### Programme and Exhibition

- A significant proportion of the external commissions are permanent; those in disused spaces are temporary;
- Rolling programme of commissions added over time;
- Systems for commissions to be acquired by Amgueddfa Cymru.

### Collections Mobility

- Mid-scale logistical requirements. Low transport. High insurance costs.

### Education and Engagement:

- Onsite and online formal and informal learning.

### Commercial Opportunities:

- Potential to develop new forms of commercial opportunities (given non-traditional spatial brief), including pop-up restaurants, cafés, street food venues. Potential commissioning agreement with catering and retail;
- A commercial officer will develop a compelling nation-wide retail offer, (a visual arts brand for Wales), partnering with product design/fashion students in art schools to draw on assets from across the nation and sold at multiple sites online and off.

### Marketing:

- Emphasis on local, regional, national marketing and international tourism and cultural industry;
- Link to Wales Way.

### Development:

- Classically diverse fundraising strategy - trusts, foundations, individual donations and corporate sponsorship;
- Potential to draw funds from capital investment projects in other sectors

(Section 106, place-making and public art);

- Corporate sector sponsorship for specific commissions;
- Legacy fundraising;
- Ongoing crowd-funding campaigns.

### Maintenance:

- Security and insurance requirements at all sites;
- Maintenance requirements for outdoor artworks.

### Partners

- Artists and artist collectives;
- Visual arts organisations;
- Local and regional authorities;
- VisitWales (champion);
- Food companies;
- Corporate partners;
- International peers;
- Embassies.

### Timescale

Year One: Recruitment of curatorial leadership and team; establish curatorial research committee; establish key partnerships; establish marketing and fundraising approaches; develop national education programme; launch commissioning programme.

Year two-four (and ongoing): Commissions across Wales.

## Option 5: National Canvas

Added Value to Wales	
Extends the nation's cultural tourism offer.	
Disrupts the traditional contemporary art gallery model (white-box space, starchitect designed) while being authentic and using Wales's best assets.	
Builds a contemporary arts audience within Wales through developing a dialogue and engagement at a local level.	
Provides truly democratic access to the collection and any new commissions for Welsh people, in particular those that do not feel art or galleries is for them.	
Results in indirect economic benefit of visitor day spend and short term job creation.	
Develops new ways to 'collect the uncollectable' within the national collection.	



## Option 5: National Canvas

Strengths	Weaknesses (see risks overleaf)
Highly visible in Wales and provides compelling press and marketing opportunities.	Too diffuse, vague and romantic as an idea.
Highly innovative. It provides an accessible experience - going beyond the gallery. It extends current curatorial practice and encourages a new education and engagement model.	Relies on Welsh transport infrastructure being state-of-the-art; lack of infrastructure might dictate location of artworks.
Focuses on the landscape, which is in keeping with the strengths of Welsh modern and contemporary art.	Limits access to those without vehicles
Positions the landscape as an opportunity rather than a barrier and uses disused buildings to provide exciting opportunities for artists to work in.	Outdoor elements maybe perceived to be a limiting factor..
Pushes contemporary visual artists work forward, encouraging them to respond to landscape - rather than 'white box' opportunities	While disused buildings could showcase new commissions, these are unlikely to be environmentally-sound.
Decentralised approach enabling it to be delivered throughout Wales, in different location types – urban and rural, populated and unpopulated, etc.	Does not directly address capacity issues raised by sector.
Provides employment opportunities across Wales.	
Increases sense of a community and ownership through co-curation and commissioning.	
Develops national collection through new commissioning, while providing opportunities to display large (often unseen) contemporary works.	
Develops new funding opportunities that break the mould.	

## Option 5: National Canvas

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Loss of curatorial vision across complex programme	Recruit artistic leadership with collaborative ethos, strong communication skills, extensive track record and ambitious vision; Ensure curatorial vision is well communicated and sense of ownership shared widely	1	5	5
Lack of high visibility	Ensure ambitious roll out of programme, including world-class artist commissions (Welsh and overseas artists) and online presence; ensure works of art are geographically spread, but accessible; Partner with VisitWales to ensure the programme is strategically promoted to domestic and international tourists	2	4	8
Easily cancelled if programme does not demonstrate clear successes or impact in short term	Track and measure success of programme – its impact on audiences, artists, national identity, local economies, nearby attractions (on Wales Way) and associated investment in scheme and press coverage	3	5	15
Staff see delivering components of the National Canvas as an 'add on' to their existing job description, rather than integrated	Build buy-in for the National Canvas at an early stage, working closely with all partners to understand if/how this integrates with existing job function and what additional resource would be required; Establishing dedicated team; Hold regular meetings with regional creative clusters with clear agenda to discuss how programming is developing, where there are difficulties and how these can be addressed; Celebrate and promote successes formally and informally – internally and externally	3	3	6

## Option 5: National Canvas



Art Everywhere, UK

Artangel, London, UK

A Current Under Sea: Margate  
Journeys With The Waste Land  
Cy Twombly Four Seasons and  
Henrik Håkansson A Tree Divided  
Laura Ford, A&E Monkey  
Doug White, Black Palm

Cultural Olympiad 2012  
Robert Smithson, Spiral Jetty,  
USA

The Public Space, 2017-18,  
Nationalmuseum, Sweden  
Christo and Jeanne-Claude, The  
Floating Piers Lake, Italy 2014-16  
Christo and Jeanne Claude, The  
Gates, Central Park, New-York  
1979-2005

## Option 6: Circus

**“We dream about putting together an exhibition and touring it across Wales and bringing young curators with us. All of this would feed into the ecosystem.”** Curator

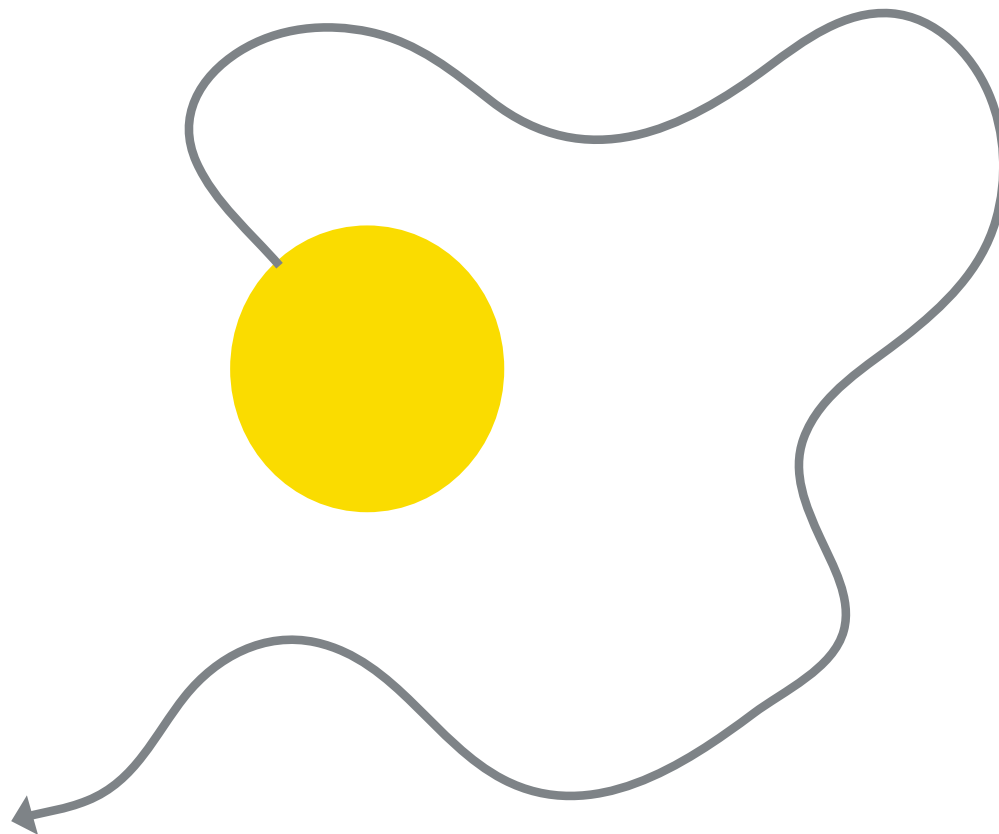
“Take that amount of money (£2.5m) and spend it on a program. And engagement.”  
Funder

“It doesn’t have to have a home, it uses art and performing arts and history and culture and science. It’s a peripatetic model, a home-grown Welsh model that promotes and encourages participation and focuses on the Welsh language.”

Museum Director

“Building a relationship with the community is time consuming...it’s a long-game.” Educator

“National Theatre Wales is an interesting model – fleet of foot, collaborative – it builds communities when it goes out there. When it rolls into town, it’s a boost. It’s really exciting for the community.” Funder



## Option 6: Circus

### Model Description

A physical entity that tours the same exhibition from town to town, place to place across Wales. It annually or biannually can return to the same areas building a legacy year on year.

Local ambassadors, including artists, educators and social workers generate activities and programmes. These are bespoke to each community and region and are developed in advance and in partnership with the core team.

### Capital Requirements

Capital expenditure could range from £500,000 - £1million for a small mobile, temporary structure, depending on materials and ambition. It is assumed that the temporary gallery space is a minimum size of 200sqm, alongside minimal public and BoH space. The mobile unit could be doubled in size, but at this scale, the capital expenditure is iro of £2.5million.

It could include a pop-up display which could be packed up easily, with minimal wear and tear, and minimal skilled labour to install. This would include all AV equipment, exhibition network and collection so that only set up is necessary.

The transport vehicles require air suspension and climate control. For the purpose of this study we are

assuming there is a single mobile unit, however this could be scaled to include multiple mobile units which tour Wales simultaneously.

### Operational Components

#### Leadership and Team

- Single visionary leader partners with guest curators and local creative producers.
- Curatorial Touring Team research and develop exhibition, graphics and interpretation, organise insurance and collections. They are also responsible for planning and supervising install/de-install (if in situ).
- the Curatorial Touring Team are responsible for cultivating relationships with partners and hosts.

#### Programme and Exhibition

- Semi-permanent touring collection and/or constantly refreshed and curated temporary shows that are updated once a year.
- Potential for sharing resources with the visual arts sector in fundraising, audience research, marketing and education.

#### Collections Mobility

- Extensive logistical requirements in terms of moving collections. High transport, insurance, security costs.

### Education and Engagement

- Non-didactic education philosophy through in-situ learning and partnering with ambassadors.
- Core team at source trains ambassadors at local level to reach local and marginalised audiences. Activities and educational programmes developed locally.
- Strong case for a knowledge exchange programme, where existing visual arts sector could get involved during the lifetime in that area.

### Commercial Opportunities

- A commercial officer will develop a compelling nation-wide retail offer, (a visual arts brand for Wales), partnering with product design/fashion students in art schools to draw on assets from across the nation and sold at multiple sites online and off.

### Marketing

- Marketing is hyper-local, local, clusters, Wales Way and national.

### Development

- Diverse fundraising strategy.
- Potential for innovative corporate partnerships. Local authority support more likely with returning programmes.

### Maintenance

- Low cost but frequent maintenance required.

### Other

- Requirement for advanced planning – including audience development, marketing and educational programme.

### Partners

- 'Hosts' and partners identified across Wales, including existing visual arts venues and organisations, local authorities and other local groups.
- Creatives including artists, theatre companies, digital specialists, circus performers, film companies, etc..
- Potential to piggyback on festivals.

### Timescale

Quick lead in time comparatively.  
1-6 months: develop and design infrastructure required, build tour schedule, approach hosts and partners, build opportunities for outreach activities, marketing plan, evaluation plan for tour, plan and submit funding applications for additional funding/sponsorship.

6-18 months: build or organise transport, development of programme and collections display, marketing and communications plan and press releases ongoing work with sponsors

18 months: Begin tour, and continue to develop next tour.



# Option 6: Circus

Added Value to Wales	
Builds a contemporary arts audience within Wales through developing a dialogue and engagement at a local level.	
Provides truly democratic access to the collection and any new commissions for Welsh people, in particular those that do not feel art or galleries is for them.	
Provides indirect economic benefit of visitor day spend and short term job creation.	

## Option 6: Circus

Strengths	Weaknesses (see risks overleaf)
Provides regular, potentially more frequent access to the collection.	Emphasises programme delivery but doesn't address lack of organisational capacity at visual arts venues across Wales.
Enables direct one-to-one engagement with the collection, artists, specialists and thus increases the depth of engagement.	Requires insurance for mobile approach.
Starts with the audiences and ideally attracts new ones – given that it goes 'to' the audiences.	Relies on high-quality infrastructure (road/rail), which is currently lacking.
Allows for exhibitions to appear in interesting locations and provides different ways of seeing the collection.	Requires capacity to change programmes more frequently.
Offers a transformational experience for artists.	
Builds excitement and draws audiences to the sites given they are only in one area for a dedicated period i.e. it 'festivalizes' the sites - if they don't visit now, they might miss it.	
Press interest around 'circus coming to town' which increases local arts and artistic profiles.	
Authentically involves local artists. Artists can be used as mediators to local community.	
Potential to leave lasting legacy by encouraging people to go to their local museums with joint-marketing and public programmes in place.	
Crowd-funding opportunities around programmes, increasing funding and public interest.	
Could be seen in parallel with other models.	

## Option 6: Circus

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Fails to create long-term legacy, positive social impact or change	Ensure initial 3-5 year strategy identifies annual return trips to the same communities/regions, so legacy builds over time – local groups 'hosting' the circus collaborate and plan for its annual visit; Develop nation-wide group of organisers who gather regularly to refine the Circus strategy, route, retail/catering offer and associated programming; Put in place longitudinal research study to assess impact on audiences, artists, local/national sense of identity, local economies, nearby attractions (on Wales Way) and associated investment in scheme and press coverage; Actively identify opportunities for locals to join the circus or deliver it in situ – including internships/docenting, artist short-term residencies and programmes in local schools. Creatively track the circus's journey across Wales – video blog, etc. – to ensure it builds anticipation and momentum as it travels.	4	4	16
Fails to integrate with or leverage programming across visual arts ecology	Build buy-in from the visual arts sector at an early stage, identifying a high-profile, hard-working committee to ensure realistic relationships with 'local' arts venues are brokered; work closely with all partners to define how the Circus programme integrates with their 3-5 year exhibition/programming strategy, and where there are particular opportunities for leverage (programming, funding, press). Celebrate and promote successes formally and informally – internally and externally	2	4	8
Lacks opportunities for long-term conversations with audiences	Ensure initial 3-5 year strategy identifies annual return trips to the same communities/regions, so legacy builds over time – local groups 'hosting' the circus collaborate and plan for its annual visit	2	5	10
Seen as didactic, nationally or politically imposed	Recruit artistic leadership with collaborative ethos, strong communication skills, extensive track record and ambitious vision; Consider co-curation opportunities for exhibitions in circus – e.g. WhatNext style partnerships that push the definition of 'curatorial authority' in the 21st century	1	4	8

## Option 6: Circus



Ashes and Snow, Nomadic Museum, Shigeru Ban, 2002, Pier 54 on the Hudson River, USA



The National Eisteddfod of Wales



Adain Avion, Marc Rees, 2012, Artists Taking the Lead, Wales BMW Guggenheim Lab



Artrain, USA



National Theatre Wales  
Hide At St Donats  
Julie's Bicycle  
Croach Touch Pause Engage, Robin Soans, 2015



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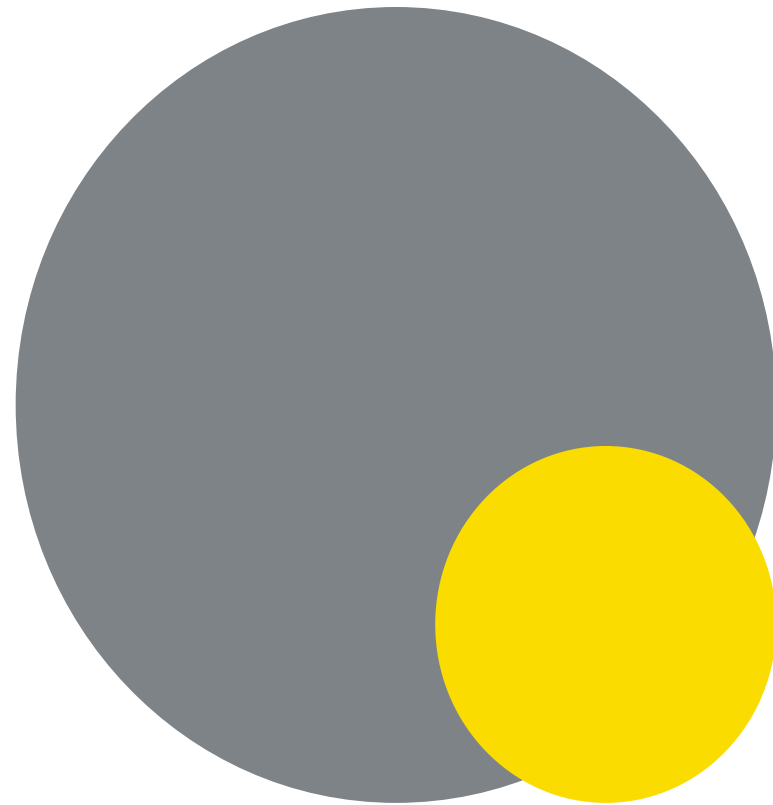
## Option 7: Extension

**“It would be fantastic. But the second best thing is to look at who is doing what well and support it.” Artist**

“There already is a national contemporary art gallery. It is a very successful one. It’s the National Museum Cardiff.” Museum Director

“It doesn’t have to be for showing. It could be a residency for people to use.” Museum Director

“Being located at the National Museum... means it would capitalise on the number of people coming there already and Artes Mundi is based there.” Artist





## Option 7: Extension

### Model Description

An extension to Cathays Park, Amgueddfa Cymru designed to showcase modern and contemporary art and design works. The extension houses the permanent display of the national modern and contemporary art and design collection and provides temporary spaces for an experimental artistic programme and a series of welcoming social spaces.

The extension model is defined by a centralised organisation (Amgueddfa Cymru), but actively partners nationally and internationally.

### Capital Requirement

Minimum of £20million, but for a new state-of-the-art extension, approximate capital cost likely to be iro £25million with an estimated spend £4,500 per sqm.

It is assumed that this would include 940sqm of public space, alongside some landscaped external areas, 2,500sqm of gallery space (permanent, temporary and community gallery spaces), 650sqm exhibition storage space and 1050sqm BoH space.

### Operational Components

#### Leadership and Team

- Centralised management. A single visionary. In-house and guest curators.

### Programme and Exhibition

- Permanent exhibition installed once, with 5-10% flexibility for annual changeover.
- Temporary exhibition installed regularly (3 large per annum; 4-5 small per annum).
- Of the temporary exhibitions, 1-2 designed to tour nationally / internationally.

### Collections Mobility

- Minimal logistics internally and low transport and insurance costs regarding collection movement (i.e. permanent collection does not need to be de-installed when a temporary exhibition is shown).
- Externally, medium costs associated with collections movement. Medium transport and insurance costs.

### Education and Engagement

- Onsite and online formal and informal learning.
- Community “in-reach” required to extend audiences beyond those visiting. Co-curation with targeted groups. Formal engagement officers required.

### Commercial Opportunities

- Catering, retail, events, hire personnel required.
- Limited potential for shared resource pool across visual arts ecology. However, can draw on existing expertise in

contemporary art and design already employed at Amgueddfa Cymru.

### Marketing

- Emphasis on local, regional, national marketing and international tourism and cultural industry. In particular, requirement to market within larger urban areas in South England, such as London, Bristol, Swindon and Bath.

### Development

- Classically diverse fund raising strategy - trusts, foundations, individual donations and corporate sponsorship.
- Necessity to quantify and cultivate Welsh diaspora.
- There is potential to ensure Amgueddfa Cymru’s new membership scheme deploys best practice in building membership community.
- There is potential to develop a clear case for support for the corporate sector given the development of high profile infrastructure in a capital city.

### Building Maintenance

- Consistent and predictable facilities, maintenance and security costs in line with industry averages.

### Partners

- Cardiff Council (site identification, assistance with delivery, planning

process, integration with existing infrastructure, brokering partnerships, financial contribution to capital and likely ongoing revenue support)

- Artes Mundi
- Local community groups
- VAGW
- Higher education
- Corporate sector
- Clwstwr Creadigol
- International peers

### Timescale

Year one: Develop a functional brief for spatial requirements and services; Capital campaign; Evaluate impact on organisation; Procure additional skills/team-members as required

Year two-four: Design development and build extension, prepare and install collection.

## Option 7: Extension

Added Value	
Extends the capital's cultural tourism offer.	
Benefits visual arts sector in Cardiff by increasing visibility of the visual arts in the city	
Builds on the Clwstwr Creadigol (1 of 22 shortlisted) and contributes to the growth of the creative economy (Cardiff is 1 of top 10 creative cities)	
Catalyses Amgueddfa Cymru to deliver a Masterplan and make decision about which collections will remain at Cathays Park.	
Provides positive economic impact through supply-chain and induced spending in local area including job creation, construction employment and additional visitor spend (potentially overnight spend).	
Strengths	Weaknesses (see risks overleaf)
Maintains and invigorates the Amgueddfa Cymru brand.	Places all investment in the Amgueddfa Cymru, while others in the visual arts sector do not benefit directly
Potentially draws national and international tourists to Cardiff.	Limits democratic access to the collection, given the Cardiff-focus
Potentially increases footfall and broadens audiences to Cathays Park site.	Likely limits pool of visitors from cross-border North Wales
Draws upon existing resources (like education teams), while requiring additional expertise.	
Provides a platform for cross-disciplinary collections and displays, given the wealth of multi-disciplinary collections at the Amgueddfa Cymru site.	
Provides greater access to more of the contemporary art collection	
Ensures that when Artes Mundi is on view, the permanent collection of contemporary art can also remain on view – allowing for more dialogue between collections, and greater access for audiences who visit specifically for Artes Mundi	
Could be seen in parallel with other models	
Existing proof of growing market in contemporary arts and of visits in the region of 500,000 per annum would suggest this is a stable offer.	
Sufficient regular temporary space enables exhibitions always to be on display to ensure no 'dark' weeks.	

## Option 7: Extension

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Results in perception that there is insufficient change in the sector	Draw on existing collaborative ethos of the Amgueddfa Cymru curation/collections teams to jointly develop vision for the extension that draws on national and international expertise in contemporary visual arts; Identify tangible ways in which the sector could co-deliver aspects of the programme to ensure it is national; Consider rolling out other models identified in advance of building extension that focus on collaborative, ambitious exhibitions/collections development across Wales	5	5	25
Centralizes the Amgueddfa Cymru and limits impact on all of Wales	Ensure programme is national in scope – in terms of how it is developed and delivered; Track success of extension and measure its impact on Wales – e.g.. Cultural tourism research; awareness of Wales overseas, etc.. Ensure extension is authentic to Wales	5	5	25
Becomes too closed and insular – no longer requires Artes Mundi to partner with other venues	As above, draw on existing collaborative ethos of the Amgueddfa Cymru curation/collections teams to jointly develop vision for the extension that draws on national and international expertise in contemporary visual arts; Identify tangible ways in which the sector could co-deliver aspects of the programme to ensure it is national	3	5	15
Requires significant revenue-funding	Build a realistic and conservative business model that clearly identifies at the feasibility stage what the revenue-requirement will be. Undertake fundraising feasibility study, including testing endowment strategy, to ascertain how realistic the projections are and to understand how the commitment will be met for next 50+ years;	3	5	15
Lacks buy-in from the sector	Ensure Amgueddfa Cymru team define their remit as a 'national contemporary arts entity' that enables, facilitates, brokers conversations, collections-sharing, exhibitions and national and international networks for the benefit of all; Develop and communicate clear rationale for delivering extension-model; Share successes; Ensure Amgueddfa Cymru staff are resourced to deliver a 'national' model both on and off-site	4	4	16

## Option 7: Extension

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Focuses on raising money rather than changing the sector	Have absolute clarity on how the extension model can positively lift the entire visual arts sector; identify, cultivate and collaborate with funders that are able to support a truly national approach across Wales	3	4	12
Fails to innovate or invigorate the visual arts sector as a whole	Identify tangible ways in which the sector could co-deliver aspects of the programme to ensure it is national; Recruit a national board/entity of high-profile individuals with a track record for catalysing compelling change both in the visual arts and in any other industry	3	5	15
Potential delays could impact Amgueddfa Cymru visitation	Ensure clear off-site programme is in place, drawing on cultural and community assets across Cardiff and the region; ensure these platforms are still used after the extension opens.	2	4	8

## Option 7: Extension



Extension at Tate St Ives, UK

Hamburger Kunsthalle, Hamburg, Germany

Fondazione Prada, Milan, Italy

Palais de Tokyo, Paris, France



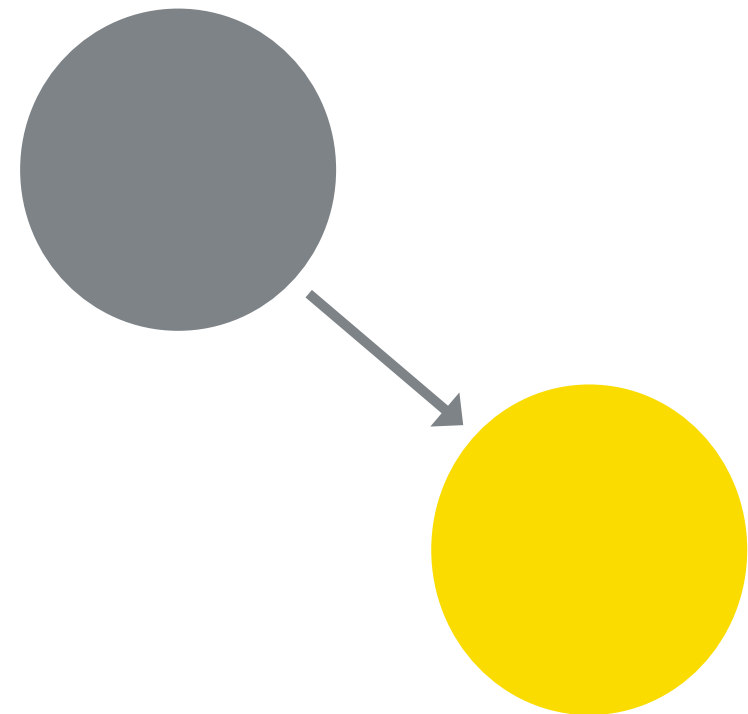
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## Option 8: Outpost in Capital

**“From me, just if we are going to do it, it has to be iconic to attract visitors, no half measures.”** Tourism Director

“Wales also deserves a truly iconic creative/cultural establishment that defines and redefines our place in the world. This would obviously start with the content/art itself.” Tourism Director

“A building is hierarchical, a very masculine ideal. It’s monolithic. Come on a journey to us.”  
[Male] Professor



## Option 8: Outpost in the Capital

### Model Description

*A sister gallery to the Amgueddfa Cymru, this Contemporary Art Centre provides ample space for the display of ambitious contemporary art within Cardiff.*

This model's architectural requirements are established from 'scratch', resulting in a completely 'fit for purpose' centre. Within this new space there is dedicated permanent, temporary and community gallery spaces, collection and exhibition storage spaces, public spaces including learning, F&B and retail spaces and BOH.

### Capital requirements

An iconic new build would cost iro £50million. This assumes and £5,000 per sqm and approximate GFA of 10500sqm. However the capital cost could be as much as £7,000 per sqm for a signature architect, iro £75.5 million for something of the same scale.

For a more functional build cost iro 4,000 per sqm the preliminary budget would be approx. £42million.

### Operational components

#### Leadership and Team

- Centralised management. A single visionary leader. In-house and guest curators;
- Limited potential for shared resource

pool across visual arts ecology. However, can draw on existing expertise in contemporary art and design already employed at Amgueddfa Cymru.

### Programme and Exhibition

- Permanent exhibition installed once, with 5-10% flexibility for annual changeover;
- Temporary exhibition installed regularly (3 large per annum; 4-5 small per annum);
- Of the temporary exhibitions, 1-2 designed to tour nationally / internationally.

### Collections Mobility

- Minimal logistics internally and low transport and insurance costs regarding collection movement (i.e. permanent collection does not need to be de-installed when a temporary exhibition is shown);
- Externally, medium costs associated with collections movement. Medium transport and insurance costs.

### Education and Engagement

- Onsite and online formal and informal learning;
- Community "in-reach" required to extend audiences beyond those visiting. Co-curation with targeted groups. Formal engagement officers required.

### Commercial Opportunities

- Catering, retail, events, hire personnel required.

### Marketing

- Emphasis on local, regional, national marketing and international tourism and cultural industry. In particular, requirement to market within larger urban areas in South England, such as London, Bristol, Swindon and Bath.

### Development

- Classically diverse fundraising strategy - trusts, foundations, individual donations and corporate sponsorship;
- Necessity to quantify and cultivate Welsh diaspora. There is potential to ensure Amgueddfa Cymru's new membership scheme deploys best practice in building membership community;
- There is potential to develop a clear case for support for the corporate sector given the development of high profile infrastructure in a capital city.

### Building Maintenance

- Consistent and predictable facilities, maintenance and security costs in line with industry averages.

### Partners

- Cardiff Council (site identification, assistance with delivery, planning

process, integration with existing infrastructure, brokering partnerships, financial contribution to capital and likely ongoing revenue support)

- Government;
- Artes Mundi;
- Neighbouring facilities;
- Local cultural and educational partners in Cardiff;
- Local community groups;
- VAGW;
- Higher education;
- Creative Cardiff/Cardiff University/ Clwstwr Creadigol;
- Corporate Sector;
- International peers;
- BBC.

### Timescale

3-7 years

## Option 8: Outpost in Capital

Added Value to Wales	
Extends the capital's cultural tourism offer.	
Benefits visual arts sector in Cardiff by increasing visibility of the visual arts in the city	
Builds on the Clwstwr Creadigol (1 of 22 shortlisted) and contributes to the growth of the creative economy (Cardiff is 1 of top 10 creative cities).	
Contributes to Cardiff's Economic Plan.	
Provides positive economic impact through combined supply-chain and induced spending in local area including job creation, construction employment and additional visitor spend.	
Strengths	Weaknesses (see risks overleaf)
Delivers a fit-for-purpose building with high-quality design. It is not limited by the existing Amgueddfa Cymru site or infrastructure	Potentially limits impact for all of Wales
Provides new identity in locality.	While potentially benefiting from a high-profile opening, potentially difficult to sustain funding, profile and momentum
Provides regeneration opportunity for an area.	Places all investment in the Amgueddfa Cymru, while others in the visual arts sector do not benefit directly
Potential for attracting new audiences depending on location	
Focuses on modern and contemporary visual art, giving Amgueddfa Cymru a new platform for this discipline and enabling space to be freed up in the Amgueddfa Cymru.	
Affords short-term press opportunities.	
Potential to provide area regeneration if done correctly, strategically, coherently, kindly	
Sufficient regular temporary space enables exhibitions always to be on display to ensure no 'dark' weeks.	

## Option 8: Outpost in Capital

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Creates increased competition with existing visual arts and cultural offer in Wales, and Cardiff, and the region, specifically	Draw on existing collaborative ethos of the Amgueddfa Cymru curation/ collections teams to jointly develop vision for the extension that draws on local, regional national and international expertise in contemporary visual arts; Identify tangible ways in which the sector could co-deliver aspects of the programme to ensure it draws on existing cultural/creative/HEI assets in Cardiff-region (and nationally)	5	5	25
Atrophies the core offer and reduced visitation at Amgueddfa Cymru Cathays Park (Tate Modern/Tate Britain effect)	Develop clear plan for connecting sites through programming, exhibitions, education and marketing; Draw on collections at Amgueddfa Cymru Cathays Park to showcase interdisciplinary exhibitions; Partner with local authority to ensure place-making and routes to both venues (and wider offer in Cardiff) are clear	4	4	16
Lengthy negotiation	Develop collaborative partnership with all stakeholders at early stage, being transparent about anticipated barriers, risks and challenges and how these can be collectively addressed; Seek to understand developers and local authority's ambitions and how these connect to the out-post model, and what aspects of the outpost's ambitions are non-negotiable, critical-success factors. Consider collectively how these can be achieved. Ensure clear off-site programme is in place, drawing on cultural and community assets across Cardiff and the region; ensure these platforms are still used after the outpost opens.	2	4	8
Seen as un-innovative – simply copying every other visual arts gallery in the world	Ensure the design, place-making and content is Wales-specific; ensure any architectural competition focuses on this authenticity and the requirement that the gallery evoke a national, collaborative, transparent and open spirit in its physical design	4	4	16

## Option 8: Outpost in Capital

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Fails to innovate or invigorate the visual arts sector as a whole	Identify tangible ways in which the sector could co-deliver aspects of the programme to ensure it is national; Recruit a national board/entity of high-profile individuals with a track record for catalysing compelling change both in the visual arts and in any other industry. Consider rolling out other models identified in advance of opening that focus on collaborative, ambitious exhibitions/collections development across Wales	4	5	20
Potential delays could impact Amgueddfa Cymru visitation	Ensure clear off-site programme is in place, drawing on cultural and community assets across Cardiff and the region; ensure these platforms are still used after the outpost opens.	3	4	12



## Option 8: Outpost in Capital



V&A, London, UK  
Proposals for the V&A East, Sadler's Wells theatre, London College of Fashion and University College London on the Queen Elizabeth Olympic Park, London, UK



IMMA, Dublin  
The National Gallery of Ireland



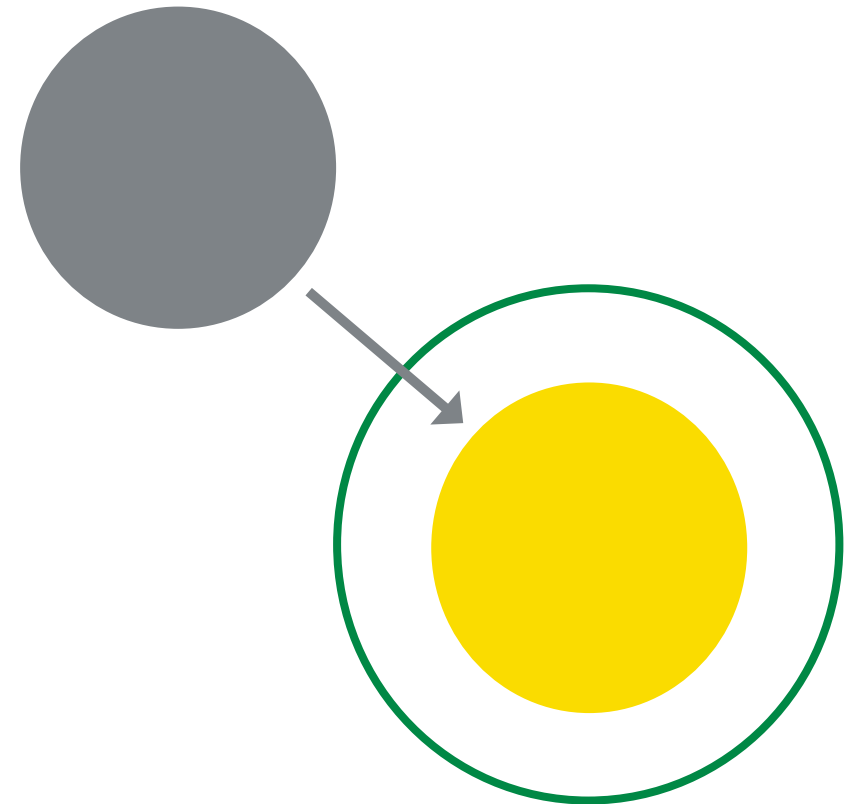
Scottish National Gallery of Modern Art, Edinburgh  
Scottish National Gallery, Edinburgh  
Scottish National Portrait Gallery, Edinburgh

## Option 9: Outpost Outside of Capital

**“There is a strong feeling in mid and north Wales that everything goes to Cardiff. There is an opportunity here to consider a solution to the location of a national gallery which is somewhat more devolved and capable of engaging audiences in the mid and west of the country through collaboration.”** Gallery Director

“We [cultural tourists] will go anywhere if there's something to see. If it feels like going to Tate Modern, going to Baltic, it if feels like going to any vast number of former industrial spaces coming out of their obsolescence as a white-cube space, then I'm reluctant to go there. It is a very common pattern. People are not going to

travel to Wales to see another Turner Contemporary-type thing, which is showing artists you've already see everywhere else.” Critic



## Option 9: Outpost Outside of the Capital

### Model Description

A sister gallery to the Amgueddfa Cymru, this Contemporary Art Centre provides ample space for the display of ambitious contemporary art outside of the capital.

Allows for architectural requirements to be established from 'scratch' and completely 'fit for purpose.' This could be located in a rural or urban area.

### Capital requirements

An iconic new build would cost iro £50million. This assumes and £5,000 per sqm and approximate GFA of 10500sqm.

For a more functional build cost iro 4,000 per sqm the preliminary budget would be approx. £42million.

### Operational components

#### Leadership and Team

- Centralised management but with greater flexibility and independence. A single visionary leader. In-house and guest curators.
- Limited potential for shared resource pool across visual arts ecology. However, can draw on existing expertise in contemporary art and design already employed at Amgueddfa Cymru.

### Programme and Exhibition

- Permanent exhibition installed once, with 5-10% flexibility for annual changeover.

- Temporary exhibition installed regularly (3 large per annum; 4-5 small per annum).
- Of the temporary exhibitions, 1-2 designed to tour nationally / internationally.

### Collections Mobility

- On set-up significant logistical requirements.
- On-going mid-scale costs associated with mobilising collection (i.e. permanent collection does not need to be de-installed when a temporary exhibition is shown, however national collection needs to be transported beyond Cardiff).
- Externally, medium costs associated with collections movement. Medium transport and insurance costs.

### Education and Engagement

- Onsite and online formal and informal learning.
- Community "in-reach" required to extend audiences beyond those visiting. Co-curation with targeted groups. Formal engagement officers required.

### Commercial Opportunities:

- Catering, retail, events, hire personnel required.

### Marketing

- Emphasis on local, regional, national marketing and international tourism and cultural industry.

### Development

- Classically diverse fundraising strategy - trusts, foundations, individual donations and corporate sponsorship
- Necessity to quantify and cultivate Welsh diaspora. There is potential to ensure Amgueddfa Cymru's new membership scheme deploys best practice in building membership community.

### Building Maintenance

- Consistent and predictable facilities, maintenance and security costs in line with industry averages.

### Partners

- Local authority (site identification, assistance with delivery, planning process, integration with existing infrastructure, brokering partnerships, financial contribution to capital and likely ongoing revenue support)
- Government
- Artes Mundi
- Neighbouring facilities
- Local cultural and educational partners
- Local community groups
- VAGW
- Higher education
- Corporate Sector
- International peers

### Timescale

3-7 years

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## Option 9: Outpost Outside of the Capital

Added Value to Wales	
Extends the cultural tourism offer, particularly if located on the Wales Way.	
Expresses confidence in the visual arts and raises its visual arts profile in and out of Wales.	
Alleviates the Cardiff-centric concerns amongst non-Cardiff-based audiences and organisations.	
Potential catalyst for regeneration outside of the capital.	
Provides a positive economic impact through combined supply-chain and induced spending in local area including job creation, construction employment and additional visitor spend.	

## Option 9: Outpost Outside of the Capital

Strengths	Weaknesses (see risks overleaf)
Delivers a fit-for-purpose building with high-quality design. It is not limited by the existing Amgueddfa Cymru site or infrastructure	Potentially limits impact for all of Wales
Provides new identity in locality.	While potentially benefiting from a high-profile opening, potentially difficult to sustain funding, profile and momentum
Potential for attracting new audiences depending on location	Places all investment in the Amgueddfa Cymru, while others in the visual arts sector do not benefit directly
Focuses on modern and contemporary visual art, giving Amgueddfa Cymru a new platform for this discipline and enabling space to be freed up in the Amgueddfa Cymru.	
Affords short-term press opportunities.	



## Option 9: Outpost Outside of Capital

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Creates increased competition with existing visual arts and cultural offer in Wales	Draw on existing collaborative ethos of the Amgueddfa Cymru curation/ collections teams to jointly develop vision for the extension that draws on local, regional national and international expertise in contemporary visual arts; Identify tangible ways in which the sector could co-deliver aspects of the programme to ensure it draws on existing cultural/creative/HEI assets in identified region	5	5	25
Lengthy negotiation	Develop collaborative partnership with all stakeholders at early stage, being transparent about anticipated barriers, risks and challenges and how these can be collectively addressed; Seek to understand developers and local authority's ambitions and how these connect to the out-post model, and what aspects of the outpost's ambitions are non-negotiable, critical-success factors. Consider collectively how these can be achieved. Ensure clear off-site programme is in place, drawing on cultural and community; ensure these platforms are still used creatively after gallery is open.	2	4	8
Seen as un-innovative – simply copying every other visual arts gallery in the world	Ensure the design, place-making and content is Wales-specific; ensure any architectural competition focuses on this authenticity and the requirement that the gallery evoke a national, collaborative, transparent and open spirit in its physical design. Consider rolling out other models identified in advance of opening that focus on collaborative, ambitious exhibitions/collections development across Wales	3	3	9

## Option 9: Outpost Outside of Capital



Hauser & Wirth, London, UK  
Hauser & Wirth, Somerset, UK



Louvre, Paris, France  
Louvre Lens, France



Newlyn Art Gallery, Newlyn, UK  
The Exchange, Penzance, UK

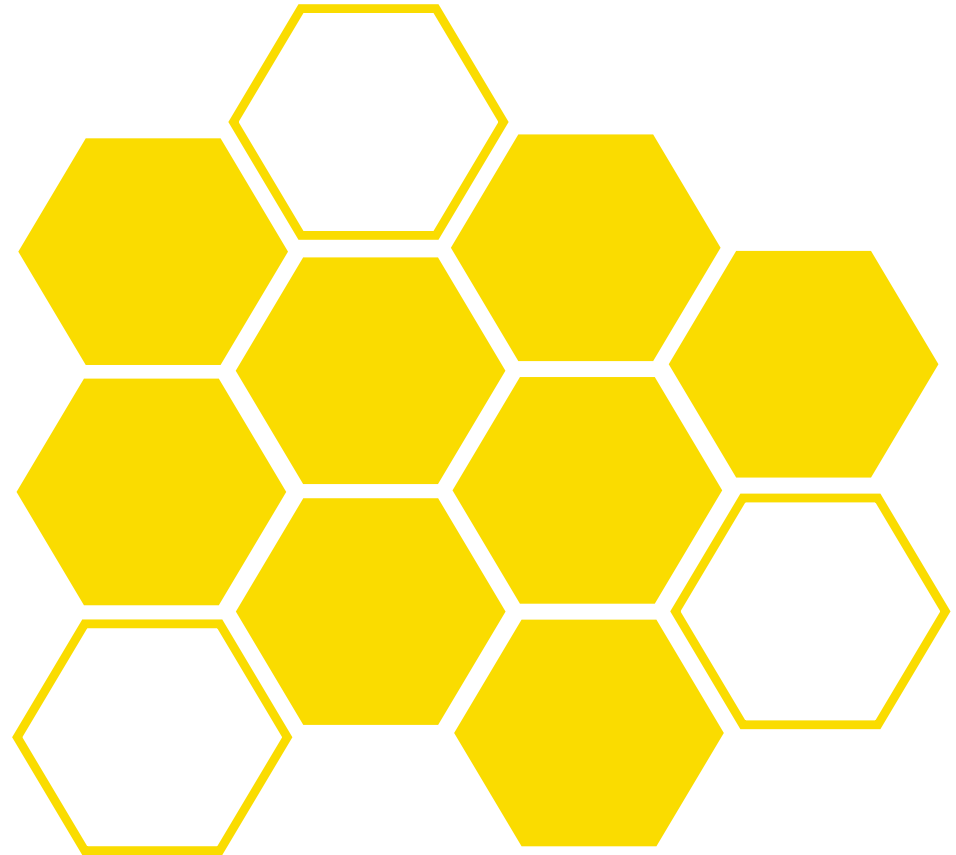


The Getty Center, LA, USA  
The Getty Villa Malibu, USA

## Option 10: Hive / Co-Location

**“We need an innovative mixed model with production space alongside traditional galleries – art has moved on.” Funder**

**“I think a hive is an interesting model, where there are activities that connect and interact in different ways.” Museum Director**



## Option 10: Hive / Co-Location

### Model Description

This is a vibrant mixed-used venue and creative hub, with multiple affiliates co-located on a single site. Affiliates have opportunities to collaborate and interact as much as work independently. It is a manifestation of the cultural supply-chain under one roof from training and production to cultural consumption and showcasing.

The hive 'curates' a portfolio of like-minded or complementary organisations including creative organisations, artist and makers studios, creative tech, creative entrepreneurs, social enterprises.

### Capital Requirements

This could be an existing building (including Amgueddfa Cymru Cathays Park), refurbishment or a new build.

The capital expenditure ranges from iro £25million for a refurbishment of an existing site to as much as £80million for a large mixed-use development.

### Operational Components

#### Leadership and Team

- Centralised management but tenants are autonomous entities.
- A single visionary leader. In-house and guest curators and creatives.
- Experienced coordinator (hive manager) charged with encouraging networking,

joint projects and exchanges.

- A platform for thought-leadership, R&D, knowledge exchange and skills development.
- Resources, specialist expertise and general support services (marketing, fundraising, infrastructure) are shared within the hive.

### Programme and Exhibition

- Permanent exhibition installed once, with 5-10% flexibility for annual changeover.
- Temporary exhibition installed regularly (3 large per annum)
- Of the temporary exhibitions, 1-2 designed to tour nationally / internationally.
- Small temporary exhibitions developed in coordination with affiliates and network partners. This include creatives, universities and social enterprises. Potential for 4-6 small per annum.

### Collections Mobility

- On-going mid-scale costs associated with mobilising collection (i.e. permanent collection does not need to be de-installed when a temporary exhibition is shown, however the national collection needs to be transported within or beyond Cardiff).
- Externally, medium costs associated with collections movement. Medium transport and insurance costs.

### Education and Engagement

- Onsite and online formal and informal learning.
- Community "in-reach" required to extend audiences beyond those visiting. Co-curation with targeted groups. Formal . informal engagement officers required.
- Opportunity for art school to be located in situ and for close collaboration with higher education (as at Science Gallery, Trinity College Dublin).
- Opportunities for artist in residence.

### Commercial Opportunities:

- Catering, retail, events, hire personnel required.
- A commercial officer that brokers relationships with all tenants.

### Marketing

- Emphasis on local, regional and national marketing.

### Development

- Classically diverse fundraising strategy - trusts, foundations, individual donations and corporate sponsorship.
- Potential to catalyse and attract investors interested in social impact and creative enterprise, particularly those with high-skilled growth opportunity.
- Necessity to quantify and cultivate Welsh diaspora.
- There is potential to ensure Amgueddfa Cymru's new membership scheme

deploys best practice in building membership community.

- Opportunity for

### Building Maintenance

- Consistent and predictable facilities, maintenance and security costs in line with industry averages.

### Partners

- Local authority (site identification, assistance with delivery, planning process, integration with existing infrastructure, brokering partnerships, financial contribution to capital and likely ongoing revenue support)
- Welsh Government
- Artes Mundi
- Neighbouring facilities
- Local cultural and educational partners
- Local community groups
- VAGW
- Higher education
- Corporate Sector
- International peers
- Social and creative enterprises
- Artists
- Start-ups
- Commercial galleries
- Retail spaces
- F&B

### Timescale

3-7 years

## Option 10: Hive / Co-Location

Added Value to Wales	
Delivers an unorthodox model for a national institution (co-located models are increasingly common, but not necessarily within heritage institutions).	
Shows forward-thinking, recognition of the power of collaborative creative industries to bolster the economy.	
Echoes cross-disciplinary education in schools and universities.	
Addresses and bolsters the visual arts ecology in Wales (education, art schools, commercial art market, artist and curatorial professional development).	
Showcases the cultural supply chain under one roof so can visibly pinpoint areas of innovation and skills gaps.	
Provides positive economic impact through combined supply-chain and induced spending in local area including job creation, construction employment and additional visitor spend.	
Cultivate local creative businesses and encourage them to give back to the community through local mentorship, training and fundraising.	



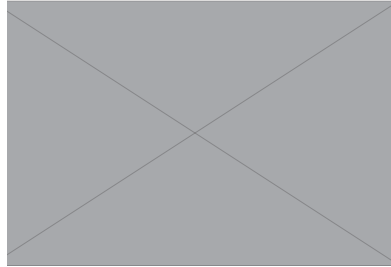
## Option 10: Hive / Co-Location

Strengths	Weaknesses (see risks overleaf)
Encourages co-working and collaboration between all tenants and as a result the opportunity for more interdisciplinary thinking and working.	Centralised offer at a single site.
Showcases the whole cultural supply-chain under one roof.	Lacks democratic access to collections across Wales.
Appeals to audiences as it has a 24/7 feel and adds to vitality of the area.	Requirement to get and keep the tenant spaces leased continually.
Potentially aids the arts ecology (education, art school, artist career development, collection building).	'Ghettoises' culture under one roof.
Revitalises an existing site with additional functions.	
Enables new opportunities, particularly for emerging artists and mid-career artists.	
Provides opportunities for shared income generation.	
Provides opportunities for shared resources, and expertise such as marketing, fundraising, education, conservation.	
Provides flexible spaces which can dynamically change organically over time.	

## Option 10: Hive / Co-Location

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Lacks clear identity	Develop clear vision and brand identity from outset; Use diverse portfolio of tenants as asset; Consider how best to differentiate (and communicate that differentiation) from vast number of co-location spaces opened/opening – leveraging role and position as a national venue – including visual arts happenings, performances, etc..	1	4	4
Too many separate agendas may result in inability to make clear decisions	Ensure collaborative creative leader is in place; Consider how separate agendas are an asset, and which components of the agenda must be shared in order to be a success	2	4	8
Not-national	Ensure the design, place-making and content is Wales-specific; ensure any architectural competition for a new space focuses on this authenticity and the requirement that the hive evoke a national, open spirit; Consider how aspects of the hive could be rolled out at other venues – off-site/ franchises/symposia/partnerships – and how they connect 'back in' to the central hive, and critically – how the central hive connects outward. Consider international partnerships with other world-class hives (e.g. Somerset House) and how hive organisations can connect to one another	4	4	16
Surplus of spaces that are not renting quickly	Ensure attractive proposition for all partners; Ensure lease agreements in place early in development process; Identify ideal composition of visual arts and non-visual arts portfolio (e.g. SMEs, social enterprises, tech companies).	3	5	15

## Option 10: Hive / Co-Location



Toronto Distillery, Toronto, Canada  
Snape Maltings, Aldeburgh, UK  
The Alliance Centre, Denver, USA

Andreas Hudelmayer, Maker Studio, Peckham Levels, UK  
F&B space, Peckham Levels, UK  
Science Gallery, Trinity College Dublin, Ireland

Winzavod, Moscow, Russia

Chapter, Cardiff, Wales  
Gallery, Chapter, Cardiff, Wales  
Somerset House Exchange

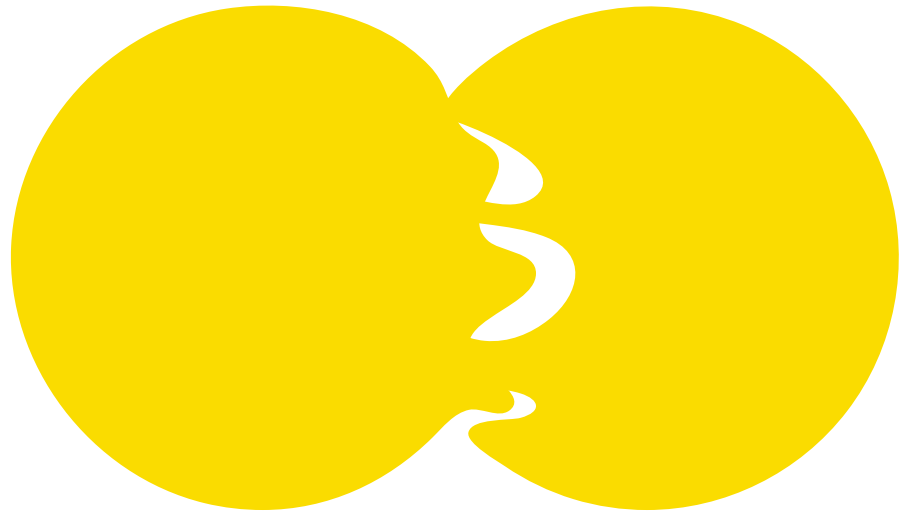
Strelka, Moscow, Russia

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## Option 11: Merger

**“More and more, we’re all going to survive by working together.”**

**Gallery Director**



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## Option 11: Merger

### Model Description

There may be an opportunity for two or more complementary and relatively equal organisations operating in the cultural and visual arts sector to merge formally (rather than simply partner) to jointly deliver a national entity of contemporary art.

This model is therefore best characterised as an 'operating option' that could be considered at the next stage. It is worth considering here given that in the cultural sector (as with all sectors) mergers are often raised as an option, particularly in times of limited or limiting resources, but are not fail safe (as shown by Scottish Ballet and Scottish National Opera 1999-2000).

### Capital Requirement

This is highly dependent on the operations of the institutions that merge. If housed in a building this could be an existing site, refurbishment, an extension or a new build.

The capital expenditure ranges from iro £25million to as much as £80million for a large mixed-use development.

### Operational Components

These are specific to and dependent on the institutions that merge.

### Timescale

3 - 7 years





## Option 11: Merger

Added Value to Wales	
To be determined	
Strengths	Weaknesses (see risks overleaf)
Potential to improve long-term shareholder value and overall company performance.	Potential loss of identity and heritage.
Provides shared resource, assets and capabilities result in reduced costs, as well as combining skill-sets.	Potential staff redundancies.
Offers refreshed branding opportunities.	Brand dilution.
There is potential to build/combine audiences.	Potential for infighting.
Limits competition for funds, talent and audiences.	Mismatch in audiences.
Increases press opportunities.	Potential need to compromise.
Increases governance pool.	Potential institutional exhaustion.
Provides backroom savings (for example, trimming marketing, cost of materials) created through the merger can be reinvested elsewhere.	
A merger and move to a purpose-built space has the potential to boost a company's national and international reputation.	
Multiple established institutions have the potential to be a magnet for other creative practices and entrepreneurs.	

## Option 11: Merger

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Loss of loyal audiences or stakeholders	Undertake audience and stakeholder mapping at outset; identify overlap between organisations; develop bespoke communications strategy for each stakeholder group; identify ways in which audiences can join in the merger journey	5	5	
Failure, with considerable resources, energy and ideas funnelled into a merger that is never realised successfully	Ensure honesty and clarity in early discussions about a merger – what the risks are, and how these are going to be mitigated; what the resource is required and how the organisation will need to be restructured; and positively develop a vision resulting from the merger that draws on strengths of both organisations. Actively revisit the risk assessment regularly as a team.			
Reduces individual organisational impact	Identify which aspects of the organisation's impact are critical to retaining and consider how to build these into the strategy.			
Over-stretches resources	Ensure the business model is pragmatic and clearly identifies required resource; test business model at feasibility stages to ensure it is robust			

## Option 11: Merger



HOME, Manchester, UK



MAS, Antwerp, Belgium



Milwaukee Art Museum, USA



Jeu de Paume, France

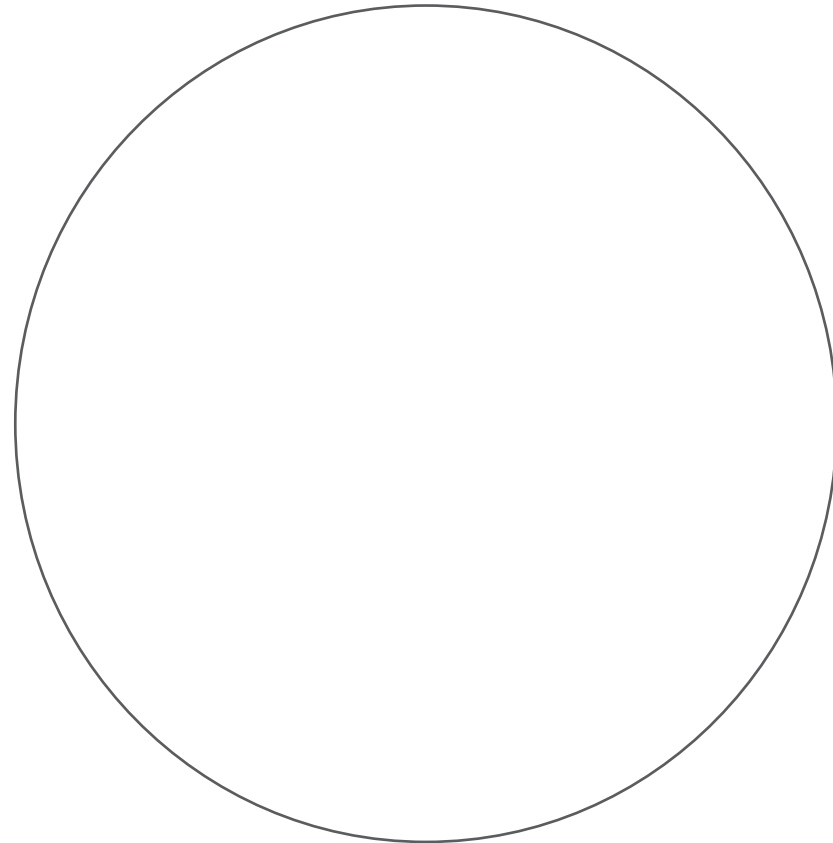
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## Option 12: Do Nothing

**“I was concerned that this is not the right time. A new physical presence in a fragile ecosystem could be devastating. There is already so much dynamic activity in Wales, why build something new?”** Museum Director

“The capital agenda for the government is pretty crowded at the moment.”

Funder





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## Option 12: Do Nothing

### **Model Description**

The Amgueddfa Cymru and visual arts sector continue as usual with no investment in or further development of a national entity of contemporary arts at this time.

This is not to say another action could not be taken. Instead it questions whether now is the right time for a new national entity, given the limited opportunities around and cuts to funding and political environment.

## Option 12: Do Nothing

Added Value to Wales	
Provides an opportunity for stakeholder organisations to clarify their role, ambitions and relationships for any future development.	
Strengths	Weaknesses
Offers opportunity for the visual arts sector to consider a more strategic advocacy role (e.g. through VAGW) and to pro-actively identify and address the sector's collective needs and ambitions (for example, through audience research)	Missed opportunities to inspire the next generation of artists, curators and audiences
Additional financial resource allocated for the feasibility study could be put toward further strengthening and/or promoting existing visual arts ecosystem.	Further exacerbates consulting fatigue. The four-month consulting process results in little action, which confirms existing attitudes.
Gives refreshed opportunity to focus on key strategic relationships, between organisations such as VisitWales, Arts Council Wales and MALD	Missed opportunity to 'leap-frog' cultural infrastructure investment trends around the world and deliver an authentic and ambitious new experience for Wales
Presents no threat of destabilising existing offer (at least not as a direct result of a national contemporary art gallery).	Fails to collectively build cultural tourism marketing.
Avoids failure.	Loses designated funding. It is not ring-fenced for the visual arts and will be reallocated.
Provides opportunity to increase potential funds from government.	
Provides opportunity to review the collection fund and collecting priorities.	
Provides opportunity to review and strengthen partnerships between institutions.	

## Option 12: Do Nothing

Risks	Mitigation	Likelihood of occurring (1=low, 5=high)	Impact if it occurs (1=low, 5=high)	Risk Score
Visual arts further destabilised – not least by consulting fatigue	<p>Identify outcomes of this consulting process that can be used to develop the sector; Encourage MALD, ACW, Amgueddfa Cymru, Visit Wales, VAGW and others outside of those entities to consider findings and recommendations from this study and what could be put in place to address sector challenges.</p> <p>Ensure study findings are shared with sector, and particularly those that have given of their time and insights in the consulting process – to enable them to identify how their own strategies could address or further build on the shared ambition identified in the process.</p>	4	5	20
Lost funding opportunity	Encourage sector to prepare proposal for how any funding that had been set aside for a national entity could be reallocated in an ambitious way without delivering a visual arts national gallery	5	5	25

## Options: Indicative Capital Costs

Build Type	Public Non-Collection (sqm)					Public Collection (sqm)		
	External	Entrance	Social Spaces	Amenities	Learning	Permanent	Temporary	Community
<b>Iconic New Build</b>	800	600	400	220	480	2000	1200	500
<i>Signature Architect</i>	<b>PNC Total: 2500</b>					<b>PC Total: 3700</b>		
<i>Mid-range</i>	<b>PNC Total: 2500</b>					<b>PC Total: 3700</b>		
<i>Functional Build</i>	<b>PNC Total: 2500</b>					<b>PC Total: 3700</b>		
<b>New Extension - Cathays Park Site</b>	300	200	200	120	120	1200	1200	100
<i>Functional Build</i>	<b>PNC Total: 940</b>					<b>PC Total: 2500</b>		
<b>Large New Extension - Distributed Site</b>	300	200	200	100	120	0	1200	100
<i>Mid-range</i>	<b>PNC Total: 920</b>					<b>PC Total: 1300</b>		
<b>Medium New Extension - Distributed Site</b>	200	200	60	60	80		800	
<i>Mid-range</i>	<b>PNC Total: 600</b>					<b>PC Total: 800</b>		
<b>Small New Extension - Distributed Site</b>	200	100	60	60	60	0	300	0
<i>Mid-range</i>	<b>PNC Total: 480</b>					<b>PC Total: 300</b>		
<b>Large Refurb - Distributed Site</b>	0	0	0	0	0	0	1200	0
<i>Mid-range</i>	<b>PNC Total: 0</b>					<b>PC Total: 1200</b>		
<b>Medium Refurb - Distributed Site</b>	0	0	0	0	0	0	800	0
<i>Mid-range</i>	<b>PNC Total: 0</b>					<b>PC Total: 800</b>		
<b>Small Refurb - Distributed Site</b>	0	0	0	0	0	0	300	0
<i>Mid-range</i>	<b>PNC Total: 0</b>					<b>PC Total: 300</b>		
<b>Large Moving Temporary Structure</b>	40	40	40	20	60	0	300	0
<i>Mid-range</i>	<b>PNC Total: 200</b>					<b>PC Total: 300</b>		
<b>Small Moving Temporary Structure</b>	40	25		20		0	200	0
<i>Mid-range</i>	<b>PNC Total: 85</b>					<b>PC Total: 200</b>		

Figure 54: Preliminary capital costs for contemporary art gallery based on current sqm rates (in line with international benchmarks).

## Options: Indicative Capital Costs

Non-Public Collection (sqm)				Non-Public Non-Collection (sqm)				NFA Total (sqm)	5%	GFA Total	Cost pm2 (£)	Preliminary Budget (£)
Collection Storage	Conservation	Exhibition Storage	Transit	Offices	Technical	Kitchens / Retail Store Etc	Plant					
1000	250	300	250	200	300	300	1200					
<b>NPC Total: 1800</b>				<b>NPNC Total: 2000</b>				10000	500	10500	£7,000	<b>£73,500,000</b>
<b>NPC Total: 1800</b>				<b>NPNC Total: 2000</b>				10000	500	10500	£5,000	<b>£52,500,000</b>
<b>NPC Total: 1800</b>				<b>NPNC Total: 2000</b>				10000	500	10500	£4,000	<b>£42,000,000</b>
0	0	400	250	150	100	200	600					
<b>NPC Total: 650</b>				<b>NPNC Total: 1050</b>				5140	257	5397	£4,500	<b>£24,286,500</b>
300	0	400	250	80	100	200	450					
<b>NPC Total: 950</b>				<b>NPNC Total: 830</b>				4000	200	4200	£4,000	<b>£16,800,000</b>
200	0	200	200	40	60	80	300					
<b>NPC Total: 600</b>				<b>NPNC Total: 480</b>				2480	124	2604	£4,000	<b>£10,416,000</b>
100	0	100	100	20	40	40	200					
<b>NPC Total: 300</b>				<b>NPNC Total: 300</b>				1380	69	1449	£4,000	<b>£5,796,000</b>
0	0	400	0	10	30	0	20					
<b>NPC Total: 400</b>				<b>NPNC Total: 60</b>				1660	83	1743	£4,000	<b>£6,972,000</b>
0	0	200	0	10	30	0	20					
<b>NPC Total: 200</b>				<b>NPNC Total: 60</b>				1060	53	1113	£4,000	<b>£4,452,000</b>
0	0	100	0	10	30	0	20					
<b>NPC Total: 100</b>				<b>NPNC Total: 60</b>				460	23	483	£4,000	<b>£1,932,000</b>
0	0	40	0	10	10	40	20					
<b>NPC Total: 40</b>				<b>NPNC Total: 80</b>				620	31	651	£3,500	<b>£2,278,500</b>
0	0	0	0	10	10	0	20					
<b>NPC Total: 0</b>				<b>NPNC Total: 40</b>				325	0	325	£3,000	<b>£975,000</b>





## Appendix 6: Vision and Mission Examples



## Appendix 7: Vision and Mission Examples

Arts Organisation	Description	Vision	Mission
<b>National Galleries (Historic, Modern and Contemporary)</b>			
Tate, UK	Tate reinvented the idea of a gallery from a single institution to a branded collection of experiences - a series of destinations that attract audiences and democratise culture. It houses the UK's national collection of British art, and international modern and contemporary art. It is a network of 4 art galleries: Tate Britain, Tate Liverpool, Tate St Ives, ) and Tate Modern, with a complementary website, Tate Online (1998).	Tate is a champion of art and its value to society. It believes that an understanding of the visual can enrich all our lives and that artists make a special contribution to the community. Tate therefore has the ambition to make us all aware of the significance of the visual in contemporary life and how artists help us to see and interpret the world.	To increase public knowledge, understanding and appreciation of British art from the sixteenth century to the present day and of international modern and contemporary art.
National Theatre Wales, Wales, UK	Created in 2008, NTW is a flexible, non-building based organisation that offers imaginative theatrical productions, facilitates a spirit of collaboration, raises the international profile of the best work created in Wales, nurture talent and reflects and comments on the culture and society of Wales, past and present. It aims to connect with Welsh audiences and make world-class theatre more accessible, especially for those who do not attend mainstream theatre.	Creating extraordinary experiences: for Wales and the world	<p>"The nation of Wales is our stage: From forests to beaches, from aircraft hangars to post-industrial towns, village halls to nightclubs. We bring together storytelling poets, visual visionaries and inventors of ideas. We collaborate with artists, audiences, communities and companies to create theatre in the English language, rooted in Wales, with an international reach. You'll find us around the corner, across the mountain and in your digital backyard."</p> <p>We consider it our responsibility, as a national company to help nurture artists, small companies and the creative sector in Wales; to position Wales at the forefront of digital creativity; to lobby funders to invest in the cultural and creative sector in Wales; and to find new ways to encourage creativity among young people and in areas of economic and social disadvantage.</p>
Scottish National Gallery, Scottish National Portrait Gallery, Scottish National Gallery of Modern Art, Scotland, UK	NGS comprises three galleries in Edinburgh and two partner galleries in the North and South of Scotland (Paxton House and Duff House). NGS looks after one of the world's finest collections of Western art ranging from the Middle Ages to the present day. These holdings include the national collection of Scottish art which is displayed in an international context.	NGS to be a powerhouse for art: inclusive, original and ambitious, making the collection accessible to all and inspiring curiosity across the world.	<p>Ensure that the public has the greatest possible access to the visual arts; that we educate and inspire the public; and that we promote Scotland's international reputation for art and culture, both in the quality of our collections as well as the strength and depth of our art community.</p> <p>We care for, preserve and add to the objects in our collections; ensure that the objects are exhibited to the public; ensure that the objects are available to persons seeking to inspect them in connection with study or research; and generally to promote the public's enjoyment and understanding of the Fine Arts; for those purposes to provide education, instruction and advice and to carry out research.</p>
National Gallery, London, UK	Founded in 1824, the National Gallery houses a permanent collection of over 2,300 paintings dating from the mid-13th century to 1900 that tell a coherent story about the development of Western European art.	To establish a central role for old master paintings in modern cultural life.	To preserve the collection by maintaining the highest standards of care and conservation, to enhance the collection by acquiring great pictures and to display it in a sensitive manner for the enjoyment and understanding of the public.

## Appendix 7: Vision and Mission Examples

Arts Organisation	Description	Vision	Mission
National Gallery of Ireland, Dublin, Ireland	The gallery houses the national collection of Irish and European art. The Gallery has an extensive, representative collection of Irish paintings.	An outstanding experience that inspires an interest in and an appreciation of art for all	To care for, interpret, develop and showcase art in a way that makes the National Gallery of Ireland an exciting place to encounter art.
Irish Museum of Modern Art, Dublin, Ireland	IMMA is Ireland's National Cultural Institution for Contemporary Art. It is home to the National Collection of Irish and International Modern and Contemporary Art, now numbering over 3,500 artworks. The programme comprises exhibitions, commissions and projects by leading Irish and international artists, as well as an engagement and learning programme which together provides audiences of all ages the opportunity to connect with contemporary art and unlock their creativity.		Re-connect audiences and art, providing an extraordinary space in Ireland where contemporary life and contemporary art connect, challenge and inspire on another. IMMA shares, develops and conserves the Irish National Collection of Modern and Contemporary Art for now for the future.
Museo Reina Sofía, Madrid, Spain	The museum comprises different venues, different experiences and audiences. It specialises in the best of Spanish art and offers a mixture of national and international temporary exhibitions in its many galleries, making it one of the world's largest museums for modern and contemporary art.	To provide a collective search with non-authoritarian and non-vertical forms of cultural action, facilitating platforms for visibility and public debate.	The program is based on a redefinition of the function of museums.... The museum is a place for debate and research. [It is] conceived to be a place that generates opportunities for sociability and discussion in the public sphere.
National Gallery of Art, Washington, USA	Preserving ,collecting, exhibiting, fostering understanding	Provide people with tangible reminders of the power of the human spirit and the beauty of artistic expression.	The mission of the National Gallery of Art is to serve the United States of America in a national role by preserving, collecting, exhibiting, and fostering the understanding of works of art at the highest possible museum and scholarly standards.
National Gallery of Victoria, Melbourne, Australia	Australia's oldest, largest and most visited art museum, housing an encyclopedic art collection across two sites .	As Victoria's cultural flagship and home to Australia's finest art collection the NGV will be recognised as one of the leading art museums of the world.	To illuminate life by collecting, conserving and presenting great art.
National Gallery of Australia		An inspiration for the people of Australia	To develop and maintain a national collection of works of art; exhibit, or make available for exhibition by others, works of art from the national collection or works of art that are in the possession of the Gallery, and; see every endeavour to make the most advantageous use of the national collection in the national interest.

## Appendix 7: Vision and Mission Examples

Arts Organisation	Description	Vision	Mission
Regional Contemporary Art Museums			
Serpentine/ Serpentine Sackler, UK	Two exhibition spaces: the Serpentine Gallery and the Serpentine Sackler Gallery. With no permanent collection, the Serpentine and the Serpentine Sackler maintain a reputation by constantly offering new, exciting and prestigious exhibitions. Alongside a seasonal exhibition programme, it presents an annual Pavilion in the Summer. Programmes are complemented by outdoor sculpture projects, artist commissions, digital commissions, public and educational programmes, and major outreach projects.	To make the Serpentine not just a place where art is seen, but an artist-led space in which ideas and solutions are born.	The Serpentine promotes the understanding of art, architecture and design, and the way in which these fields intersect with other disciplines, through its exhibitions, architecture, design, education and public programmes as well as its digital projects
Turner Contemporary	A visual arts organisation to contextualise, celebrate, and build on JMW Turner's association with Margate. It acts as a catalyst for the regeneration of Margate, aiming to reinvigorate civic pride and inspire people to broaden their horizons and achieve their full potential.	Art Inspiring Change	Celebrating artists, creativity and learning through an ambitious programme of excellence, Turner Contemporary in Margate enriches lives and inspires confidence to lead transformation
Nottingham Contemporary	A contemporary art gallery committed to excellence, experimentation, ambition and innovation. The gallery promotes research, exchange and dissemination of ideas inspired by today's art practices across disciplines and cultures. It works with a wide range of partners and supports the creative and critical empowerment of artists and audiences.	We believe that contemporary artists offer extraordinary perspectives on contemporary society.	Nottingham Contemporary is an international art centre with a strong sense of local purpose.
SFMOMA, San Francisco, USA	Modern art museum holding an internationally recognised collection of modern and contemporary art. It is international in scope, while reflecting the distinctive character of the region. The museum's exhibitions and programs present and interpret compelling expressions of visual culture.	Not identified.	SFMOMA is dedicated to making the art for our time a vital and meaningful part of public life. For that reason we assemble unparalleled collections, create exhilarating exhibitions, and develop engaging public programs. In all of these endeavors, we are guided by our enduring commitment to fostering creativity and embracing new ways of seeing the world.
MOMA, New York, USA	To educate the public on Modern art	To be the most engaging museum of modern and contemporary art – for everyone	To collect preserve, study, exhibit and stimulate appreciation for and advance knowledge of works of art that collectively represent the broadest spectrum of human achievement at the highest level of quality, all in the service of the public and in accordance with the highest professional standards..



## Appendix 7: Vision and Mission Examples

Arts Organisation	Description	Vision	Mission
Stedelijk Museum voor Actuele Kunst, SMAK, Ghent, Belgium	Stedelijk Museum voor Actuele Kunst is renowned for its permanent collection and for its provocative exhibitions. It puts the artist at the heart of its actions. It presents itself as a place of experiment.	Dynamic and unconventional. Keeping a finger on the pulse. But sometimes on the sore points too.	To establish an independent museum that focused on contemporary trends in the art world.
Palais de Tokyo, Paris, France	Palais de Tokyo is a museum dedicated to contemporary art situated in the western wing of the Museum of Modern Art of the City of Paris. It is one of the largest venues devoted to the art of our time in Europe, with its 22,000sqm exhibition space. It is dedicated to both emergent and established artists from France and the world.	Palais de Tokyo is the dynamic place for the artists of our time.	Driven by the desire to change our vision of art, the Palais de Tokyo invites us to bear witness to the audacities of our time and to live the experience of art in the making, in all its guises.
Contemporary Art Museum of Estonia, Tallinn	An alternative art space in a former office building on a deck of a boiler house. is a self-established non-profit initiative, that positions itself between official state-run institutions and an artist-led initiative. It is an unconventional concept of a contemporary art museum that works towards producing, exhibiting, collecting and popularising local and international contemporary art while altering the prevailing working methods of established art institutions. It is a tool of self-establishment for younger generation artists, curators and art students.	A means of self-institutionalisation for the artists and curators of younger generation.	To be an intermediary between official art institutions and alternative galleries, and to keep asking what should be the true nature of a contemporary art museum?
Van Abbe Museum, Eindhoven	The contemporary art gallery houses a collection of around 2,700 artworks from 1909 to today. it takes an experimental approach towards art's role in society and challenges audiences to think about art and its place in the world. International collaboration and exchanges have made it a place for creative cross-fertilisation.	Not identified.	To think about art's place in the world through a range of subjects, including the role of the collection as a cultural 'memory' and the museum as a public site. Openness, hospitality and knowledge exchange are important to us.