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Contemporary art museums in Europe

A comparative study on their stakeholder management

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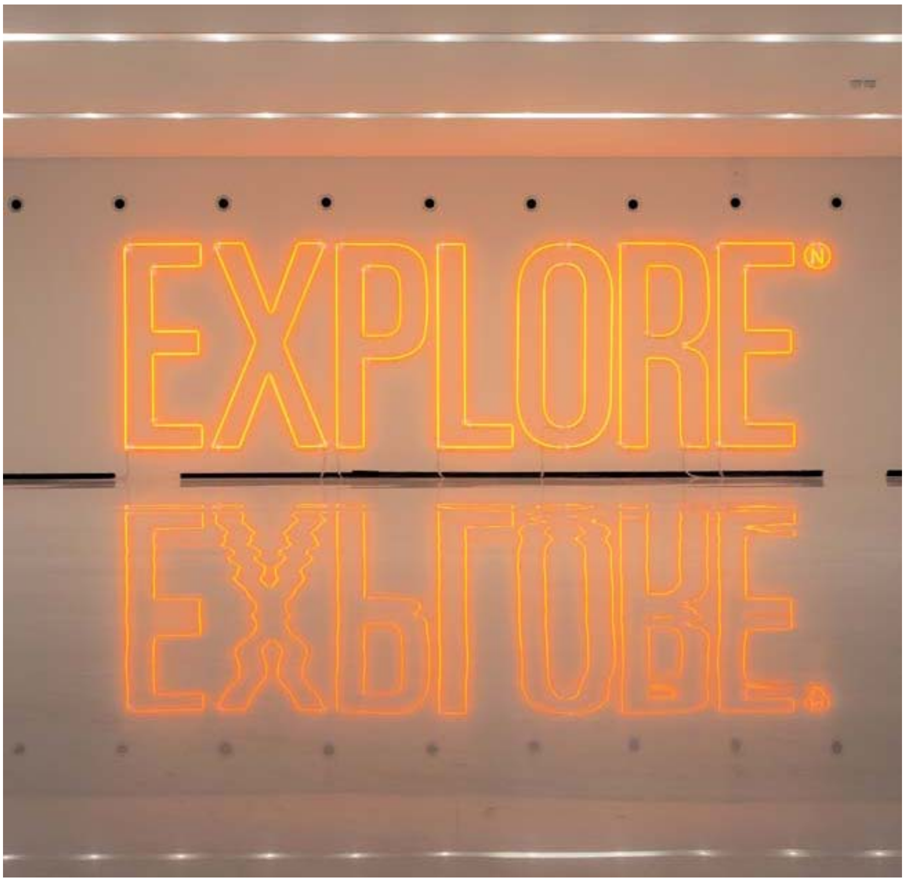


Maurizio Nannucci, **Explore, neon,** 2005 (Galleria Fumagalli, Bergamo)

"What do you expect from an art institution in the 21st century?"
"The museum in permanent transformation – the museum in an oscillation between object and process – the multi-identitarian museum – the museum in the move – the museum as a risk – taking pioneer – the museum as a locus of crossing of art and life – the museum as a laboratory – the museum based an a dynamic concept of art history – a dynamic centre of profound transformations"

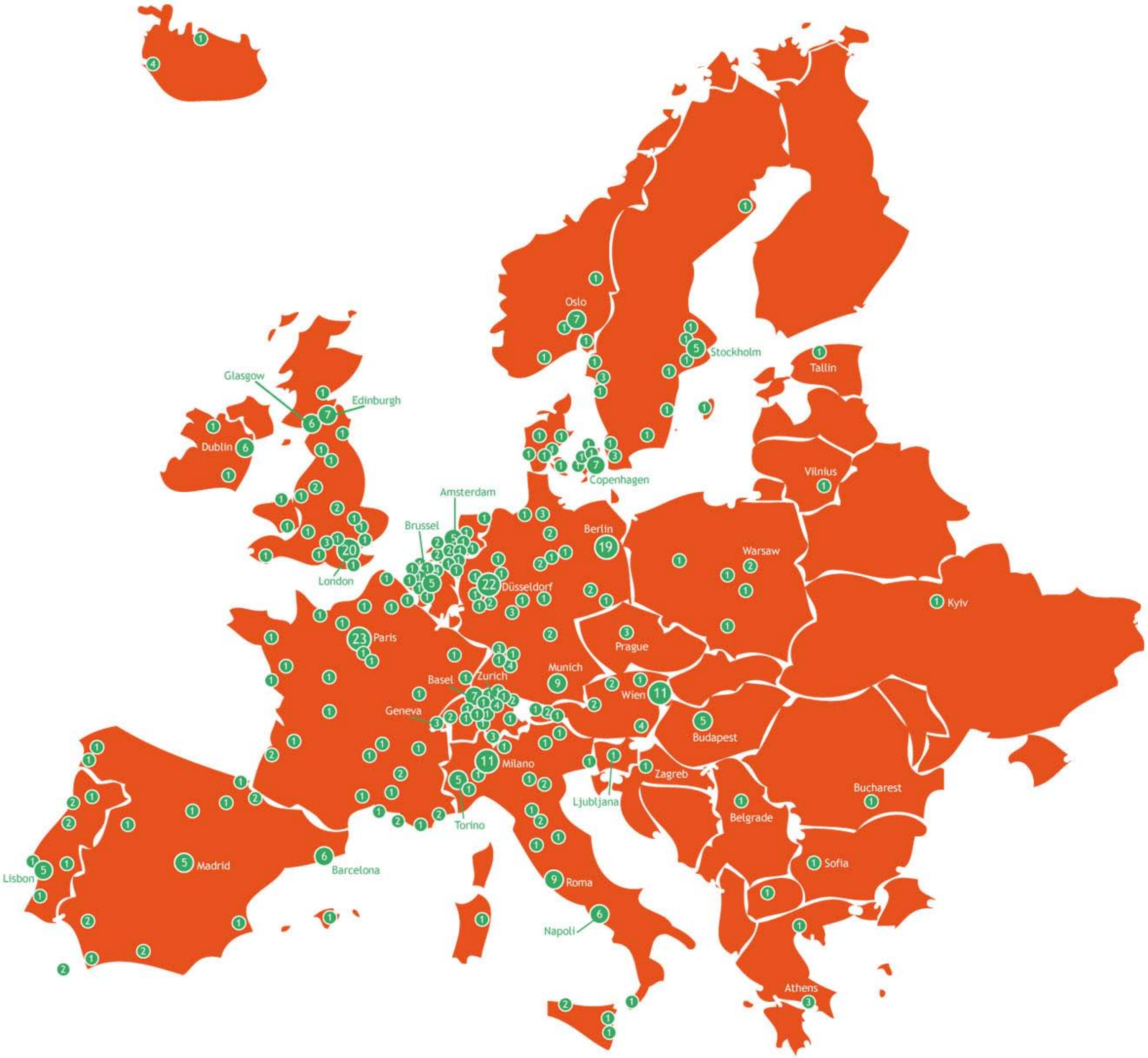
Hans Ulrich Obrist

1. Premises

In the last 30 years Europe has experienced a proliferation of contemporary art museums. They have been recognized as powerful tools for a wide range of activities and goals, from education to entertainment, from the enhancement of local art systems to urban regeneration (Evans, 2005). Three referential models have been developed: the first one is axed on the iconic presence of architectures and special building, whose eloquence more often overwrites collections and related events. The second one empowers the collections and the related curatorial activities in "white box" settings, producing utopian spaces that emphasizes the intrinsic and historical value of collections. The third is more directly engaged with its surrounding communities, and exploits collections mainly looking at their capability of determining positive social fallouts (in terms of education, identity, participation).
All these models are finalized at marking the auratic value of arts but this common purpose is pursued with means, strategies and structures that not only evolve along diverging path but also produce completely different meanings and social consequences. This divergence is wide and growing to the point that the meaningfulness of the common definition of "museum" needs to be discussed, while the conservative and "mnemonic" dimension of museum activities are fading into a wider set of cultural and personal services.
Despite these huge contradictions, the wave of creation of contemporary art museum is continuing. An analysis on data published by the most relevant architectural Italian reviews[1] reveals the construction of more than 200 new museums (with an exhibitions surface of 2.500 square meters or more) between 1995 and 2008. The present concentration of institutions (456 museums and art spaces in Europe) is clearly represented by the following map[2].

[1] Domus, Il Giornale dell'Arte, Il Giornale dell'Architettura, Casabella.
[2] Source: own analysis on Art Forum - Art Guide, 2008.

Figure 1 – Diffusion of the main contemporary art museums and spaces in Europe.



The diffusion and the dimension of this phenomenon raises a whole set of questions related to the nature, the diversity, the mission, the positioning and the perspective evolution of these institutions.
Is it possible to consider them as a unique population or the intrinsic differences of the institutions are producing divergent "herds"? Is it possible to identify different migration trajectories that lead institutions to new identities? Which are the main challenges that define the evolution of the positioning of the contemporary art museums in Europe?
These are the questions orienting the research presented in this paper, which is part of a project shared with Triennale di Milano, a leading institution for contemporary arts and design.
In the first part of the paper, the theoretical frame that defines the main axes of the museum positioning will be discussed within a consideration of the value creation process of museums. These theoretical statements will be exemplified through the construction of a first empirical taxonomy.
The second part will present the methodological and research issues that oriented the data gathering activities and the choices of the considered cases.
In the third part a short outline of the main evidences extracted by the different European museum cases will be presented.
In the last part we'll draw some conclusions identifying further research possibilities.
The research reveals that it is possible to stylize different typologies of contemporary art museum whose institutional shape has a high impact on:

a. the expectations from cities and citizenship in terms of social and urban impact of art policies;
b. the relationship with the art system (in terms of production scale, prices, actors) at a local and international level;
c. the investment on customer needs in terms of service sophistication, emotional experience, integration between arts and languages.

2. Value dimensions and positioning of contemporary art museums in Europe

The value produced by cultural institutions is characterized by a multi-dimensional status (Mazzanti 2002): it may be accounted in terms of merit value (recognized by professionals and experts in specific fields), public value (typical of public goods, recognized by citizens and institutions), and market value (perceived by different kinds of users and customers). Museums are producing - and sometimes selling - intangible and "auratic" assets and have a revenue model in which gifts, sponsorships, public contributions and direct revenues have to be managed jointly. Therefore, they need to be managed in the perspective of a multiple stakeholder approach, more than any other "market oriented institution". (Post J.E., Preston L.E. & Sachs, S. 2002). Each museum finds in fact its positioning and its independence through a complex mediation among different competitive arenas (Baia Curioni 2005, 2008):

- **the art system**: a social field defined by the action of different and stratified gatekeepers, critics, curators, collectors, stating the value of the institution, of its collections and cultural proposals.
- **the civic communities** (representative and institutional actors) and public institutions (local and national public authorities) regulating the social, economic

and urban environment of the museums and more often granting the museum their financial support.
- **visitors and corporations** using the museums and their cultural offer for different purposes (leisure, education, entertainment, marketing etc.) sustaining the activities through tickets, merchandising, brand licensing, memberships, sponsorships, property rights management etc.

Each museum states its competitive position defining stratified systems of exchange in order to fulfill the needs of the different stakeholders operating in the various competitive arenas. Through these systems, museums position themselves in order to negotiate the financial and intangible resources they need.
In this perspective, museums positioning needs to be investigated multi-dimensionally, combining static and dynamic perspectives and considering on the one hand the ongoing contemporary art system transformation, on the other the wider economic challenges affecting the different actors' behavior.

3. Methodological issues

The research concentrates on the perception that contemporary art museums have of the evolution of their context and the transformation of the competitive arena on which they have to struggle for acquiring their budgets. The research group collected qualitative and quantitative information in order to build up, on the one hand, a preliminary positioning scheme, useful to compare the institutions at a detailed level; on the other, a homogeneous dataset concerning the museums' activity.
In a first phase, ten main European museums have been selected for a benchmark analysis. The research panel was organized through in-depth cases with access to sensitive data, which are treated consistently with the privacy statements of the institutions. Individual meetings were scheduled with the directors, members of the managerial staff or with curators[3].
The choice of the case studies was based on different elements: mission and dimension of the museum; nature and dimension of the collection; connection with the urban context; characterization of the offering system; and, finally, willingness of the institution to share information.
Although each institution has a very specific biography, linked to the particularity of the context where it is located, all of them have been part of the restructuring process of European metropolis where cultural policies have been playing a central role in the urban agenda (Bianchini Parkinson 1993). A huge investment has been placed on urban amenities, because of a paradigm shift which envisions consumption as one of the main drivers of urban growth (Florida 2004, Clark 2004, Glaeser 2006). The "Bilbao Effect" (Plaza 2000 and Richard Florida 2004) has crystallized the debate around the crucial role of museums and urban amenities in order to build a successful creative city. But behind the allure of creative cities and their flagship-designed buildings, museums are

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[3] Interviews took place between November 2008 and February 2009. We would like to thank all those we met and their collaborators for their precious help and support. In particular: Gianfranco Maraniello (Director, MAMbo), Thierry Raspail (Director, MAC Lyon), Bart De Baere (Director, MuHKA), Fausto De Lorenzo (Managing Director Fond. Beyeler), Katia Baudin Renau (Deputy Director, Ludwig), Maria Bidaurreta Zabala (Head of External Relations, Guggenheim Bilbao), Chus Martinez (Chief Curator, MACBA), Philomena Byrne (Head of Public Affairs, IMMA), Christoph Grunenberg (Director, Tate Liverpool), Donald Hyslop (Head of Regeneration and Community Partnerships, Tate Modern).

facing the impact of the crisis of the welfare state and the pervasive role of the contemporary art market.
Interviews were structured in two main parts, following a checklist: the first section was aimed at defining the mission and the positioning of the institutions with regard to the three main clusters of stakeholders identified (contemporary art system, local communities and private markets); the second one was more specifically aimed at understanding and comparing the actions and resources managed by the museum, their quality and governance (definition of the offer, human resources, economics, governance processes, marketing and branding, services, architecture). Each interview lasted about one hour and a half.

Table 1 – Benchmark museums, interviews

Institution	City
Fondation Beyeler	Basel
Guggenheim Museum	Bilbao
IMMA - Irish Museum of Modern Art	Dublin
MAC - Musée d'Art Contemporain	Lyon
MACBA - Museu d'Art Contemporani de Barcelona	Barcelona
MAMbo - Museo d'Arte Moderna di Bologna	Bologna
MuHKA - Museum van Hedendaagse Kunst Antwerpen	Antwerp
Museum Ludwig	Koln
Tate Liverpool	Liverpool
Tate Modern	London

In particular, the museums' positioning was analyzed considering three main aspects, and monitoring their dynamic evolution during the institutions' lifecycle: the collection, the artistic production and the architecture, considering its role in the urban context.
The second part of the analysis was focused on more quantitative data. Some Italian institutions were added to the panel in order to have more terms of comparison.

Table 2 – Additional Italian contemporary art institutions

Institution	City
Castello di Rivoli	Torino
GAM - Civica Galleria d'Arte Moderna e Contemporanea	Torino
MART - Museo di Arte moderna e contemporanea di Trento e Rovereto	Rovereto
GAMeC - Galleria d'Arte Moderna e Contemp. di Bergamo	Bergamo
Triennale di Milano	Milano

4. Main evidences

4.1. Museums' positioning

Different policies concerning collections, temporary exhibitions, buildings and relationships with the urban system, have emerged from our study.

Collection
We can distinguish between more experimental collections, built with young emerging artists (or artists not known by the general public), and consolidated collections, containing historicized works and often focused on specific periods or themes. Between these two poles, we find a wide spectrum of possibilities, depending also on the economic resources that the institution can destine to its activity.

	Experimental *Scouting*	***Consolidated*** *Well-established artists*
Low budget	Local	
Medium budget	New artists	Consolidated artists
High budget	Global	

Collections are the main asset of museums. Most of them were born with the impulse of a relevant donation, or in response to the need to enhance a public collection. Then, contemporary art museums tend to develop their offer around the body of work of each collection.
Each museum defines its acquisition policy in order to develop the collection by donation or by purchase. Although the acquisition of a museum can have a better impact on the career of a single artist than a private acquisition, museums are loosing their capability to develop without the support of private collectors: the increasing values of contemporary artworks on the market are weakening their buying power.
Evidently, the budget dimension strongly influences the acquisition policy. Our investigation clearly underlines the polarization between museums managing high budgets, with the possibility to compete in the market arena, and those having limited means.
The scarcity of resources drives museum to invest in the art field buying pieces of artist which are far away from being consolidated in the market. This policy promotes the role of museums as gatekeepers in the art field; the goals of this scouting activity are to support emerging artist and, hopefully, to build a collection that can become an investment for the future. For example, in the past years MuHKA has been able to buy different emerging artists which are now strengthening their position in the market.
On the contrary, museums with a stronger budget (in general, national museums have higher budgets than local museums) can focus their policy on the acquisition of consolidated artists. They have the option to consolidate their collection with different cultural lines, acting as gatekeepers or reinforcing the body of work of specific artists or periods.
Today, the debate about the autonomy of museums from the market is mainly linked to acquisitions: the significant role of donors in enabling museums to acquire recognized artists creates a conflict of interests between the independence of the institution and its linkages with the market. If a museum, for example, buys a certain artist, it gives a signal and it influences the market in a context of great asymmetry. Even if there is general awareness about this issue in museum management, no rule has been introduced to reinforce the independence of museums.
The impact of the collection strategy on exhibitions is also relevant. In fact, the possibility to produce exhibitions with consolidated artists improves the attractiveness of the museum for visitors. On the contrary, emerging artists are less successful on the demand side, but they can eventually reinforce the role of a museum as a gatekeeper toward the art field and the specialized audience.

Artistic production (temporary exhibitions)
At the two extremes, we can distinguish between institutions of research, producing new knowledge in close connection with the contemporary art field, and institutions of valorization, addressing to the general public and often presenting package or co-produced exhibitions of recognized artists.

	Institutions of research *Scouting*	***Institutions of valorization*** *Well-established artists*
Low budget	Gatekeeping	Packages
Medium budget		
High budget	Artists recognized within the art field	Co-productions

The politics and the scheduling of temporary exhibitions range from an activity of research and gatekeeping to one of packaging blockbuster exhibitions. The budget and the mission of each museum define the mix of the offering system.
The investment on each single exhibition influences on the one side the production budget and the capability to attract artists, which makes the museum a central node in the art field; on the other, it conditions the dimension of the potential audience. From our survey, there is evidence that the dimension of a museum influences the choices: in fact, the higher is the budget, the less is the investment on emerging artists.
As observed for the collection strategy, the gatekeeping activity of a museum is often linked to the difficulty to produce or buy exhibitions with major artists. In any case, all museums recognize that gatekeeping is a crucial point for contemporary art institutions, so that also those with a more consolidated offer tend to have at least a “project room” for young artists or experimental proposals, more or less connected with the rest of the activities.

Architecture and urban regeneration
Another relevant asset is the design of the building. Two main roles can be identified: an internal role, if the building is mainly responding to the necessities of the institution (storage of collections and exhibits, display, production and so on); or a prevailingly external function, when the building is designed to be perceived as an icon and a fundamental part of the visiting experience. The analysis took also into consideration the relationship of the museum with the urban context, and its eventual role in a urban regeneration process.

	Functional	***Iconic value***
Isolated building	Focus on art	Iconic
Connection with urban policies	Focus on public sphere	Brand

There is a proliferation of museums designed with the explicit goal to influence the collective imagination. Guggenheim Bilbao is an example, but other museums as MACBA in Barcelona, or the Modern Tate in London, have invested in iconic buildings. Unfortunately there is not evidence of the direct impact of the design on the number of visitors; on the contrary, there is often a sacrifice of exhibition spaces in favor of the architecture.

The choice to invest in the building is not only part of a strategy to reinforce the offering system of the museum, but it is often driven by the necessity to regenerate urban areas. This is the case of MACBA, MAMbo and Tate Modern, which have been developed as part of projects of urban regeneration. Specifically, the different strategies depend on the source of revenue.
A first model is characterized by a large dependence on national contributions in order to manage the operative budget of the museum. This is the case of MuHKA in Antwerp, or IMMA in Dublin. This model shows a tiny structural link to urban policies, leaving the relationship with local stakeholders to the sensibility of the management. This typology of museum is built around a strong collection thanks to a large national endowment. The mission is explicitly linked to the cultural impact (education, conservation) that is expected from a national museum of contemporary arts. In the short term, the absence of a strong pressure for results in terms of audience allows more freedom in the curatorial practice. However, at the same time there is a large potential for increasing the museum attractiveness. In fact, there is a stronger attention on internal processes, instead of focusing on the relationship with the external stakeholders. Nevertheless, it is clear from the interviews that the welfare state crisis is demanding to reinforce the capability of these museums to raise resources through a better relationship with the market (visitor, partners, sponsors).
On the other side, there are museums based on contributions and endowments coming from local governments. For this second model, the research shows evidence of a stronger attempt to link the museum to the urban agenda. MAMbo and MACBA are a study-case: MACBA has been crucial in the Raval area regeneration process, while MAMbo is an important part of the renewal of Manifattura delle Arti, a former manufacturing area in decay. There is stronger emphasis on the design of the building, because of the necessity to spin the urban regeneration. Often the museum is strategically managed by local institutions, on urban or regional scale, to support a place-marketing strategy. But it is also a tool to generate consensus on the political agenda, which often drives the decision process to allocate resources for short-term results. Due to the structural scarcity of resources of local governments, this type of museum tends to have more difficulties to build a large collection and important temporary exhibitions. Therefore, there is a stronger relationship with the art system and in particular with collectors and local artists. The necessity to work with the neighborhood is also a strong driver to produce a consistent public program. Visitors, sponsorships, partnerships are usually an important source of revenue, than there is a strong marketing department and there is a focus on temporary exhibitions. The research shows also some evidences on the life-cycle of this type of museums: in fact, if there are traces of a consistent investment on the relationship with the neighborhood in the first phase, as soon as the neighborhood gets regenerated, the museum has to reshape part of its mission. In the second phase, the museum tends to invest on the capability to attract a larger audience.

Table 3 - Synthetic museums' positioning

	Collection	Artistic production	Architecture and urban regeneration
Guggen. Bilbao	High budget, global / consolidated artists	High budget, productions and co-productions, established artists	Iconic, central, city brand
Tate Modern	High budget, global / consolidated artists	High budget, productions and co-productions, established artists	Iconic, central, city brand
IMMA	Medium budget, both consolidated and local / new art	Medium budget, productions and co-productions, established and gatekeeping for local art	Historical building, decentralized, connected with urban policies
Fond. Beyeler	High budget, focus on modern art masterpieces and well-established	High budget, productions and co-productions, well-established artists	Functional, connected with public policies
MACBA	Medium budget, consolidated local and International artists	Medium budget, production of specific exhibitions (no packages)	Iconic, connected with urban re generation processes
Tate Liverpool	(Tate Collection)	Medium budget, productions and co-productions, established artists	Historical industrial building
Ludwig	Medium budget, focus on modern art masterpieces, established artists	Medium budget, established artists	Functional
MAC Lyon	Low budget, installations of contemporary artists	Low budget, productions, mix of young and established artists	Functional, decentralized (business area)
MAMbo	Low budget, partnerships for acquisition of young Italian art	Low budget, main focus on young and contemporary art	Historical industrial building, connected with urban context
MuHKA	Low budget	Low budget	Functional, decentralized

4.2. Museums' attractiveness and efficiency

In the second part of the study the main museum performances, in terms of visitors, have been confronted on the basis of the number of the potential audience in the surrounding areas. A rough measure of this potential has been calculated as the sum of two components:

1. the residents who live 50-80 square kilometers away, at most, from the institution, and who can reasonably travel and visit the museum in a single day;
2. the incoming tourism flows, in terms of arrivals, within the same geographical area[4].

Results emphasize a great heterogeneity and underline a weak correlation between the number of visitors and the museum performance in terms of attractiveness. Few leading institutions (Tate Modern in London and Guggenheim Bilbao) are able to reach an almost 20% of attractiveness (i.e. the number of visitors divided by the sum of the residents and the arrivals in the surrounding area) while all the others are shifting from the 0,5 to the 7%.

[4] In order to compare different countries, that use inhomogeneous regional divisions and criteria, we based on Eurostat's NUTS2 and NUTS3 areas. Centering on the museum's cities, we included in the analysis all the NUTS regions at a maximum distance of 50-80km from the center.

Moreover, the dimension of the potential market has only a relative influence on the overall number of visitors, while many other variables are at stake: the local context, the cultural policies, the institutions' communication strategies and so on.

Table 4 – Visitors and attractiveness of different European museums. Source: Elaboration on Eurostat and data offered by museums

Institution	**Visitors**		**Residents in 50-80 km area** (based on Eurostat)		**Arrivals in 50-80 km area** (based on Eurostat)		**Attractiveness** (Visitors / Residents + Arrivals)	
	2007	**2008**	**2007**	**2008**	**2007**	**2008**	**2007**	**2008**
Guggen. Bilbao	1,002,963	951,369	2,124,235	2,138,739	2,145,896	2,104,403	23.49%	22.42%
Tate Modern	5,236,702	4,647,881	13,348,253	13,459,626	15,484,770	-	18.16%	-
IMMA	485,000	450,000	1,696,300	1,724,519	5,765,000	5,765,000	6.50%	6.01%
Fond. Beyeler	389,385 [(a)]	298,725	2,668,011	2,688,232	3,379,010	3,433,286	6.44%	4.88%
MACBA	-	649,558	5257062	5,342,884	5,694,584	5,699,516	-	5.88%
Tate Liverpool	694,228	1,035,958	6,851,966	6,865,506	6,821,690	-	5.08%	-
MART	226,111	214,076	2,231,371	2,261,915	3,743,671	3,826,269	3.78%	3.52%
Triennale	472,026	497,273	7,273,990	7,344,591	6,185,182	6,216,660	3.51%	3.67%
Ludwig	320,000	354,000	6,431,165	6,433,509	6,781,274	6,829,639	2.42%	2.67%
MAC Lyon	178,000	200,000	4,170,832	4,199,500	4,160,885	4,166,118	2.14%	2.39%
Cast. di Rivoli	108,806	106,353	3,037,642	3,076,280	1,668,572	1,714,497	2.31%	2.22%
GAM	91,549	92,061	3,037,642	3,076,280	1,668,572	1,714,497	1.95%	1.92%
F. Sandretto	89,892	91,538	3,037,642	3,076,280	1,668,572	1,714,497	1.91%	1.91%
MAMbo	93,942	100,000 [(a)]	2,729,525	2,760,066	3,318,814	3,345,507	1.55%	1.64%
MuHKA	99,814	85,303	5,646,960	5,692,193	5,795,380	5,993,432	0.87%	0.73%
GAMeC	76,000	47,196	6,697,519	6,756,111	5,762,016	5,791,341	0.72%	0.38%

[(a)] *Approximation.*

In relation to the capability to attract visitors, we can observe four main stratifications. The first division is dimensional: it clearly separates the Guggenheim Bilbao and Tate Modern from the other national or local museums. These "global" institutions, with their iconic buildings, big exhibitions spaces and high budgets, are able to attract around 20% of their potential markets. The other three groups have a more limited attractiveness, from 1 to 6%. There is the possibility of suggesting a "scale effect" that influences the capability of single strong institutions to affirm their presence within the single urban spaces. Beyond this general, dimensional, variable, there is a more complex ensemble of reasons influencing the differences between institutions able to get from the 5 to the 6% of their potential markets (Beyeler, MACBA and IMMA) and those who are dimensionally similar but oriented to lower "shares" of visitors (like MAMbo, GAM and MuHKA).
First of all, even if contemporary art is increasing its appeal worldwide, its penetration into cultural consumption is linked to the cultural and educational policy of each nation. In Italy, for example, the absence of a national museum of contemporary art for decades (it opened in Rome in 2010) has clearly played against the demand. Guggenheim

Bilbao has been able to work as a magnet because of its spectacular iconic building and its collection, but the model is not replicable: each museum is rooted in a very specific socio-economic context, where contemporary art plays a certain role in the public sphere. Moreover, the offering system of a museum has a high level of variance, depending on the budget, the typology of building and the cultural mission cultivated by the curatorial team.

The following table shows the annual dimension of the operating costs. The cost per visitor spans from around 20 to 80 euros. There is no proportion between the cost per visitor and the museums' total budget: big institutions like Guggenheim Bilbao and Tate Modern spend on average 25 euros per visitor, similarly to the GAMeC gallery (1.8 million euros per year).

Table 5 – Operating costs, cost per visitor and cost per square meter of exhibition space

Institution	**Operating costs (million €)**		**Cost per visitor (€)**		**Exhibition space (sqm)**	**Total space (sqm)**	**Cost / Sq.mt exhib. space (€)**	
	2007	**2008**	**2007**	**2008**			**2007**	**2008**
Gugg. Bilbao	25.7	26.7	25.6	28.1	11,000	24,000	2,336	2,427
Tate [a]	119.2	109.8	22.8	23.6	29,000	57,000	4,102	3,779
IMMA	9.6	10.2	19.8	22.7	2,144	5,000	4,478	4,757
F. Beyeler	12.7	14.0	32.5	46.8	2,710	6,615	4,672	5,161
MACBA	-	13.1	-	20.2	5,634	18,197	-	2,325
MART [b]	12.0	-	53.1	-	6,530	13,283	1,838	-
Triennale [c]	13.9	-	29.4	-	8,875	13,000	1,566	-
Ludwig	-	-	-		5,340	8,000	-	-
MAC Lyon	3.0	3.3	16.9	16.5	2,800	3,800	1,071	1,179
C. di Rivoli	-	-	-	-	7,000	-	-	-
F. Sandretto	1.9	2.7	21.1	29.5	1,300	3,500	1,462	2,077
MAMbo	3.9		41.5	-	5,000	9,500	780	-
MuHKA	4.8	6.6	48.1	77.4	4,160	-	1,154	1,587
GAMeC	1.8	1.3	23.0	27.5	1,700	2,200	1,029	765

[a] *Consolidated balance for all Tate, including Tate Modern, Tate Liverpool, Tate Britain and Tate St. Ives.*
[b] *Rovereto and Trento.*
[c] *Consolidated balance (Fondazione Triennale and Triennale Servizi).*

5. Conclusions

The research has been an opportunity to investigate contemporary art museums with a multidimensional approach and has identified significantly different models. The offering system of contemporary art museums suggests a consistent difference between museum funded by local governments and national governments.
A first segmentation is dimensional:

- **global institutions** (Guggenheim Bilbao and Tate Modern) have iconic buildings, situated in crucial urban spaces, and can attract more than 1 million visitors per year, roughly the 20% of their total potential audience. Their operating costs are at least two times those of other big museums and they amount to 20 million euros. They have remarkable historical collections and exhibition spaces bigger than 20,000 square meters.
- **the other museums** have a more limited capability to attract visitors - from 1% to 6%. In this group we can recognize very strong differences in terms of mission, governance, collection, cultural activities.

A second segmentation, therefore, is useful to qualify the strategy and positioning of these "non global" institutions:

- a first model of museum shows a **strong dependence on public contributions** (national or regional, as for IMMA, MACBA, MART)[5]. They are built around big collections, with resources and assets above the average. Along with their conservation and historicization task, they aim to have strong cultural and educational effects. They tend to have a good economic efficiency (around 20 euros per visitor), with some exceptions. The MuHKA, for example, is supported by the Flemish Community and is.expressly conceived as a pure research institution;
- a second group of museums **depends more on local contributions**, public and sometimes private (MAMbo, MAC Lyon). They have more structural and long term connections with urban policies, so they can be more conditioned by the local political dynamics. The curatorial activity is limited by less abundant resources and the collections are more restricted or focused. These museums are more linked to the local art community and systems; they tend to extend their public program activities (events, conferences, performances) with fundraising initiatives.

In general, local museums tend to have a stronger link to urban policies and the necessity to develop projects for a larger audience in the short term. On the contrary, national museums have the opportunity to develop long term projects, but they have weaker relationships with the urban agenda. Although there is common tendency to develop offering systems that reach a larger amount of visitors because of the increasing scarcity of public and private funds. Then, there is the risk to produce a homogeneous offer, with a low attitude to do research on emerging art trends.
Museums are also changing their role in the urban space, developing a central role for cultural consumption and entertainment, which is far beyond exhibiting contemporary art. There is an increasing offer of public programs, together with services as cafés, restaurants, shops, with the goal to increase the frequency of visitors and to increase the revenues. It could be interesting to understand how these features will impact on the nature of contemporary art museums and how relevant they will be in influencing the offering system.
The research stresses the difficulty to develop a research project able to investigate both the management and cultural issues of museums. In particular, it is difficult to compare the findings in two areas of analysis. There is the necessity to identify a system of

[5] The Beyeler Foundation is mainly private-funded.

measurement able to combine the cultural variables with the quantitative findings of the management. Moreover, the blurring borders of the contemporary art field restrict the opportunity to define fix parameters to investigate the culture nature of programs and activities of museums.

Table 6 – Different models of institutions

<table>
<tr><td rowspan="4">Dimension</td><td></td><td colspan="2">Strategic orientation</td></tr>
<tr><td>Global institutions</td><td colspan="2">- Attractiveness > 20%
- Budget > 20,000,000 €, from national governments or big international institutions
- Exhibition spaces > 20,000sqm

ART SYSTEM
- Significant role in the international art system
- Modern-contemporary collection

CIVIC COMMUNITIES
- Iconic building
- Strong impact on territorial marketing

MARKET
- Visitors > 1,000,000
- Global relevance of the brand</td></tr>
<tr><td rowspan="2">Non-global institutions</td><td>National museums</td><td>Local museums</td></tr>
<tr><td>- Attractiveness 1%-6%
- Strong dependence on public contributions
- Resources and assets above the average

ART SYSTEM
- Big collection
- Conservation and historicization task
- Relevant cultural and educational impact at national level
- Research-oriented curatorial activity

CIVIC COMMUNITIES
- Average impact on territorial marketing
- Weak interaction with urban agenda

MARKET
- Limited pressure for visitors: 200-600,000
- Propensity to economic efficiency: cost / visitor around 20€)</td><td>- Attractiveness < 2%
- More limited resources
- Strong dependence on local contributions (public, sometimes private)
- Stronger fundraising activities

ART SYSTEM
- Close relationship with local art system (artists, collectors, galleries)
- Wide public program (events, performances, workshops, conferences)

CIVIC COMMUNITIES
- More structural and long-run connections with urban policies
- More frequent iconic buildings

MARKET
- Visitors < 100,000
- Less efficiency: cost per visitor around 30-50€</td></tr>
</table>

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Appendix – Synthetic information on museums

Museum	**Open-ing**	**Structure**	**No. of exhibit.** (2007)	**Collection**	**Main focus**	**Building**	**Admission** (2007)
Gugg. Bilbao	1997	Foundation (Basque Government, Provincial Council of Bizkaia and S. R. Guggenheim Foundation)	8	Guggenheim shared collection, 7,000 works of art. Focus on contemporary and on European / Spanish art	Modern and contemporary	Iconic building by Frank O. Gehry	Variable, 8-13 €
Tate Modern	2000	Non-Departmental Public Body (NDPB) - Department for Culture, Media and Sport	14	Tate shared collection, 66,000 works from Fauvism on	Modern and contemporary	Former Bankside power station	Collection free, exhibitions variable (0-9.80 £)
IMMA	1991	Company limited by guarantee without share capital - Funded by Department of Arts, Sport and Tourism	19	4,500 pieces of Irish and international art, focus on contemporary	Modern and contemporary	Historical building, Royal Hospital Kilmainham	Free
Fond. Beyeler	1997	Private foundation	3	200 masterpieces of modern art	Modern	New functional building by Renzo Piano	23 CHF
MACBA	1995	Foundation	8	5.800 pieces from the '50s, focus on Catalan art	Contemporary	New building by Richard Meier. The museum is located in a neighborhood, Raval, which has been part of a consistent process of urban regeneration during the 90s	All 7.50 €, collection 3 €, one xhib. 4 €
Tate Liverpool	1988	Non-Departmental Public Body (NDPB) - Department for Culture, Media and Sport	5	(Tate collection)	Modern and contemporary	Former Albert Dock warehouse	Collection free, exhibitions variable (0-8 £)
MART	1987	Public, within Provincia di Trento	17	15,000 works, focus on Italian '900 and Futurism	Modern and contemporary	New iconic building by Mario Botta	10 €. Cumulative ticket
Triennale	1923	Foundation	39	No art collection, design museum	Contemporary	Historical building	Variable, 0 - 8 €
Ludwig	1976	Public	13	More than 1,600 pieces, focus on Expressionism and Russian avantgardes	Modern and contemporary	Functional building	9 €. Reductions once a month for residents
MAC Lyon	1984 - 1995	Public (City of Lyon)	6	1,100 works of international artists from '60s on. Biggest European collection of installations	Contemporary	From 1995, located in new building by Renzo Piano	6 €, cumulative tickets

C. di Rivoli	1984	Association	5	More than 300 works of art and 700 videos	Contemporary	Historical industrial building	6.50 €
GAM (TO)	1993 (re-open)	Foundation	8	15,000 works from 1700 on	Modern and contemporary	Functional building of 1959	7.50 €
F.Sandretto	1995	Private foundation	7	1,000 works of Italian and international contemporary art (commodate)	Contemporary	New, functional building	5 €
MAMbo	2007	Public institution (City of Bologna)	7	More than 3,500 pieces from XIX century. Focus on Morandi and Italian art from '50s.	Contemporary	Historical industrial building, former bread oven	Collection free, exhibitions 6 €
MuHKA	1987	Public (Flemish Community)	17	700 works from the ‘70s, local and international artists.	Contemporary	Former grain silo	6 €
GAMeC	1991	Association	12	More than 300 works of art.	Contemporary	Historical building	7 €