

Globalization of Japanese Art Galleries

An analysis of Tokyo's contemporary art galleries' art fair participation and artist nationalities

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1. Introduction

Since the end of the 1980s and early 1990s, the contemporary art world has been undergoing changes often referred to as 'globalization'. Non-Western artists began acquiring a new level of recognition in the art world, a world that had formerly mostly been recognizing Western ideas and standards. Over the years, the Euro-American framework centered on auction houses, art fairs and galleries has been emerging in other parts of the world.¹ New art centers are appearing, and internationally oriented local art markets are developing. Still, the 'global' nature of the art world stays subject to discussion, centering on the question of how global the contemporary art world has truly become.

A noteworthy, but understudied case for the discussion on globalization of art worlds and markets is Japan. During the country's so-called 'economic miracle' after World War II, Japan experienced enormous economic growth. The end of this period, in which the stocks reached their heights before declining sharply, was between 1986 and 1991, and is often referred to as the 'bubble period'. Avant-garde art practices had been present in Japan since the 1950s and 1960s, but it was during these bubble years that a commercial art market started developing. Many modern European masterpieces were sold to Japanese collectors, and several Japanese artists became internationally renowned. Artists such as Takashi Murakami and Yoshitomo Nara gained great recognition on the international art market, with artworks which seemed to reflect the 2002 concept of 'Cool Japan' and fit into Western neo-Japan ideas.² However, current auction records show that Japanese artworks are auctioned for relatively low prices, and relatively few new Japanese names have appeared in international exhibitions and at art fairs since the booming 1980s.³ Furthermore, yearly rankings of the most influential art professionals by *Kunstkompass* and *Artfacts* show that Japan's share is very small.⁴ While we can see new names from countries like China climbing to the top rapidly, Japan stays behind. The country does not only seem to have largely disappeared from the international art

1 Velthuis 2013, p. 290.

2 McGray 2002, p. 3.

3 Okanda 2016, Favell 2015, p. 238.

4 Quemin 2015, p. 837. Although the USA and a small number of Western European countries dominate these lists, Japan only takes up 1.3%.

market; its art market and artists remain understudied in art market literature.⁵

A term often referred to when discussing the Japanese contemporary art market in general is the 'Galapagosization' of Japan – because the country developed its market and technology at a fast pace in a relatively closed system, it now finds itself in an isolated position. This reference to the islands on which Darwin based his famous evolution theory implies that the country's market and technology were developed at a fast pace in a relatively closed system, which has led to an isolated market position. The prime example of this phenomenon has become the mobile phone market, on which Japanese companies made rapid developments and became frontrunners on the technology level. Yet, they failed to rise to the top on a global level due to the too-advanced technology, an isolated market and differences in business strategies. Adrian Favell, who has provided the most extensive study of the Japanese contemporary art world so far, has linked the concept of Galapagosization to Japan's position in the global art world. Favell argues that the way Japan's art system developed caused their contemporary art market to have fallen behind since the bursting of the 'economic bubble' in the 1990s.⁶ Yuka Okanda has shown that only a few galleries have participated in Art Basel in the last few years, indicating a weak position on the international art market. Both Favell and Okanda have argued that Japan's art world possesses weak structure concerning its crucial actors: museums, art galleries, private collectors and curators.⁷

Several authors have defined art galleries as the art markets gatekeepers, occupying an important position as link between artist and audience, collector and museum. Furthermore, they play a crucial role in discovering new artists and the valorization of contemporary art.⁸ However, little academic attention is paid to the workings of galleries. Furthermore, little attention has been paid to the way Japanese galleries engage internationally, as possible indicators for the country's international performance. Inspired by studies by Velthuis and Quemin, this thesis identifies two factors to

5 Apart from the studies that will be elaborated on in the literature review, most research on Japanese artists centers on an established few: Yayoi Kusama, Yoshitomo Nara, Yoko Ono, and Takashi Murakami.

6 Favell 2011.

7 Favell 2011, Okanda 2016.

8 Bystryn 1978, Moulin 1987, Velthuis 2013, Okanda 2016.

measure a gallery's globalization.⁹ The first factor is the 'home bias' in the representation of artists, which is the degree in which a gallery represents artists from the country it is based in, as defined by Velthuis.¹⁰ The presence of a strong home bias indicates a lesser degree of globalization. The second factor by which the gallery's globalization will be analyzed is the location of art fairs in which it participates. Various studies have pointed out the importance of art fairs for reaching an international art public.¹¹

Based on this, I have defined the following research question: *How global are Tokyo's contemporary art galleries, based on the home bias in the artists they represent, and the international art fairs they partake in, and what does this mean for Japan's position in the international art world?*

Hypothesis

Based on the earlier research, this thesis hypothesizes that Tokyo's contemporary art galleries show a low degree of globalization, based on both the nationalities of the artists they represent, and the countries the art fairs they partake in are based in.

Aims

In a broader sense, research on the way these galleries function can broaden the understanding of the operation of art markets, and how differences in gallery strategies might contribute to the degree in which a country's art market partakes in the so-called 'globalization' of contemporary art.

On a broader scale, this thesis will aim to contribute to debates on globalization of the art world.

Literature has pointed out the importance of art galleries for the contemporary art market, and therefore this analysis of Japanese art galleries will fill an important gap in understanding Japan's art market on an international scale.¹² In my thesis, I will focus on Tokyo's contemporary art galleries, to fill this gap in literature on Japan's position on the contemporary art market.

Thesis structure

⁹ Velthuis 2012, Quemini 2013.

¹⁰ Velthuis 2013.

¹¹ Quemini 2013, Velthuis 2012, Yogev and Ertug 2015, Velthuis and Baia Curioni 2015, Baia Curioni, Forti and Leone 2015, and Vermeylen 2015 have argued for the importance of art fairs for thriving international art markets. Quemini has analyzed international art fairs extensively, arguing they indicate the degree of globalization of a country.

¹² Bystryn 1978, Velthuis 2013.

First, a literature review will provide an overview of recent literature on globalization in general, globalization in the context of contemporary art markets, art galleries and art fairs, and the specific case of Japan's art market. Then, the methods section will provide for more details about the data collection and research methods used. The following chapter will provide for context on the developments of the Japanese contemporary art market, and the current condition. The next chapter will analyze in which art fairs Japanese galleries partake, and which countries are among the most popular among Japanese galleries. The final chapter focuses on the nationalities of artists that are represented by these Japanese galleries. Both the chapter on art fairs and the chapter on artist nationalities will have a separate section devoted to galleries participating in Art Basel, to see if results differ when just analyzing these 'established' galleries. By method of quantitative data analysis largely based on art gallery websites, it will be concluded how globalized Tokyo's galleries for contemporary art are, based on the abovementioned factors. On a larger scale, conclusions will be drawn regarding the bigger picture of globalization of art markets.

2. Literature review

Globalization of the art world

The concept of globalization has been discussed extensively, centering on the meaning and validity of the concept itself. Globalization in the context of the art world mostly refers to the global flows of artistic products and ideas, and the new possibilities for exchange that follow.¹³ It is worth analyzing the various ways in which this concept has been approached, in general and in relation to the art market.

Appadurai (1996) proposed his theory of five '-scapes'; 'worlds' of constantly changing global flows of information, ideas, culture, goods and people. These overlapping '-scapes' construct the world people live in, and create the way they perceive the world and their own position in it. In 1999, Appadurai added 'artscapes', signifying the global flows of artworks, cultural ideas, products and styles.¹⁴ Although Appadurai mentions practicing the use of these artscapes when dealing with postcolonial discourse and cultural traditions in a globalizing world, he does not give enough

13 Herrero 2013, p. 159.

14 Appadurai 1996. The original proposed 'scapes' are ethnoscape, technoscape, finanscape, mediascape and ideoscape.

attention to the power relations at play in these flows of art.¹⁵ Bourdieu (1996) has argued that globalization is a pseudo-concept and consists of imposed power discourses, since globalization is based on a framework of institutions and ideas from the dominant countries.¹⁶ According to Bourdieu and Wacquant (1999), globalization only exists on the geographical level, and the vague notion of 'globalization' makes the unequal power relationships seem 'as a neutral necessity', by keeping effects of imperialism out of view.¹⁷ Relatedly, Belting (2009) states that globalization should not be confused with modernization, clearly separating the two in his research on global art and global art history. According to Belting, the globalization of the art world can be compared to the internet: both are accessible globally, but that does not mean they are used in the same way everywhere.¹⁸ Modernization posed Western norms and rules as 'universal', but has nonetheless played a large role in the export of Western art to the rest of the world, and the response of the "modernizing" countries. A global access to the 'art world' does not necessarily mean globalization on equal terms.

Hannerz's (1989) analysis of asymmetrical relationships in the cultural field distinguishes centers and peripheries in political, cultural and global terms. His analysis of transnational cultural flows, as he calls them, points out two possible scenarios: the saturation scenario, in which local culture will assimilate and become increasingly similar to the 'imported' culture, or the maturation scenario, in which a local culture will take apart imported cultural items and use them in a local manner.¹⁹ Hannerz argues that the peripheric countries are in a vulnerable position and dependent on the center, creating an unequal power struggle.²⁰ In 1997 Robertson coined a term similar to Hannerz's maturation scenario: 'glocalization', derived from the Japanese media term for 'indigenization' (国産化, *dochakuka*), sporadically used in economics. Glocalization implies a situation in which 'globalized' products and services are tailored to local needs.²¹ This is a slightly more optimistic and equal view of globalization, and does not just focus on Western countries as the center versus 'the others' as

15 A similar comment has been made by Buchholz and Wuggenig 2005.

16 Bourdieu 1995, p. 34, cited by Buchholz and Wuggenig 2005.

17 Bourdieu and Wacquant 1999, p. 42.

18 Belting 2009, pp. 39-40. In his definition, Belting does account for societies in which, like the internet, access to art is restricted.

19 Hannerz 1989, pp. 73-74.

20 Hannerz 1989, p. 74.

periphery.

The Contemporary Art Market

Globalization research on the contemporary art field has focused mostly on the inclusion and exclusion of countries; the center and the periphery. It appears that the 'art world' has become more inclusive of non-Western art and art institutions: international art fairs are opening around the world, and more artists with non-Western nationalities appear in international exhibitions. Still, it remains unclear what this relative inclusion actually entails. Kravagna (2004) has argued that the recent trend of more Asian and African artists being visible in the art world has little to do with a real globalization and post-colonial discourse – instead, he finds the cause of these developments in an 'ethno boom' – a renewed Western interest in 'oriental' and 'ethnic' qualities.²² His discourse analysis of the popular reception of Japanese photographer Nobuyoshi Araki in the West reveals a focus on the exotic and erotic nature and special interest in symbolic 'oriental' interpretations of the photographs.²³

Becker (1974) has defined art as a collective action, which is given meaning by networks of people working together and attaching value to it. Various 'art worlds' containing their own meanings and symbols exist, but some are more dominant and more commonly accepted than others. Where Becker stresses the collaborative nature of art, Bourdieu emphasizes the field as one of struggle and competition for power. Bourdieu's extensive research on the field of cultural production (1983) through his model of 'capital' defines art not only as a material object, but also as a symbolic object which only exists if it is known and recognized by the participants of the field²⁴. These participants establish the meaning of the "cultural capital", which is needed for navigating the art field and becoming part of it. People possessing the right *habitus*, the skills and intellect influenced by factors such as personal environment and social class, have higher chances of obtaining this cultural capital and partaking in the field. Velthuis (2005) also argues that cultural, aesthetic and economic values are socially constructed. It depends on the opinion of cultural institutions and important art world professionals, like galleries, museums, and critics. Institutional recognition comes first, and then

21 Robertson 2005.

22 Kravagna 2004, cited in Buchholz and Wuggenig 2005

23 Kravagna 2008.

24 Bourdieu distinguishes three forms of capital: economic capital (economic resources), social capital ('network' resources) and cultural capital (education, cultural property and language use).

influences the opinion of the audience.²⁵

Therefore, to fully understand art worlds, the study of art itself should also be accompanied by studies on the critics, the gallerists, the museums and academies which help valorize the work of art.²⁶ These “gatekeepers” collectively create and uphold the norms for inclusion and exclusion in the contemporary art world.²⁷ This “dealer-critic system”²⁸ in which a mutual dependency exists on the primary art market between the art market and the critics, developed in the 19th century in France with the Impressionists, and is often referred to when discussing the development of art markets. This system stresses the current importance of art galleries for the international art market.

Art Markets and Galleries

Several authors have researched the role of art institutions such as museums and auction houses, but thorough research on the primary art market, which includes contemporary art galleries, has been recent and is still limited to a few authors. Art markets have been studied sociologically after Moulin (1987), who researched the multiple markets for contemporary painting. Through personal interviews with Paris’ gallerists, artists, and art dealers, she provides insight into the workings and personal views of art world professionals. Her research confirms that various factors are important for the establishment of artistic and commercial value of artworks. Moulin confirms that apart from the artists that are represented, the general reputation of a gallery is also of great importance for its success on the market.²⁹ Still, it seems difficult for gallerists and artists outside the ‘core’ of the art world to obtain an established reputation. Quemins (2015) analysis of the yearly *Kunstkompass* and *Artfacts* rankings also points out that these lists of most ‘influential’ artists in the world still largely consist of artists from a small ‘art world core’ in Western Europe and the United States. He concludes that although certain artworks from non-Western artists are currently being sold for rising prices on the auction market, the actual field has not opened up.³⁰ Furthermore, Quemin has pointed out that

25 Velthuis 2005, pp. 160-161.

26 Bourdieu 1983, pp. 318-319.

27 See for example Harris 2013.

28 Term coined by White and White (1965) p. 94.

29 Moulin 1987.

30 Quemin, 2015, p. 826, pp. 844-849.

in terms of art fairs, 'international' is often used as a way of saying 'global', although in reality his data point out these fairs are rarely truly globalized. In the most prestigious international art fairs, all located in either Western Europe or the United States, participation is still limited to galleries from certain art centers: the USA, Germany and the UK make up the largest percentages of galleries present. The only non-Western countries making up for more than 2% of the participating galleries are China (5.5%) and Japan (4%).³¹ Concerning the nationalities of the most frequently presented artists at art fairs a similar trend is visible: with 42% from the United States, 15% from Germany, 11% from Italy and another 11% from England. Just 5% of the most frequently presented artists at art fairs are Japanese.³² These data show that a large part of the primary art market is still centered on Western nationalities and countries.

Regarding the representation of artists by contemporary art galleries, a home bias has been pointed out by Velthuis (2013), in his study on Berlin and Amsterdam galleries. Velthuis provides various models for the interpretation of the home bias. The 'cultural affinities' model suggests that local products are generally preferred by an audience, because they can identify with the similar values and styles that are expressed.³³ A different model proposed is the 'core-periphery' model, which suggests that there is a 'core' and 'periphery' of the art world. According to this model, globalization is similar to westernization, and the power relations present in the art world reflect power relations on the economic and political level. Countries that belong to the economic and political 'core', are therefore more influential and visible on the international art market, than 'peripheric' countries.³⁴ A third model proposed by Velthuis is based on practicalities such as personal contact and support, possibilities for face to face meetings and helping hands during the installation of gallery exhibitions and artwork handling.³⁵ This home bias causes obstacles for a true globalization in which artists are able to move between global networks and partake in the established art galleries and fairs. Velthuis argues that globalization leads to a larger emphasis on local networks when it comes to the art

31 Quemini 2008, p. 82.

32 Quemini 2008, p. 87

33 Velthuis 2013, p. 295.

34 Velthuis 2013, p. 296.

35 Velthuis 2013, pp. 298-303.

market.³⁶ This is supported by Hannerz (1989), who claims that peripheric countries have possibilities for growing if they are able to sustain a strong national market.³⁷

Japan's Art Market

Therefore, when analyzing the position of Japan in the international art market, it is important to look at both Japan's position abroad, and at the national Japanese market. We have to look at the opportunities that there are to develop favorable art world and market conditions.

Adrian Favell has so far provided the only extensive review of the Japanese art market. *Before and After Superflat* provides an overview of the developments of the Tokyo art world during and after the Bubble Period. Based on interviews and personal accounts of Tokyo's art world professionals, he analyzes the development of Japan's art world, and case studies of its most famous products: Yoshitomo Nara and Takashi Murakami. Interviews with gallery directors provide more information on their workings and aims.³⁸ In his article *The Contemporary Art Market in Galapagos: Japan and the Global Art World* Favell analyzes the role of curators, art gallerists, art press and collectors. As mentioned earlier, in this article Favell connected the international art market to the concept of 'Galapagosization', He describes Japan as "a disconnected land in which weird and wonderful creatures thrived, but were driven to extinction when they came into contact with the outside world".³⁹ He concludes that Japan's market was not open for foreign curators, and was structured too much on the institutional structures in place. Therefore, international curators could not get a foothold in the Japanese art market, and the demand for Japanese art developed only in very specific directions, connected to neo-pop.⁴⁰ Furthermore, Favell has argued that there has been a shift towards Asian markets, and Japanese people were reluctant to work together and network like they should have to get access to the elite art world circles.⁴¹

36 Velthuis 2013, p. 304

37 Hannerz 1989, p. 74.

38 Favell 2011.

39 Favell 2015, p. 238.

40 Favell 2015, p. 260.

41 Favell 2015, pp. 250-251.

Although Favell's research does research the development of Tokyo's art galleries and primary art market, his research only lightly touches on the activities of Tokyo's galleries. Favell mentions the developments of Japanese art galleries, and in this context he only lightly touches on their current state and the strategies they employ on the market. Other existing literature does not seem to address the role of galleries for Japanese art on the contemporary art market either, and quantitative studies such as Velthuis's on Amsterdam and Berlin galleries have not yet been conducted for Japan. This thesis aims to fill the gap in research on the Japanese contemporary art market, by studying Japan's galleries more closely.

3. Methodology

This thesis largely relies on the method of quantitative data analysis. The first chapter serves as a framework and is based on secondary sources and secondary source interviews with gallerists and other art professionals. The main part of the thesis uses the method of quantitative data analysis to evaluate data on Tokyo galleries for contemporary art. Data on the nationalities of artists and on the locations of the art fairs these galleries participate in were collected from a combination of primary sources: gallery websites, ArtFacts.net, ArtNet and art fair websites. Through analysis of these data, this thesis determines whether Japanese galleries are global in their artist representation and participation in art fairs.

Obtaining the Main Gallery Sample

The main sample of Tokyo art galleries was used for both research of artist nationalities and art fair participation. To begin with, the sample of galleries was acquired through ArtFacts.net, an online art database which collects data from individual artists, art fairs, galleries and museums. Although not all information on ArtFacts is up to date, their list of galleries is currently the most comprehensive and inclusive one publicly available. Data collection from ArtFacts has been employed by other art market researchers like Quemin and Velthuis.⁴² A deliberate choice was made to focus only on galleries in Japan's capital Tokyo, since this city knows the highest concentration of contemporary art initiatives and could be regarded as the contemporary art capital of the country. Furthermore, by limiting the research to one city, confusion about different national gallery networks can be avoided.

Only contemporary art galleries were included. Although 'contemporary art' is difficult to define

42 Quemin 2015, Velthuis 2013.

precisely, this thesis regards it according to popular opinion as art from the early 1970s up until today. Since this research does not focus on the styles the artists work in, 'contemporary art' is not defined in aesthetic terms.⁴³

According to ArtFacts.net, Tokyo currently knows 492 art institutions, including art fairs, journals, auction houses, publishing houses, non-profit organizations, private collections, museums, project spaces, biennials and triennials. Of these, 393 are marked as private galleries. Artfacts marked twenty-two as closed, leaving a total of 370 galleries.⁴⁴ Through analysis of the websites of these 370 galleries, they were either in- or excluded from the list based on several qualities. First, fifteen had recently closed without being registered as such by ArtFacts, leaving 355. Thirty-nine galleries were excluded instantly for not having a website, since this research is largely based on website data and a lack thereof makes such research impossible.⁴⁵ Galleries' official websites are generally used to inform visitors of exhibitions, fair participation and artist activities. Lack of an official website indicates that a gallery is not participating actively on the art market – it possible that the gallery relies more on a local customer base and on word-of-mouth advertising. Another possibility is that the gallery is currently not in business anymore. No further notice was paid to the reason for the lack of a website. Furthermore, 164 galleries were removed from the list for various reasons. These include galleries that do not represent artists (the so-called *kasha garo* galleries), galleries for antiques and traditional crafts, project spaces, and secondary dealers by which works by famous artists are bought and re-sold. Secondary dealers that also represent artists and engage in the primary market as well, have remained included. Twenty others were excluded for various other reasons, such as the gallery being a separate project space belonging to another gallery already included in the list, or having a home base located in a different city.⁴⁶ In total this leaves 132 galleries currently in business in Tokyo. Of this total amount, 26 were excluded for having a website only navigable in Japanese. After selection, 106 art galleries in Tokyo fit the profile for analysis. As a random sample, every second name on the

43 Smith 2002, p. 7.

44 Artfacts.

45 In some cases, these galleries did have a Facebook page, but no active ones.

46 This includes the well known gallery Blum & Poe Tokyo, which is originally based in Los Angeles instead of Japan. Although this gallery has played an important role in the development of the Japanese contemporary art scene, it has developed itself in Los Angeles before opening a gallery in Tokyo. Murakami's Kaikai Kiki is also excluded; although it has several characteristics of an art gallery, it promotes itself as an 'art production company'.

alphabetical list was selected, leaving the final sample of 53 galleries. This sample was used for both the chapter on artist nationalities and participation in art fairs.

Defining 'Established'

Velthuis, Quemin and Okanda have limited their data analysis to only the established galleries. As suggested by Velthuis (2013), such established galleries have the most resources to maintain 'global' networks.⁴⁷ However, this thesis aims to provide for a broader overview of Tokyo galleries in general. Therefore, the data sample was deliberately taken from all contemporary arts galleries. Not limiting the selection to the established galleries representing 'high arts', the results will provide for a more inclusive overview of the state of Tokyo's art market, instead of just the internationally-oriented galleries.

For comparison with the small group of established galleries, a second data set was created based on established galleries. For defining the reputation of the "established" galleries, a similar method to Velthuis's was used. Velthuis defined them as established if they participated at least once in Art Basel or Art Basel Miami Beach between 2000 and 2008.⁴⁸ Both Velthuis and Quemin have employed similar methods for selection, and have argued that Art Basel and Art Basel Miami are among the most established art fairs internationally.⁴⁹ Similar to these authors, I have not defined Art Basel's Hong Kong branch as established, as it has not yet reached the level of significance of the other two branches. Considering the facts that the Hong Kong branch has just been opened recently, this is unsurprising. However, it also shows that the most prestigious and internationally important art fairs are still located in the West.

A list of Japanese participating galleries was compiled based on the official Art Basel website, and checked with ArtFacts.net, Artsy.net and the galleries' personal websites to eliminate possible errors. This concerned the period between 2014 and 2016 to determine the reputation of these galleries. Okanda has conducted this Art Basel research as part of a different study as well, based only on 2013 and 2014.

Data analysis

Chapter two analyzes the art fairs in which Tokyo's art galleries participate, and uses the sample of 53 galleries. For each gallery, a list was compiled containing the names and locations of the art fairs

⁴⁷ Velthuis 2013, p. 303.

⁴⁸ Velthuis, 2013, p. 293.

⁴⁹ Velthuis 2013, Quemin 2008, Quemin 2013.

these galleries participated in between 2014 and 2017.⁵⁰ The results were divided in three categories: Japanese, Asian (other) and non-Asian. This division makes it possible to see whether the Japanese galleries are focusing on a national market, regional markets or aiming globally. For comparison with the established galleries, lists were compiled for the period from 1990 until 2013 as well, based on ArtBasel's official website and ArtFacts. 1990 was chosen as a starting point, since this was the first year a Japanese gallery started participating in Art Basel. For comparison, a small list for the years of Japanese participation in Art Basel Hong Kong was compiled. Art Basel Hong Kong opened its doors in 2013, so this concerned the period between 2013 and 2017.

In chapter two, the nationalities of the artists represented by the sample galleries were analyzed. Based on information on the galleries' personal websites, lists were compiled of the amount of artists per gallery, and their nationalities. In the few cases in which a gallery website did not provide a nationality, this information was obtained from the artist's personal website, or websites of other galleries that represented the artist. The same division of Japanese, Asian (other) and non-Asian was applied.

To compare the artist nationalities with the ones represented by established galleries, the list compiled of Art Basel participants between 2014 and 2016 was used. Based on the galleries' websites, I compiled lists of the artists that these galleries represent and their respective nationalities.

Limitations

Due to the limitations in understanding of the Japanese language, further research would benefit from the inclusion non-translated Japanese sources. Furthermore, an analysis of the Japanese-only gallery websites that are now excluded from the sample could provide information on the way these galleries operate in the context of globalization.

The quantitative data were collected from websites, and therefore possibly contain mistakes or outdated information. To eliminate these as much as possible, the results were checked against the other websites mentioned earlier.

⁵⁰ Ultimately, the data for 2017 were left out, since there would be too much confusion with the art fairs taking place in different periods.

4. The Japanese art market

The 1990s gave rise to many changes in the art world, including increasing possibilities for communication across the globe. The art market, which had been developed in and mostly confined to the United States and Western Europe, started including other countries, and similar market systems started developing across the globe. However, this does not mean that countries outside the Western framework did not possess their own forms of art production or markets. In the case of Japan's art market, the late 1980s and early 1990s are generally regarded as the most important years internationally, when the country played an important role in the world economy and the art market. To understand the current state of Japan's market for contemporary art, it is necessary to clarify the ways in which the market for contemporary art developed in Japan. This chapter will provide an outline of the development of the art world and art market in Japan, focusing on Japan's so-called "Bubble period" of the late 1980s and early 1990s. Furthermore, the years after this period will be summarized, and related to the development of a market for contemporary art in Japan and its current state. This chapter will provide a framework for the following chapters and for the results from data analysis on the Japanese art galleries.

The Development of a Commercial Contemporary Art Market

The 1950s and 1960s had already known strong avant-garde art movements in Japan, including Mono-Ha and the Gutai group. However, as suggested by Favell, the commercial contemporary art market did not start developing until the 1980's.⁵¹ During Japan's so-called 'bubble economy', which hit its heights at the end of the 1980's, Japanese corporations started entering the international art market as private collectors. In the period from 1987 to 1990, these new collectors paid famously large sums for modern masterworks from artists like Picasso, Rodin and Van Gogh. One of the most internationally well known collectors during this period was Ryōei Saitō, the head of the Daishowa paper manufacturing company. In 1990, at Christie's New York, Saitō bought Van Gogh's "Portrait of Dr. Gachet" for 82.5 million dollars, setting the record for the highest price ever paid for a painting at an auction. Two days later he set the record for the second-highest when he bought Renoir's "Bal du Moulin de la Galette" for 78.1 million dollars at Sotheby's New York.⁵² The fact that the original estimate for the Van Gogh by Sotheby's had been between 40 and 50 million dollars, is one example that shows the amounts these new collectors were willing to pay – and with this, they increased the

51 Favell 2015, p. 244.

52 Weisman 1990.

monetary value of these artworks with astonishing amounts. Before 1984, the total sum of imported artworks had amounted to approximately 40 billion yen.⁵³ By 1990, this amount had risen to 614.7 billion yen.⁵⁴ It did not take long before Christie's and Sotheby's started opening branches in Tokyo as well: Sotheby's first auction in Tokyo was held in 1989, and offered Western prints from well known artists such as Picasso and Chagall to the new Japanese collectors.⁵⁵ While the sales to Japanese collectors on the secondary market were skyrocketing, Japan's national art market was developing at a different pace.

The commercial Japanese contemporary art market did not start developing until the late 1980s. Art dealers were mostly concerned with traditional arts and antiques, and were generally family-owned businesses based on apprenticeships. A different well-known type of gallery in Japan is the *kashi garō*, which started opening its doors in the 1960s. These commercial 'rental galleries' were mostly based in Tokyo's Ginza area, known as the city's area for luxury goods and high-end shopping. This type of gallery did not represent its own artists; artists could book a space for an exhibition themselves.⁵⁶ Although these galleries could provide artists with exposure and sales opportunities, they did not engage in long-term professional relationships with them. While Western-style galleries generally provide their artists with network opportunities, curatorial help and professional advice, these galleries left the organization and sales to the artists themselves.

While many *kashi garō* still exist today, these galleries are less compatible with the development of a commercial art market, which depends on the collaboration between auction houses, galleries and museums with curators, artists and critics. Furthermore, they do not invest in the development of artists through funding, networking or support, which does not provide them with many opportunities needed to become successful internationally. As mentioned earlier, supportive galleries and art networks are important for the professional development of artists. As artist Yayoi Kusama explained: "More than just showing and selling the work, a gallery puts an artist on the map, makes her relevant, gives her a reason to be".⁵⁷

53 Ueno 1999, p. 4.

54 Ueno 1994, p. 7.

55 Ueno 1994, pp. 9-11.

56 Favell 2015, p. 244.

57 Thornton 2014, p. 317.

A few galleries did represent their own artists in a way similar to the Western-style galleries: gallery Nichido opened its doors in the 1920s and Tokyo Gallery was founded in 1950 and represented both Japanese and Western artists. However, such galleries were scarce, and not very eager to nurture upcoming artists.⁵⁸ Generally, artists were selected from prestigious art schools such as Geidai in Tokyo, which offered mostly traditional art schooling in styles such as *Nihonga* and *Yoga*.

During these bubble years, a certain separation persisted between the national and international market. Through auctions, most 'art money' from collectors was going overseas. For Japan's own artists, little opportunity was created to obtain international fame.⁵⁹ During the early developments of these markets, the international collaboration posed difficulties among the different art market actors. As According to Ueno, based on remarks by Japanese art dealers, many Japanese collectors preferred to buy 'directly' at auctions, suspicious that the interference of art galleries would unnecessarily raise the prices.⁶⁰ Research has pointed out that for an art market to develop successfully, it is important that galleries are able to obtain a secure position and that works are bought with their mediation.⁶¹

Most collectors were inexperienced with art prices and collecting in general, and were more interested in buying modern masterpieces as investment pieces, instead of fostering young Japanese artists. Other actors of the art market found it difficult to gain a foothold in Japan as well. Giuseppe Eskenazi, a dealer in contemporary art based in London, explains: "All the auction houses found it very difficult to source items locally in Japan. They were often politely rebuffed if they attempted to contact the collectors directly; and if they went to the dealers, they were usually offered rather second-rate goods, as the trade preferred to keep the best items, either their own goods or their clients', to enter into the traditional dealers' closed auctions".⁶²

At the end of 1991, the asset prices on the Japan stock index started collapsing, and soon the auction sales followed. Over the course of two years, the art market took a large hit: the market for modern

58 Favell 2011, p. 86.

59 Cléa Patin-Miyamoto in Wilcox 2016.

60 Ueno 1994, pp. 11-12.

61 Daamen 2001, p. 65, Gubbels, Janssen 2001, p. 6..

62 Eskenazi and Elias 2012, p. 79, referenced by Conrad 2016.

art dropped from 179.7 billion yen in 1989 to 82.9 billion yen in 1991, and the market for contemporary art dropped from 259.8 billion yen in 1989 to 79.9 billion in 1991.⁶³ Because of the focus on the modern Western painting, the Western art market was affected more directly than the market for Japanese art.⁶⁴ Still, the art system in Japan was affected as well: because the new position of contemporary art in Japan was still quite weak, galleries and art magazines went bankrupt, and museum and collector budgets went down as Japan spiraled into the years of economic stagnation. The years that followed, from 1991 to approximately 2000, are often referred to as Japan's 'Lost Decade'. The 'art system' that had been built around the record sales made by Japanese collectors, and had contained bribes, yakuza practice, and the sale of counterfeit artworks, did not prove to be durable in the long term.⁶⁵ The focus on mostly modern masterpieces, as well as the hesitation to work with foreign artists and position themselves in the newly developing art market model largely dependent on network structures between various art market actors, can be regarded as early obstacles to the development of Japan as an international art market superpower.

Cool Japan, Takashi Murakami, and the Post-bubble Market

Although the following years brought economic difficulties to Japan, the bursting of the bubble also brought new opportunities to the Japanese art scene. Mostly through art magazines, global art press had reached Tokyo, and art students were able to read about the exciting art trends going on abroad. In Japan, however, there were few art galleries to represent them, few critics, and no art museums interested in showing contemporary art. The group of wealthy collectors of the former decade had declined, and few people were interested in buying these new students' work. According to Favell, the 1990s were a period of frustration for young artists.⁶⁶ After the "burst of the bubble", people were determined to take matters into their own hands. Around a network of gallery directors, curators, art critics, art enthusiasts and young artists, an art scene started developing in Tokyo. In the following years several art galleries would open their doors, including SCAI The Bathhouse in

63 Ueno 1994, pp. 20-21. The 'art bubble' did not burst immediately: during the early 1990s, many collectors were still able to take out loans to finance new paintings. The lenient ways in which Japan's banks approved loans during these years, were responsible for an even greater bubble effect.

64 Ueno 1994, p. 20. The markets for modern and contemporary art dropped by 53.9% and 69.3% respectively, whereas the Yōga market fell by 42.8% and the Nihonga market by 20.2%.

65 Both Favell 2015 and Thompson 2010 speak of the involvement of yakuza, members of organized crime organizations in Japan in the art sales of the Bubble Period.

66 Favell 2015, p. 86.

1993, Taka Ishii and Mizuma Gallery in 1994 and Tomio Koyama Gallery in 1996 – galleries which still remain among the most important in Japan today and are generally referred to as Tokyo’s “first generation” galleries.⁶⁷ In the following chapters the practice of these galleries will be elaborated on. Japan’s first art fair NICAFA also had its first edition in 1992, offering new opportunities for these galleries to present their artists’ work to the public.⁶⁸ Writers and critics like Min Nishihara and Noi Sawaragi started writing art criticism and reporting on art events.⁶⁹ For the outside world, these would become the years of Japanese Neo-Pop and Superflat, styles that would bring Japan international fame in the art world.

The most internationally famous artist of this generation would become Takashi Murakami. A graduate from the elite Geidai art school, Murakami combined graphic design and pop culture in his recognizable works. Inspired by his traditional schooling in Nihonga painting and otaku and kawaii culture, he developed his concept *Superflat*, which would become the style internationally associated with Japanese contemporary art. Murakami spent part of his early years working in the United States, before ultimately returning to Japan. In Los Angeles, Murakami also met gallerists Blum & Poe, who would represent Murakami and help start his international career. In 2014, they would open a branch of their gallery in Tokyo as well. In 1996 Murakami founded the Hiropon Factory, his art workshop aimed at the large scale production of artworks, both in name and practice reminiscent of Andy Warhol’s The Factory. Next to art exhibitions, Murakami actively expanded his Murakami brand internationally through collaboration with Louis Vuitton, Kanye West, Google, Macy’s, Vogue and COMME des GARÇONS. In 2008 Murakami became the only artist to be included in TIME’s top 100 of the world’s most influential people.⁷⁰ His international fame was also reflected in the rising sales of his art: in 2008 he sold his work “My Lonesome Cowboy” for 13.6 million dollars at Sotheby’s.⁷¹ Although Murakami was also represented by Japanese first generation gallery Tomio Koyama, his sales were mostly done abroad. Frustrated with the Japanese art market, Murakami remarked: “No

67 Okanda 2016, p. 23.

68 Favell 2015, p. 245.

69 Favell 2015, p. 246. Min Nishihara, who was also an artist herself, is regarded as one of the most influential writers of the post-bubble period. She wrote for *Atelier* magazine, and was involved with Takashi Murakami and “Neo-pop” contemporaries.

70 TIME 100, 2008.

71 Favell 2011, p. 23.

one asked me (to exhibit my works in Japan). I don't like making shows in Japan because Japanese people don't understand my point of view".⁷² In various manifestos and articles, Murakami pleaded for Japanese art market reforms. He developed GEISAI, his own interpretation of the Japanese art school, which he saw as old-fashioned. In 2001, it had developed into a bi-annual art fair festival reminiscent of the yearly art academy graduation shows. There was also a competition element, in which an international jury decided on the winner of the year. Although it proved to be very successful for Murakami's own enterprise Kaikai Kiki, it moved international attention away from the galleries and other young artists.⁷³ The young Geisai artists were not represented by art galleries and often knew nothing about marketing their work. Gallerist Misa Shin remarks about Kaikai Kiki that for the long term, GEISAI was not professional enough. When asked about prices, many exhibiting students would not have thought about it, or were not even selling their work. Although she recognizes the efforts made by Murakami to develop an art market infrastructure, she stresses that the whole Japanese art world needs to be involved, including museums, galleries and critics.⁷⁴ Although GEISAI still exists today, its popularity reduced after the initial years of Neo-pop enthusiasm.

Nowadays, the artists of the Neo-pop and Superflat style are among the few Japanese contemporary artists that the international art world knows. During the 2000s, the focus on Japan would ultimately start moving away to different, developing art markets. As mentioned before, Japanese names are rare among the most influential art professionals, and Japanese galleries are scarce at international art fairs. Furthermore, the country itself knows few art events that attract foreigners. During the selective international interest in what foreigners believed to be a representation of Japanese art, there were little possibilities for a durable art system to develop.

The Current State of the Market

As mention before, currently Japan's art market attracts little international attention. Although over the years galleries, contemporary art museums, triennials and art fairs opened their doors, Japan has not succeeded in establishing an internationally successful market structure.

Various authors have argued that the development of an art market largely depends on the ways in which local actors work together. Their network relationships have to be used effectively, and young

72 Okanda 2016, p. 8.

73 Favell 2011, pp. 73-76.

74 Shin in Eubank 2007.

artists should be supported to create new impulses.⁷⁵ From the early 2000s on, a so-called “second generation” of art galleries started opening its doors. These second generation galleries were established by artists and art professionals, who often started their art careers working for the “first generation” galleries. To represent younger artists that reflected their own interests, they ultimately opened their own galleries. In 2008, an association called ‘The New Tokyo Contemporaries’ was established, consisting of seven of these art galleries: Aoyama | Meguro, Aratani Urano, Zenshi, Take Ninagawa, Misako & Rosen, Mujin-to Production and Yuka Sasahara Gallery.⁷⁶ Their official website states their collective purpose as ‘event organization and increasing energy, activity and interest for contemporary art within Tokyo’. Although most of these galleries are remain active today, their website has not been updated since 2011.

Okanda argues that the various sectors of a market need to function for it to work: auction houses, galleries, education, government, museum, collectors and the general culture.⁷⁷ She argues that the art market infrastructure in Japan is too old-fashioned: collectors prefer to buy antiques and modern paintings, education focuses too much on technique instead of creativity and marketing, and museums are not buying contemporary art.⁷⁸ Morishita’s study on Japanese ‘empty museums’ shows Japan has many museums without a collection or curator, hosting temporary exhibitions by other organizations and art groups.⁷⁹

Art professionals in Japan stress similar concerns. According to Misa Shin the art infrastructure in Japan knows only the artistic side – the much-needed commercial side is lacking.⁸⁰ According to gallerist Shigeo Goto, there are three issues to tackle for the Japanese art professionals: developing a new business model, training artists, and creating new buyers.⁸¹ Other gallerists stress the difficulties

75 Velthuis, Baia Curioni 2015, p. 12. Okanda 2016, p. 2, Lee and Lee 2016, p. 103.

76 New Tokyo Contemporaries, official website.

77 Okanda, p. 12.

78 Okanda, p. 15, p. 34.

79 Morishita 2010.

80 Shin in Eubank 2007.

81 Goto in Anetai 2012.

selling artworks as well: Tomio Koyama states that museums in Japan are not interested in buying work that has not accumulated a stable value yet, because there are too few critical voices for people to form their opinion on art.⁸² Sueo Mizuma adds that Japanese gallerists are more “traditional”, since they mostly come from business backgrounds. They are hesitant to invest in younger artists, but “who’s going to support Japanese culture, if not the Japanese?” This causes the contemporary art market in Japan to be fragile.⁸³ Artist Makoto Aida states that “Unlike the West, Japan does not have a bunch of art-hungry rich people”.⁸⁴

Various factors in the development of the commercial contemporary art market in Japan added to its current peripheral position. During its art market boom, it did not succeed in establishing an internationally successful market structure. By not investing enough in local and developing artists, little room was created for artists to develop themselves and for an art scene to blossom. After the burst of the bubble, there was room for Japan’s own contemporary art market to start developing. Although there was a peak in popularity during the eighties, focusing on the ‘kawaii’ art of Murakami and Nara, other artists did not receive attention in the same degree. Difficulties in collaborating with foreign art world actors caused these issues to stay in place. According to Favell, Japan had been naïve in its optimism, and both in content and in opportunity, China appeared to be more interesting. In China, international curators were flown in for exhibition openings, while in Japan, the art world had never truly opened up to the art elite.⁸⁵ Although art world actors are aware of their difficult position, it takes various actors like galleries, education, and collectors’ collaborative effort for an art market to work. The following chapters will elaborate on Japan’s current position in the international art market, in the context of art galleries, art fairs and the representation of artists.

5. Art Fair Participation

82 Koyama in Tsuda 2013.

83 Mizuma in Bold 2013.

84 Aida in Bold 2012.

85 Favell 2011, p. 187.

Over the years art fairs have become increasingly important events in the art market, with new fairs popping up all over the world. Curator Paco Barragán has defined the current times as “the art fair age”, in which art fairs do not only present works of art, but provide novelty, leisure and an overall entertainment experience.⁸⁶ Previous research has pointed out the importance of art fairs for visibility of galleries and their artists in the art world and creating network ties, and for globalization of the art world and market. Next to galleries participating in art fairs abroad, it is essential for countries to have their own art fair, when they want to participate in an international art market.⁸⁷

The ways in which a country's galleries participate in art fairs reveals for a large part to which degree this country's involvement in the international art market. A large involvement in the established international art fairs can indicate a larger trend of globalization among Japanese galleries, while involvement in national art fairs could suggest Japanese galleries' preference for a local art market.

Therefore, for analyzing the case of Japan's art market in a global perspective, it is worth analyzing the position of Japanese galleries' participation in art fairs. Recent research has argued that although Japan is developed economically, it still finds itself in the periphery of the international art market, and plays a minor role.⁸⁸ This has been substantiated recently by Quemín, whose large scale art fair research pointed out that only 4.9% of the galleries participating in the established international contemporary art fairs is from Japan, and only 3% of the most frequently presented artists represented at the international art fairs has a Japanese nationality.⁸⁹ Favell has argued that the Japanese galleries are focusing on an Asian market, fairs and collectors.⁹⁰ Based on gallery and artist participation rates, the general consensus has been that although more galleries and artists from non-Western countries have been participating, the art fairs are not yet globalized.⁹¹ However, Yogevev and Ertug have shown that the participation of non-Asian galleries in Asian art fairs has been

86 Barragán 2008.

87 Hest, Morgner 2014, Thornton 2009, Okanda 2016 wrote on network ties and visibility, while Quemín 2013, Velthuis 2012, Yogevev and Ertug 2015, Velthuis and Curioni 2015, Curioni, Forte and Leoni 2015, Vermeylen 2015 argued for the importance in globalization.

88 Favell 2011, Quemín 2013, pp. 172-173.

89 Quemín 2008, p. 87, and Quemín 2013, p. 170.

90 See also: Favell 2011, p. 250.

91 Quemín 2008, Quemín 2013, Okanda, Velthuis.

increasing over the years, but that Asian galleries' participation in non-Asian fairs has been decreasing, signifying a slight shift towards Asia.⁹² Although this study provides optimistic views of international trends in globalization, unfortunately it does not specify globalization with regards to Japan's galleries. Furthermore, they have focused on the analysis of established art fair participation in fairs such as Art Basel, Art Basel Miami, Art Cologne, and Frieze.⁹³ Although these art fairs are among the most influential for the international art world, galleries that have not achieved this established reputation are excluded from the analyses. Some galleries aim for the international art crowd, and accept the investments that come with it; others prefer the more approachable satellite art fairs, or smaller-scale local ones, or are not (yet) able to afford participation in such high-end art fairs. By not just focusing on the galleries partaking in the established European art fairs, a more inclusive image of globalization of Japanese galleries can be obtained. A broader scope of art fair participation can provide more information about the Japanese art gallery scene.

In this chapter, data about Tokyo galleries' participation in national and international art fairs will be analyzed. First, more information will be provided on art fairs in general and their importance for the international market and globalization. Then, the sample group of Japanese galleries will be analyzed based on their art fair participation behavior, and compared the participation behavior of a small group of 'established' galleries. Then, the participation of galleries in Art Basel and Art Basel Miami Beach over the years will be analyzed. Lastly, special attention will be paid to Tokyo's on internationally aiming art fair: Art Fair Tokyo. By offering different viewpoints towards Japan's market and art fairs, a clearer image of dynamics in globalization can be painted.

The International Art Fair

Originally, art fairs were established in areas just outside of the art world centers, to draw focused attention to the galleries and artists a region had to offer. After the international art market started declining in the late 1980s, new fairs were established to increase visibility and networking opportunities for the few collectors that were left. Different types of galleries grouped together in specialized fairs focusing on different forms of art. Early fairs such as Art Basel and Art Cologne started abandoning their regional focus over the years, and developed into centers of international network structures; a model which has become common among international fairs.⁹⁴

⁹² Yogev and Ertug 2015, p. 205. In their research, "Asia" is defined as the geographical continent.

⁹³ Lee and Lee 2016, Okanda 2016, Quemin 2013.

⁹⁴ Morgner 2014, pp. 34-35, p. 44.

By the time the international art market started recovering at the end of the 1990s, the art fair had established itself as an international institution, and as an intrinsic part of the international art market. Misa Shin, gallerist and previous executive director of Art Fair Tokyo, has put it into terms of convenience: “You cannot go to 19 galleries in one day, but you can if they are in one place. And you can compare the prices next door and buy the artwork depending on your budget”.⁹⁵ Although many collectors already decide on works before the fair has actually opened its doors, the fairs still provide a place for networking, speaking to the gallery owners outside the gallery environment, or for simply making an appearance. Graw argues that the dealer-critic system has paved the way for the newly emerged dealer-collector system, in which collectors have become even more influential than critics in the valorization of contemporary art.⁹⁶ Art fairs are crucial events for galleries to catch up with acquainted collectors and to meet new possible buyers. VIP tickets are made available for known collectors and curators, and elaborate VIP programs are organized to attract renowned art professionals, to increase the popularity and reputation of the fair. Galleries are generally provided with several VIP tickets to give away to collectors, hoping they will pay a visit to their booth. At the gallery booth, the artworks are represented outside of a museum or gallery context. Therefore, the art dealers act as intermediaries, providing context and educating the audience on how to interpret the works.⁹⁷ Furthermore, the fairs are important platforms for reputation and network building, through affiliation with other galleries and the reputation of the art fair itself.⁹⁸ On top of that, art fairs take part in the processes of legitimization/valorization of the arts. Legitimization has been defined as a process in which a social audience collectively evaluates, and accepts an artwork as legitimate, based on a shared framework of values and beliefs.⁹⁹

To participate, galleries are expected to send in an application containing the plans for their booth, which is then assessed by the fair's selection committee. Established fairs like Art Basel and Art Basel Miami Beach, Frieze and FIAC are notoriously hard to get into, and a selection for one year does not

95 Shin in Eubank 2007.

96 Graw 2009, p. 123.

97 Lee and Lee 2016, p. 100.

98 Morgner 2014, p. 40.

99 Curioni, Forti, and Leone, p. 58, Johnson et al 2006, Currid 2007.

guarantee one for the next. Therefore, the galleries choose their fairs selectively. Choices are also based on a gallery's program and aims: Yogev and Grund have analyzed that galleries usually apply to fairs that show similarities to each other in status, focus or artist ages, instead of geographic proximity.¹⁰⁰

For art galleries, these fairs are important events to sell their artists' work: it has been reported that galleries make over 40% of their sales at art fairs.¹⁰¹ However, some years sales are not made, or not enough to cover the participation costs. The costs for a gallery booth in an established fair can range up to 50.000 Euros, not yet including costs for transportation, production and supplies. The total costs for participation with an 80m2 booth at Miami Beach amounts to almost 100.000 Euros.¹⁰² Still, galleries may choose to participate. As one member of Art Basel's admission committee explained in an interview with Sarah Thornton: "The fair is significant from a prestige point of view. If a gallery is not admitted, people might think that it is not as important as another gallery that is. If a gallery is refused next year, it could destroy their business".¹⁰³ Art fairs prove to be not only important for galleries in terms of sales, but also to stay relevant. Based on comments made by gallery owners on their art fair participation, De Stefano has dubbed art fairs as a "necessary evil".¹⁰⁴

National and International Participation

My point of departure is that the same international art fair "rules" apply for Japanese galleries. As mentioned earlier, art fairs can be enormous investments, and do not necessarily lead to immediate sales to cover the costs. Therefore, galleries are selective in their choice of fairs. In analyzing galleries' participations in art fairs, it makes sense to analyze a multiple year period, instead of focusing on participation in one year. In this case, the analysis will be concerned with the years from 2014 to 2016.

For the analysis of participation in art fairs, the gallery sample as elaborated on in the "Methods" section was used. Figure 1 shows the ways in which art galleries have participated in art fairs in the

100 Yogev, Grund 2012, p. 38.

101 McAndrew (2016), referenced by De Stefano 2016, p. 16.

102 Thompson 2010, p. 62, p. 66.

103 Thornton 2008, p. 79.

104 De Stefano 2016, pp. 57-58.

period 2014-2016. Of all Japanese galleries included in the sample, 11.3% did not participate in any art fairs at all. 17% participated solely in Japanese art fairs, indicating a focus on a Japanese market. 15.1% participated outside of Japan, but only participated in art fairs in Asia. 5.7% only showed work at fairs outside of Asia. With approximately half of the galleries, the most common is a combination of art fair participation in both Japan and foreign countries, with 50.9%.

An analysis of the specific art fairs the galleries from this 'combination' group participate in, points out that 88.9% of this group actually participates in more foreign than Japanese art fairs. This shows that a large amount of Japanese galleries is to a certain degree focused on representing foreign artists. A little over 60% Of these galleries participates in more Asian fairs outside of Japan.

Figure 1 also shows that only 32.1% participates either only in Japanese fairs, or only in fairs in Asia. An example of such a gallery is the "first generation" Mizuma Art Gallery. With a second branch in Singapore, the gallery focuses almost exclusively on Asian art fairs. Although the gallery is not participating in the established art fairs abroad, it does occupy an important position on the Asian market and is successful among Asian collectors.¹⁰⁵

From the data based on art gallery participation among Tokyo's contemporary art galleries, we can see that a large part of the galleries focuses abroad. Just a little over half of the galleries participates both nationally and internationally. Of galleries participating in foreign art fairs, Asian fairs are slightly more popular than art fairs outside of Asia. Furthermore, a local focus is also visible: although galleries are also focusing abroad, many participate in local Japanese fairs as well.

The fact that Japanese galleries participate internationally, does not automatically mean they reach a large international audience. There are various types of art fairs which attract different audiences. To give the data above more significance in the context of these galleries' global reach, we should analyze Japanese galleries' participation in the world's most significant art fairs.

Art Basel and Art Basel Miami Beach

Art Basel, taking place yearly in Switzerland, is internationally known as the most prestigious international art fair.¹⁰⁶ In 2002, the fair branched out to Miami Beach for a second location. These two fairs are among the four international art fairs which have a large influence on the value of artworks and set the tone for the art world.¹⁰⁷ Art Basel's third branch in Hong Kong was opened in 2013, aiming to expand to an Asian market: over half of the participating galleries are based in Asia.

105 Favell 2011, p. 107.

106 Thornton 2009, Velthuis 2013, Quemin 2013.

Although this recent branch of the fair has been growing steadily over the years, it has not yet reached the top level reputation of the other locations. Yearly, about 290 art galleries participate in Basel. The Miami Beach location hosts around 270 galleries, and Hong Kong approximately 240. Since the Hong Kong branch has not yet reached the influential level of the other two branches, it will not be analyzed thoroughly, but will be used for comparison with the others.¹⁰⁸ As mentioned earlier, the established fairs offer more possibilities for galleries to reach an international crowd, and are sure to attract the most influential art professionals and collectors. Therefore, it is interesting to examine how many Japanese galleries participate in these fairs and therefore reach this “established” audience. Because of the global nature of these art fairs, participation indicates a more global reach.

Figure 2 displays the participation behavior of Japanese galleries in Art Basel, Art Basel Miami Beach and Art Basel Hong Kong, ranging until 2016. From 1990 until 1993, gallery Nichido was the only Japanese gallery with a booth in Art Basel. In the following years, other galleries would follow. Over the following years, participation would range between zero and five galleries, slowly rising – as discussed in earlier chapters, the nineties were the decade in which many new art galleries were established in Japan, especially in Tokyo. A relatively consistent group started participating in 2001, including Koyanagi, Tomio Koyama, Mizuma Art Gallery, and Taka Ishii, SCAI THE BATHHOUSE, and ShugoArts, often referred to as the ‘first generation’ galleries of Tokyo. With a total of seven galleries participating in 2011 when Taka Ishii joined, the height of Japanese participation was reached in 2011, and again in 2014: over the years, Japanese participation in Art Basel has shown a slow increase. Although participation varies yearly, it is relatively stable and consistent.

When we compare the Art Basel galleries to the Miami Beach galleries, we can see that most of them are from the same, relatively consistent group of participants. In 2014, a decline set in: in 2014, there were 5 Japanese booths, with 2 galleries participating in side events Feature and Statements. In 2016, there were just 3 left, and in the recent edition at 2017 only 2.

These declining numbers for Art Basel seem to coincide with the rising number of galleries at Art Basel Hong Kong, which would suggest that Japanese galleries are moving their business closer to home. Appendix II shows the full lists of participating Japanese galleries. If we look at which galleries stopped participating at Art Basel after the 2014 edition, which shows a visible drop in participation, we can indeed observe that they kept participating in Hong Kong.¹⁰⁹

107 Thompson 2011, p. 60. The other two fairs are TEFAF in Maastricht (for fine arts and antiques) and London’s relatively recent fair Frieze, which opened its doors in 2003.

108 Data collected from Art Basel’s official website, based on participation numbers from 2013-2017.

The results from the Art Basel data analysis show that at the internationally most important art fairs, Japanese galleries are not participating on a large scale. Over the 2014-2016 period, 5.3% of all Japanese galleries participated in the established art fairs, and can be regarded as 'established galleries'.¹¹⁰ In Velthuis' research, 11% of Berlin and Amsterdam galleries was considered established.¹¹¹ Furthermore, Velthuis states that approximately 10% of galleries are established in general.¹¹² In comparison, a relatively low percentage of Japanese galleries can be considered established. This confirms that Japanese galleries are less internationally visible. Still, there has been an increase in participating Japanese galleries since the early 1990s, which was when they first started participating. Furthermore, the recent shift towards Art Basel Hong Kong confirms Favell's argument that Japanese galleries are moving towards an Asian market.¹¹³ Currently, Art Basel Hong Kong has not reached the level of the other two Art Basel branches, but over the years, this fair could possibly provide a more global reach for Japanese galleries.

Art Fair Tokyo

So far we have determined that the established art fairs are gateways for a country's galleries to reach a large international audience. A different method is for a country to have its own international art fair. As mentioned earlier, it is of great interest for a country that wants to develop its contemporary art market to have its own contemporary art fair. A significant art fair can reach an international art public, and help local galleries improve their global reach; therefore, a large local participation by galleries in an art fair does not necessarily mean a low level of globalization.

According to ArtFacts, Tokyo has had a total of five art fairs over the years: 101Tokyo Contemporary Art Fair, and Tokyo Frontline have closed their doors. Currently, there are three fairs: Tokyo International Art Fair, Daikanyama Photo Fair and Art Fair Tokyo.¹¹⁴ These three art fairs all have websites in both Japanese and English, which shows their interest in reaching both a national and an

109 The galleries that participate in Basel, also participate in Hong Kong, indicating that these galleries benefit from both participation in Basel and Hong Kong.

110 Percentage derived from the total group of galleries in Tokyo according to Artfacts, see 'Methods'.

111 Velthuis, p.293.

112 Velthuis, p. 303. This applies to countries that participate actively in the art market.

113 Favell 2015.

114 Official Website Artfacts. Although ArtFacts lists Daikanyama Photo Fair as closed, this is not the case. The 2016 edition was held in October 2016, and the 2017 edition has been announced.

international audience.

With a turnover of 11 billion yen (approximately 86 million Euros) per edition, Tokyo Art Fair is the largest art fair in Japan.¹¹⁵ Furthermore, it is the most popular fair among Tokyo's contemporary art galleries: 45.3% of the sample group participates. Art Fair Tokyo started out as The Nippon International Contemporary Art Fair (NICAF) in 1992, and was re-launched in 2005 as under its new name. The fair is known for including various kinds of arts, including contemporary arts, antiques and art prints. Selection is not very strict, and the fair is approachable even to galleries that have not established a reputation for themselves. One can hypothesize that both this approachability and the geographical nearness make this fair attractive for many Japanese galleries. Looking at the art fair's website from previous years, yearly approximately 150 galleries participate.¹¹⁶

For an art fair to achieve international significance, it is necessary that it attracts a balanced mix between national galleries and galleries from countries that have already obtained an established position on the art market.¹¹⁷ The cases of Art Basel and Frieze, who have mostly selected Western galleries over the years, highlight that this is especially important for peripheral markets: when the participating countries are already established in the art world, it is less necessary to represent a mix of gallery nationalities.¹¹⁸

Earlier research by Okanda reveals that most galleries participating in Art Fair Tokyo are Japanese. In 2015, 90% of the participants was based in Japan.¹¹⁹ A large part of the galleries promoted in the fair's Official Report as "foreign" were actually branches of Japanese galleries in Paris and New York.¹²⁰ Although the fair presents itself as "a platform for the art market, connecting past and present, Asia and the West (...)", it does not attract many foreign galleries. Furthermore, the board members and organization committee consist largely of Japanese people and not much attention is

115 Favell 2015, p. 237.

116 Art Fair Tokyo official website.

117 Quemin 2008, p. 81.

118 Quemin 2013, p. 166.

119 Okanda 2016, p. 28.

120 Okanda 2016, p. 28.

paid to international marketing, which confirms the “Galapagos” image many foreigners have of the Japanese art market.¹²¹ Although the fair aims to be international, the reality is that it mostly appeals to local galleries. The fair fails to attract both international galleries and few articles are written in international art press, although both are necessary for establishing an international reputation. The case of Art Fair Tokyo illustrates a separation between the national and international art market. Although the fair has international ambitions, it does not succeed in obtaining a level of global significance.

However, the fair is popular among Japanese galleries. Various type of Japanese galleries participate; apart from smaller galleries which participate in Art Fair Tokyo yearly, the fair also attracts established ones such as “first generation” galleries Tomio Koyama, Taka Ishii and Mizuma Art Gallery. This suggests that even galleries that have the funds and possibilities to aim international are still interested in maintaining a local network.

Compared to the “second generation” galleries as defined earlier, the first generation galleries show larger national focus. Of the group of second generation galleries that collaborate as the New Tokyo Contemporaries, only one of the seven galleries has participated in Art Fair Tokyo between 2014 and 2016. Although their website mission statement is to focus on “event organization and increasing energy, activity and interest for contemporary art within Tokyo”, this goal is not reached through local art fairs. Jeffrey Rosen from second-generation gallery Misako & Rosen explains: “There’s no context for a fair to really work in Japan. (...) It doesn’t make sense to have an art fair before you have an art market, and it doesn’t make sense for you to have an art market before you’ve generated a cultural context out of which a market develops”. His gallery does not participate in Asian art fairs at all, because Rosen states there is no real collaboration. Therefore, they focus on larger international fairs like Frieze and focus on the co-organization of international events.¹²²

The art fair participation behavior of Japanese contemporary art galleries shows that a large part of galleries does participate in art fairs. Almost three-quarters of the galleries participates in foreign art fairs, showing the persisting interest among Japanese galleries in reaching a foreign audience. This shows that based on art fairs, Japanese galleries are more globalized than expected.

However, if we look at the participation rates for the established art fairs that have the largest possibilities for functioning as gateways for Japanese galleries to reach the core of the art world, we

121 Okanda 2016,p. 29.

122 Rosen in Kerr 2015.

can see that the percentage of galleries participating there is relatively small. In the case of the three Art Basel branches, the opening of Art Basel Hong Kong seems to have led to a decline in participation of Japanese galleries in the main art fair in Basel.

Interestingly, first generation galleries keep participating on a large scale in national art fairs, even when they have obtained an established position. However, currently the national market is not flourishing, nor does it reach a foreign audience. First generation galleries are dedicated to the national art market, but show a large desire to participate globally as well. Among the second generation however, a change is visible. Their participation data indicate a shift towards international art fairs located outside Asia.

6. Artist Representation

Art galleries, defined as the art market's gatekeepers by Moulin, Bystryn and Velthuis, occupy an

important position in the career trajectories of artists.¹²³ By representing and nurturing the careers of artists, galleries play an important role in introducing them to the market, and establishing their reputation. For these artists, the primary market and gallery sales are of a different importance than sales on the secondary market: although auctions can increase the value and reputation of an artist's work, the first time a work is sold with the mediation of a gallery brings money directly to the artist.¹²⁴ Representation by a dedicated gallery is the favored way to lead to international exposure, and to exhibitions and demand abroad. Therefore, the choices that galleries make in their representation of artists can be of influence on the way their countries' artists reach the international art world: with art galleries being one of the main players in the primary art market, the globalization of a country's art market is to a large degree influenced by their activities, and by which artists make the cut for representation.

The degree to which a gallery represents artists from other countries than the country in which it is based, gives an idea of the degree of globalization of the gallery. Knight Landesman, one of the Artforum's publishers, remarks "Twenty-five years ago, most galleries were national. Nowadays there is hardly a gallerist anywhere that just shows the artist of his or her country. It would mean they were provincial and limited".¹²⁵ Velthuis and Baia Curioni stated that art dealers representing only local artists are viewed as conservative, just like "local" artist has become to mean "insignificant": being international has become a selling point.¹²⁶ A true globalization of the art world would suggest that galleries would represent artists from a wide range of nationalities.

Velthuis has defined a regional focus in the representation of artists as a gallery's 'home bias'. A present home bias means that the artists represented by a gallery largely come from the country in which the gallery is based. Velthuis argues that a present home bias and preference for European and Northern American artists show that the globalization process is still in its initial stage.¹²⁷

123 Moulin 1987, Bystryń 1978. Velthuis 2013.

124 Reutter 2001, p. 14.

125 Thornton 2008, p. 89.

126 Velthuis and Baia Curioni 2015, p. 4.

127 Velthuis 2013. Established means in this case that a gallery participated at least once in Art Basel or Art Basel Miami Beach in the period between 2000 and 2008.

The previous chapter on Japanese galleries' participation in art fairs has shown that most galleries try to participate internationally, as well as on a national level. The established galleries have shown a shift towards Asian art fairs over the last years. This chapter will focus on the nationalities of the artists that Tokyo galleries represent, to provide a clearer picture of their degree of globalization.) First, more information will be provided on the importance of gallerist-artist relationships and the ways in which gallerists choose the artists they will represent. Following, this chapter will look at the nationalities of artists that are represented by Tokyo's contemporary art galleries. Their home bias will be defined, to find out to which degree these galleries represent artists from their own country. To what degree can these galleries be defined as globalized, based on the nationalities of their artists? Specific attention will be paid to the few galleries that are participating in the most established international art fairs Art Basel and Art Basel Miami Beach. An analysis of the nationalities of the artists these "established" galleries represent will provide for more insight into the nationalities of the artists that are most likely to reach the largest international audience through Japanese galleries, and more information on the ways in which Japanese artists are represented internationally.

Gallerist-artist relationships

Gallery owners carefully select artists for representation, since the reputation of the artists add to the trustworthiness of the gallery itself and its position on the market. For artists, representation by a renowned gallery can bring about important network opportunities and often a guaranteed solo exhibition every few years. In return, agreements are made about the artist's works and possibly exclusive representation by the gallery.¹²⁸ Although contractual agreements are sometimes made between galleries and artists once their collaboration has been decided on, both parties prefer relationships based on trust over contractual relationships.¹²⁹ It's not uncommon in the art world to work without clear contracts, which on occasions has even led to lawsuits between the concerned parties.¹³⁰ Velthuis explains that it is difficult to put the artist-gallerist relationship into contractual terms for various reasons. One of the main issues is that artists cannot be forced by their gallerist to create works of a certain value for a set period. Furthermore, it would be difficult to keep track of

128 Reutter 2001, p. 132.

129 Joy, 1996, p. 89.

130 See for example the copyright lawsuit against Gagosian Gallery concerning reproduction of Franz West chairs, or the recent 2015 lawsuit which obligated artist Danh Vo and his gallery to produce several new works for collector Bert Kreuk. In both instances, conflicts were based on unclear or 'casual' contracts that were not put on paper.

whether or not both parties are following the agreements. In case of contract breaches, lawsuits are expensive, as are the contracts and monitoring costs itself. Ultimately, a lawsuit or conflict could be harmful for the reputation of both gallerist and artist.¹³¹ Therefore, a good relationship between artist and gallerist is important. In the case of Japan, research on business strategies has confirmed the importance of status hierarchies and strong network ties when conducting business.¹³²

Regarding how exactly artists are chosen for representation, gallery owners tend to stay vague. Famous New York gallerist Betty Parsons stated the major idea behind her gallery as “[...] creative, to find what’s going on creatively in our day. That’s the working principle”.¹³³ London gallerist Victoria Miro states: “You can’t predict [an artist’s career]; you have the right feeling, intuition, but you don’t know”.¹³⁴ LA-based Jeff Poe, from the gallery Blum & Poe which occupies a central position in the Japanese art market, states it is about having a “good eye”, which entails recognizing a great artist and picking their best works.¹³⁵ Such statements correspond with explanations given by several established gallerists from Japan. Sueo Mizuma from Mizuma Art Gallery states that he is mostly interested in “artist’s thinking and philosophy”.¹³⁶ His gallery website states they represent “artists with a unique voice, whose works aren’t caught up in fleeting trends”.¹³⁷ Tomio Koyama states he chooses artists that put their inner selves into their work, and have great techniques. Furthermore, the artists shouldn’t follow authority and common opinion too much.¹³⁸

Such statements suggest that artist selection is based on the qualities of the artwork itself, and the creativity of the artist, and a certain “feeling” or “intuition”. However, scholars have suggested that

131 Velthuis 2011, p. 29.

132 Conrad 2016, p. 251.

133 Bystryn 1978, 398.

134 Wullschlager 2013.

135 Poe in Thornton 2008, p. 97.

136 Mizuma in Bold 2013.

137 Mizuma Art Gallery, official website.

138 Koyama in Tsuda 2013.

there are more ways which determine which artists are selected for representation. Reutter has argued that the personality and communication skills of an artist are just as important as his work for selection. After all, the collaboration with and the marketing of an artist are important factors for a gallerist. Furthermore, the marketability of an artist is of increasing importance for the possibilities of economic rewards. Although art world insiders generally do not like to discuss money, Reutter suggests that this plays an important role as well. Because of the importance of an artist's marketability and because the gallerist and artist work together in trust-based relationships, it is common for gallerists to select artists based on recommendations by befriended artists or gallerists.¹³⁹ Adding to this, interviews done by Favell with first generation Tokyo galleries suggest that the first generation of Tokyo art galleries and the art scene around it developed around artists and art enthusiasts, who were frustrated with the condition of the Tokyo art scene at the time. This included gallerists such as Tomio Koyama, Tim Blum, and Yuko Yamamoto, and artists like Takashi Murakami, they had known each other from school etc. Favell's book shows interviews and anecdotes about the forming of these art networks, which were based on personal networks and study friends.¹⁴⁰ Such information supports the idea that networks tend to form locally.

Velthuis shows that gallerists are likely to select artists nearby. Based on the remarks made by foreign art world professionals about the difficulties in working with Japanese art galleries, one could hypothesize that similar methods are used in Japan. A model that Velthuis suggests is the cultural affinity model. According to this model, selections are based on preferences which generally coincide with local values, styles and values.¹⁴¹ This model can be supported by the theory of cultural discount, referring to the notion that certain products are rooted in a local culture, and are therefore most appealing to a public with similar cultural backgrounds, enabling them to identify with the expressed notions. In the case of Japan, this has been connected to the local preferences for Japanese films and music, and general impenetrability of the Japanese market for foreigners. The Japanese film industry, for example, is largely self-sufficient, with the exception of a number of

139 Reutter 2001, p. 18. Reutter does stress that the importance of economic factors differs for each gallery. Bystryn 1978 provides for more extensive examples of personal gallerist-artist relationships in various types of art galleries. For more information on the disavowal of the economy in the arts field, see Bourdieu 1980.

140 Favell 2011, pp. 86-90.

141 Velthuis 2013, p. 295, Hannerz 1992, Crane 2002.

Hollywood imports.¹⁴²

The Home Bias of Japanese Galleries

The total number of artists represented by the sample galleries is 1138; an average of 21.5 artists per gallery. Figure 3 shows the nationalities of the artists represented by the sample group, and by the “established” galleries as defined in the previous chapter. The nationalities have been divided in three groups: Japanese, Asian (other) and non-Asian.

Figure 3 shows that the larger part of the artists has a Japanese nationality: 77.1%. 6.2% is Asian (other), and 16.7% is from a foreign country outside of Asia. For the established galleries, a similar pattern is visible, however slightly different. The percentage of Japanese artists is slightly lower with 67.1%. Foreign artists from Asian countries make up 4.2%, and foreign artists from countries outside of Asia amount to 28.6%.

In both categories a home bias is present, with an overwhelming amount of the artists being Japanese. Based on geographical nearness and possible cultural affinities, one would expect Asian artists to be popular among gallerists as well; however, more non-Asian artists are represented. We can see that the established galleries represent less Japanese artists in general, as well as less Japanese artists. The established galleries represent even more non-Asian galleries than the main sample group.

To interpret the significance of Japan’s home bias, it would be useful to compare it to galleries from other countries. Unfortunately, little research has dedicated itself to defining the home bias in other countries. Velthuis has shown the home bias for established Amsterdam and Berlin galleries to be 29.1% and 43.6% respectively.¹⁴³ Compared to these two examples, the home bias in Japanese galleries lies significantly higher at 77.1%. These data signify a lower level of globalization in Tokyo galleries compared to the art galleries in these Western-European countries. Galleries with such established reputations have international aspirations, and generally possess the finances needed for maintaining a global network. In Tokyo, the galleries which qualify for the same reputation make up 6.6% of the total, based on their participation in Art Basel or Art Basel Miami in the years ranging from 2014 to 2017.¹⁴⁴ Figure 3 shows the home bias of Japanese galleries for both galleries in Tokyo in general, as well as the home bias for the small group of established galleries. We can see that in the case of the established galleries, the home bias lies at 67.1%: lower than the average among all Tokyo

142 Hoskins and Mirus (1988), cited in Iwabuchi 2002, p. 26, 169. Also noted by Crane 2002, and Van Hest 2012.

143 Velthuis 2013, p. 294.

galleries, but still significantly higher than the average for Berlin and Amsterdam.

This means that the established galleries still represent relatively many Japanese artists, but are more likely to represent foreign artists than the non-established galleries.

Interestingly, more non-Asian artists than artists from other Asian countries are represented. Figure 4 zooms in on the group of non-Japanese artists and shows the nationalities that are most represented by the sample galleries. Countries with less than 2% of the artists have been grouped together in 'Others' and make up 27.3% of this group. In the top ten are seven Western countries. The large presence of European and Northern American artists in Japanese galleries might be explained by the core-periphery model, which implies that there is a core and periphery of the world. It doesn't account for small scale decisions by art galleries.¹⁴⁵ This model suggests that the peripheral markets reflect the core regions, and would explain the popularity of artists from countries such as the United States (28.4% of the non-Asian artists), Germany (16.3%), England (6.3%) and France (5.8%). Although Japan would be classified as a core country based on the country's large economy, in the art world the country would belong to the periphery. Furthermore, China and Indonesia make up for large parts of the group, with 11.9% and 6.2% respectively. Both are developing economies and art markets and geographically closer to Japan. Especially China has been a rising country in the international art world in the last years. Cuba makes up 2.3% - however, these artists are all represented by one Japanese gallery which represents solely Latin American artists.

Figure 3 and 4 have shown the nationalities of all represented artists when grouped together. To see how globalized the galleries are in general based on these nationalities, figure 5 shows the percentage of galleries that represents foreign artists. Figure 5 reveals that 34% of the galleries exclusively represents Japanese artists.¹⁴⁶ 9.4% represents a percentage of 50% or higher of non-Japanese artists. Approximately one third of all galleries represents only Japanese artists. Only a small group of galleries represents over 50% foreign artists, which would signify a more globalized

144 The fairs used for selection were the same as used by Velthuis in his 2013 study, only for more recent years. Not included was Art Basel Hong Kong, which is known to have a less strict selection process (see the earlier chapter on art fair participation). These galleries were defined as "established" based on their participation in prestigious art fairs between 2000 and 2008, signifying a good reputation and international orientation.

145 Wallerstein 1974, also cited in Velthuis 2013, p. 297. Velthuis does stress that this model does not account for small scale decisions by art galleries.

146 Percentages are rounded to the first decimal place.

representation of artist nationalities.¹⁴⁷

But what do these data actually tell us about the degree of globalization in artist representation? Concluding, the data have pointed out that there is a large home bias present among Japanese galleries, especially compared to the ones from Amsterdam and Berlin galleries. Established galleries are more likely to have networks and funds to represent artists abroad, and this can be seen in a slight increase in representation of Western European and Northern American countries. Still, they largely represent Japanese artists as well.

Overall, the galleries that show a considerable degree of global aims with over 50% foreign artists come down to 9.4%. We can see that when Japanese galleries choose to represent foreign artists, they are most likely to choose artists from Western Europe or Northern America, with the exception of China and Indonesia. Artists from Africa or Southern America are rarely represented. Although international artists are being represented by a large part of the galleries, the division of nationalities and large home bias shows that globalization is still in an early phase.

Conclusion

The data analyzed confirm the hypothesis that Tokyo's contemporary art galleries show a low degree of global activity, based on their artist nationalities and art fair participation. Since galleries without websites in English were excluded from the sample, it is probable that the market is even more locally oriented than my research suggests. Problematic for globalization is that Japan's own art market struggles to attract foreigners, as has been illustrated with the case of Art Fair Tokyo. Japan's own art market developed in a way that did not promote an environment in which Japanese artists and other art professionals could flourish: due to hesitations in international collaboration, and hesitancy to support a local market, Japan never really opened up to the foreign art crowd.

147 Among this group there are a few specializing exclusively in foreign art, e.g. Promo-Arte, focusing on Latin-American artists.

Still, it would be too much to define Japan's contemporary art market as 'Galapagos'. A part of the galleries shows international aims, and there is an awareness among art market actors of the position of the market. However, to reform an art market, collaborate efforts are needed. Second generation art galleries aim to develop the local art scene with exhibitions, events and the representation of young artists, but their art fair participation shows a shift abroad.

Regarding globalization, it still seems to imply a focus towards the Europe and Northern America. The slight shift towards an Asian market that has been appearing, could over the years provide art galleries with more opportunities to reach an international audience.

Limitations

Due to the limitations in understanding of the Japanese language, further research would benefit from the inclusion non-translated Japanese sources. Connected to this, my study offers an outsider view; more input from insiders could provide the research with the personal aims of these art galleries, and explain to a certain degree the data outcomes. Furthermore, an analysis of the Japanese-only gallery websites that are now excluded from the sample could provide information on the way these galleries operate in the context of globalization.

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Appendix I: Charts

Figure 1 - Japanese Galleries' Participation in Art Fairs

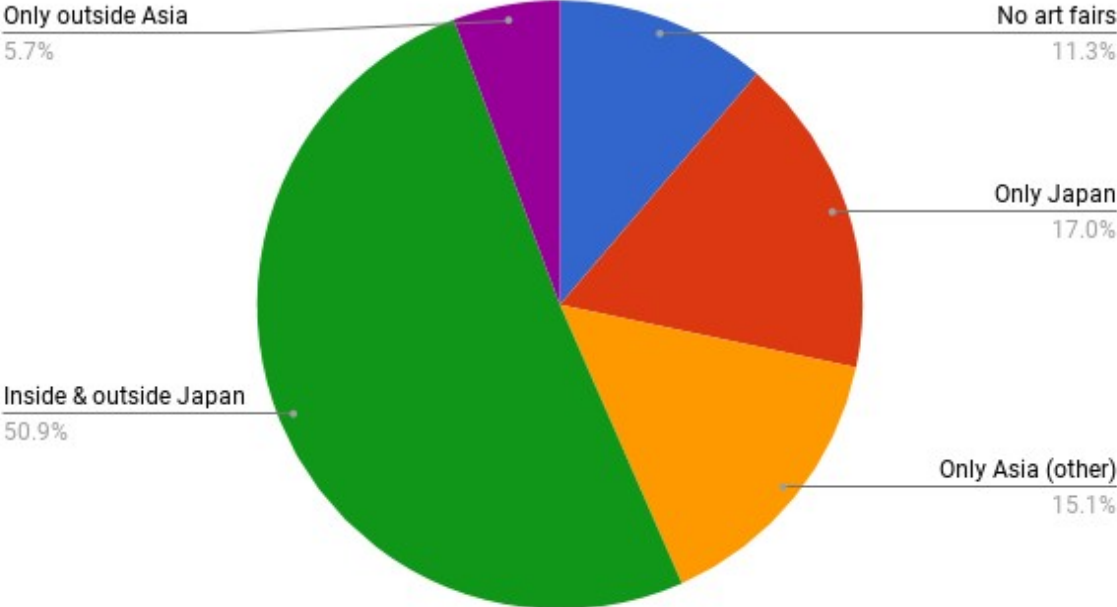


Figure 2 - Number of Japanese Galleries at Art Basel

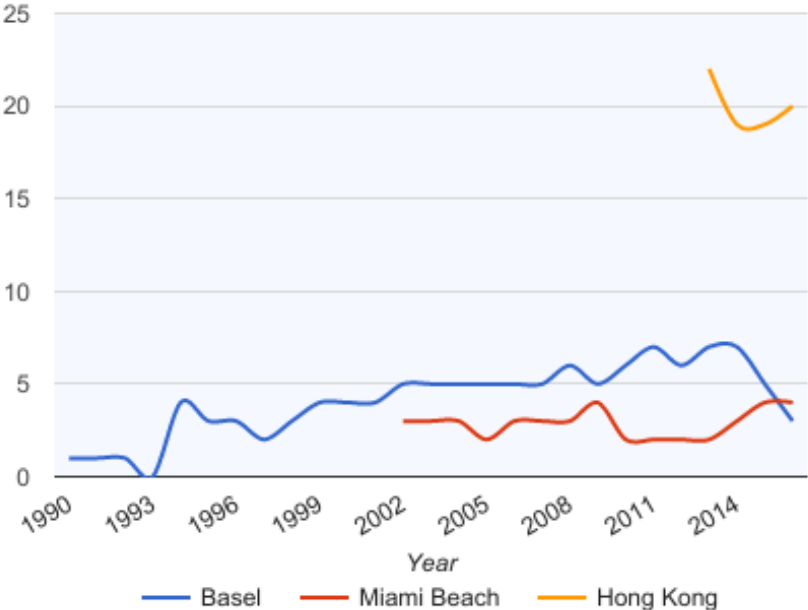


Figure 3 - Nationalities of represented artists

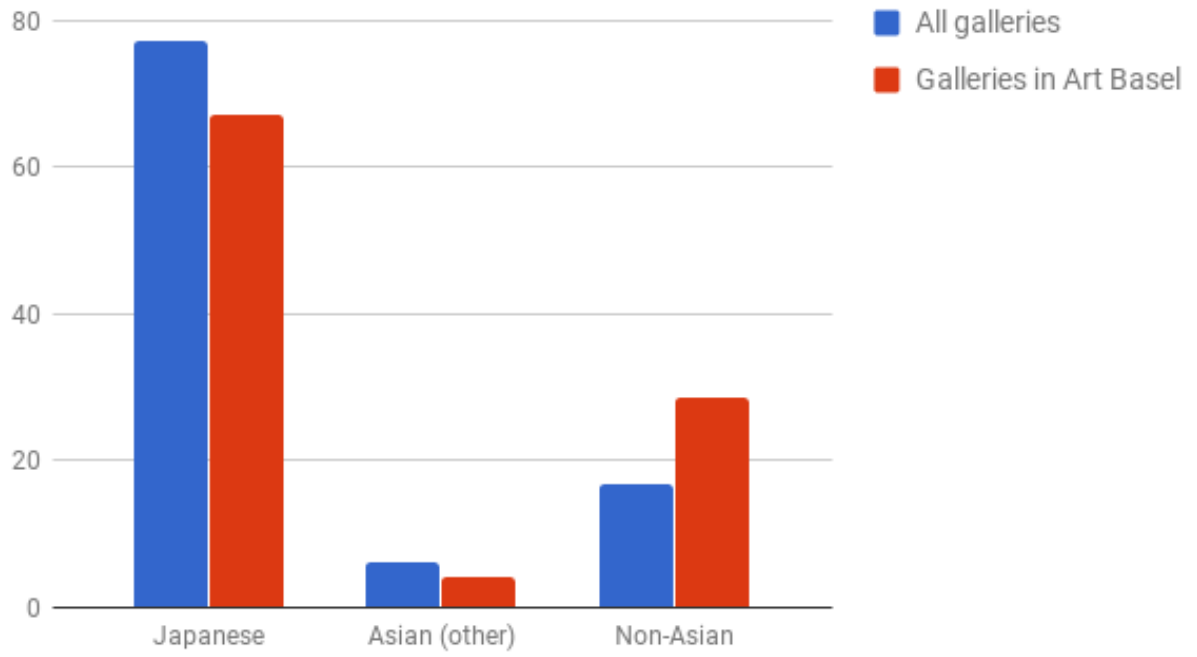


Figure 4 - Nationalities of non-Japanese represented artists

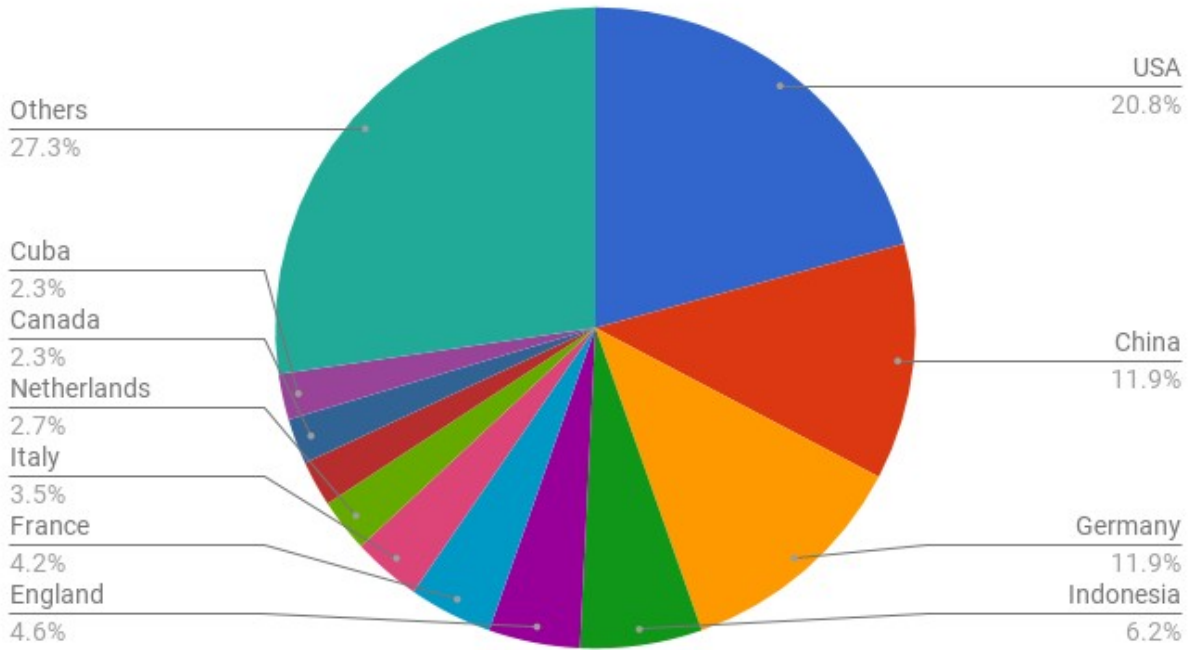
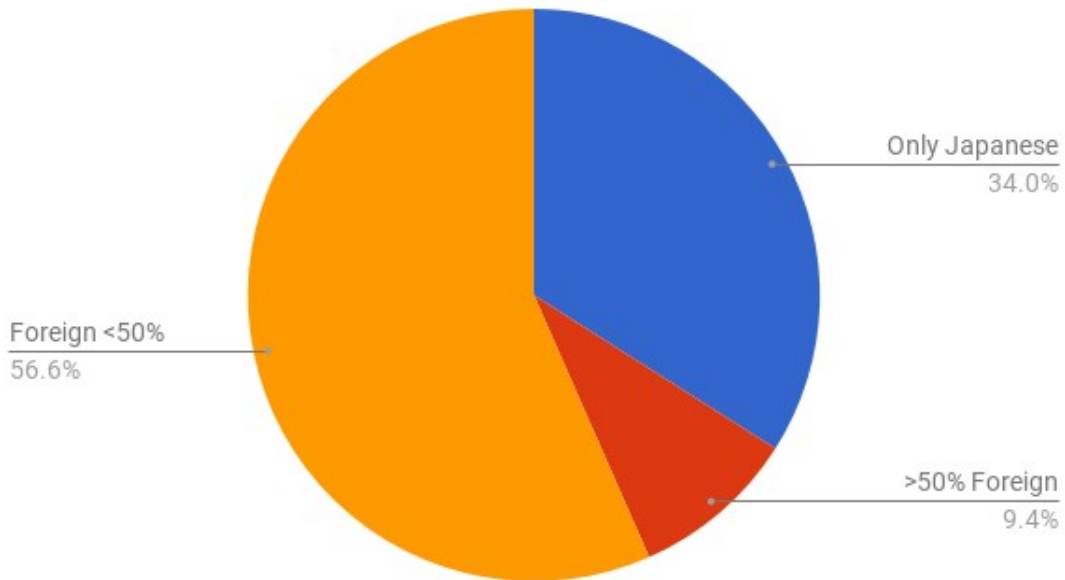


Figure 5. Percentage of galleries and their artists' nationalities



Appendix II: Japanese Art Galleries Participating in Art Basel

Art Basel

1990: Nichido, Tokyo

1991: Nichido

1992: Nichido

1993: -

1994: Gallery HAM, Nagoya; Kamakura, Kanagawa; Kodama, Kyoto; Roentgenwerke, Tokyo

1995: Kamakura Gallery, Kanagawa; Kodama, Kyoto; Roentgenwerke, Tokyo

1996: Kamakura, Kanagawa; Kodama, Kyoto; Roentgenwerke, Tokyo

1997: Kamakura, Kanagawa; Roentgenwerke, Tokyo

1998: Gallery Gan, Tokyo; Kamakura, Kanagawa; Roentgenwerke, Tokyo

1999: Koyanagi, Tokyo; Roentgenwerke, Tokyo; Satani, Tokyo (closed); Shimada, Tokyo

2000: Koyanagi, Tokyo; Roentgenwerke, Tokyo; Satani, Tokyo (closed); Shimada, Tokyo

2001: Tomio Koyama, Tokyo; Koyanagi, Tokyo; Shimada, Tokyo; Side2, Tokyo

2002: Tomio Koyama, Tokyo; Koyanagi, Tokyo; SCAI, Tokyo; Shimada, Tokyo; ShugoArts, Tokyo

2003: “

2004: “

2005: “

2006: “

2007: “

2008: Tomio Koyama, Tokyo; Koyanagi, Tokyo; SCAI, Tokyo; Shimada, Tokyo; ShugoArts, Tokyo;
Hiromiyoshii, Tokyo

2009: Tomio Koyama, Tokyo; Koyanagi, Tokyo; SCAI, Tokyo; Shimada, Tokyo; ShugoArts, Tokyo

2010: Tomio Koyama, Tokyo; Koyanagi, Tokyo; SCAI, Tokyo; Shimada, Tokyo; ShugoArts, Tokyo;
URANO, Tokyo

2011: Tomio Koyama; Koyanagi, Tokyo; Nanzuka, Tokyo; SCAI, Tokyo; ShugoArts, Tokyo; Side2, Tokyo;
Taka Ishii, Tokyo

2012: Tomio Koyama; Gallery Koyanagi; SCAI; Shugoarts; Side2; Taka Ishii gallery

2013: Tomio Koyama; Koyanagi; SCAI; Shugoarts; Side2; Taka Ishii; Take Ninagawa

2014: Taka Ishii Gallery; Tomio Koyama Gallery; Gallery Koyanagi; SCAI; ShugoArts; Feature: take
Ninagawa; Statements: Side 2

2015: Taka Ishii Gallery; Gallery Koyanagi; SCAI; Take Ninagawa; Feature: Tokyo Gallery + BTAP

2016: Taka Ishii Gallery, SCAI, Take Ninagawa

2017: Taka Ishii; Take Ninagawa

Art Basel Miami Beach

2002: Tomio Koyama; Mizuma Art Gallery; Taka Ishii

2003: Tomio Koyama; Mizuma Art Gallery; Taka Ishii

2004: Tomio Koyama; SCAI; Side2

2005: Tomio Koyama; Side2

2006: Tomio Koyama; Shugoarts; Taka Ishii

2007: Tomio Koyama; Shugoarts; Taka Ishii

2008: Tomio Koyama; Shugoarts; Taka Ishii

2009: Hiromiyoshii; Tomio Koyama; Mizuma; Taka Ishii