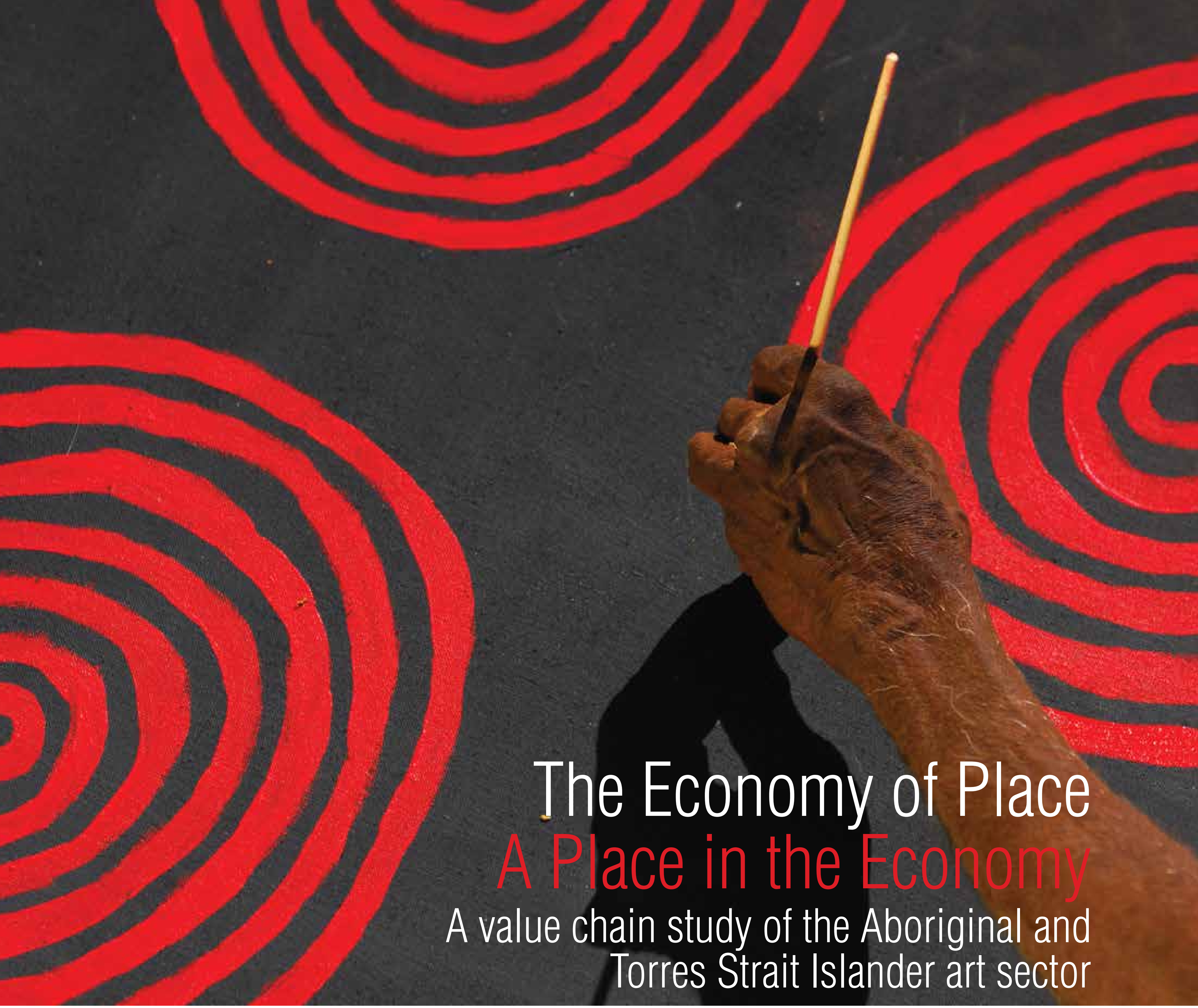


The Economy of Place
A Place in the Economy
A value chain study of the Aboriginal and Torres Strait Islander art sector

Summary report

Cover: Artist at work, Kayili Artists. Photo by Tim Acker
Right: Desert country: Water, land, sky. Photo by Tim Acker

Income from art production is the only source of commercial income for people in many remote and very remote Aboriginal and Torres Strait Islander communities.

Navigating in Ngaanyatjarra country. Photo by Tim Acker

CONTENTS

INTRODUCTION

The Aboriginal and Torres Strait Islander art sector is vital to Australia in many ways. It reinforces Australia's identity as the place in the world with the longest continuing human culture. It bears witness to continuing occupation of Australia by Aboriginal and Torres Strait Islander peoples and to the richness and diversity of their cultures. It shows respect for the continuity of Aboriginal and Torres Strait Islander cultures and the valuable lessons that they have to convey to all people in the world.

While Aboriginal and Torres Strait Islander cultures have lived for thousands of years, and museums have collected their artefacts for around 200 years, it is only more recently that these cultural products have been displayed, talked about and marketed as art.

The 1980s and 1990s were boom years for Aboriginal and Torres Strait Islander art in Australia, with galleries and collectors investing in the art, and governments investing in the Art Centres where much of the art is made. For various reasons that boom has passed, and the sector needs to evaluate its circumstances.

This study examines Aboriginal and Torres Strait Islander art, artists and art businesses over the 20 years to 2013. The results give a broad and detailed picture of the sector, enabling consideration and understanding of where it has been, where it is now and how it might develop in the future.

The value chain study of the Aboriginal and Torres Strait Islander art sector was undertaken over more than two years by researchers Dr Alice Woodhead and Tim Acker, with the support of over 200 Art Centres, art businesses, individuals and funding agencies that contributed data, time and ideas. The five reports of the value chain study of the Aboriginal and Torres Strait Islander art sector highlight the opportunities and challenges as well as the problems of remote area art production, sales and businesses. The five detailed reports are *Synthesis, Methodology and Art regions, Art Centre finances, Artists and Art Centre production*, and *Art business trading practices and policy views*. This summary draws on the five reports to provide an accessible account of the changes and challenges facing the sector.

GOALS OF THE VALUE CHAIN STUDY

The value chain study aims to enable change by informing artists and art businesses about the scope and scale of the Aboriginal and Torres Strait Islander art sector. It seeks to understand the production and sale of visual art from Aboriginal and Torres Strait Islander communities in remote and very remote Australia and to suggest valuable insights into how the industry can maintain a sustainable place in the lives of remote artists, their communities and art businesses.

The study surveys data from Art Centres, government agencies and public and private art businesses. It fills crucial gaps in our understanding of remote Aboriginal and Torres Strait Islander art production to contribute to a better understanding of economic and commercial issues for the art, the artists and their communities.

It increases awareness of the many different factors involved in art production and of the interdependencies between artists, art businesses and audiences.

When artists, Art Centres, galleries and government know more about the links in their art value chain, they will be better able to respond to changing circumstances.

Art production and art market trends need to be better understood to enable sustainable development of this important industry.

THE ART REGIONS

A	Arnhem
APY	Anangu Pitjantjatjara Yankunytjatjara
C	Central
CD	Central Desert
ED	Eastern Desert
FNQ	Far North Queensland
K	Kimberley
OB	Outback
T	Tiwi
SI	Torres Strait Islands
WC	West Coast
WD	Western Desert

ART REGIONS MAP

This map shows the number and spread of Aboriginal and Torres Strait Islander Art Centres and their art regions across the breadth of remote Australia (the list of Art Centres in each region is given in the Appendix).

Different languages are spoken at different Art Centres; they are surrounded by different terrain; and different conditions prevail, socially, culturally and historically.

Some Art Centres have been established for a long time and have strong links to major city galleries; others are new, with few established outlets. There has been an increase in the number of remote area Art Centres from 61 to 87 in the years 2003–12.

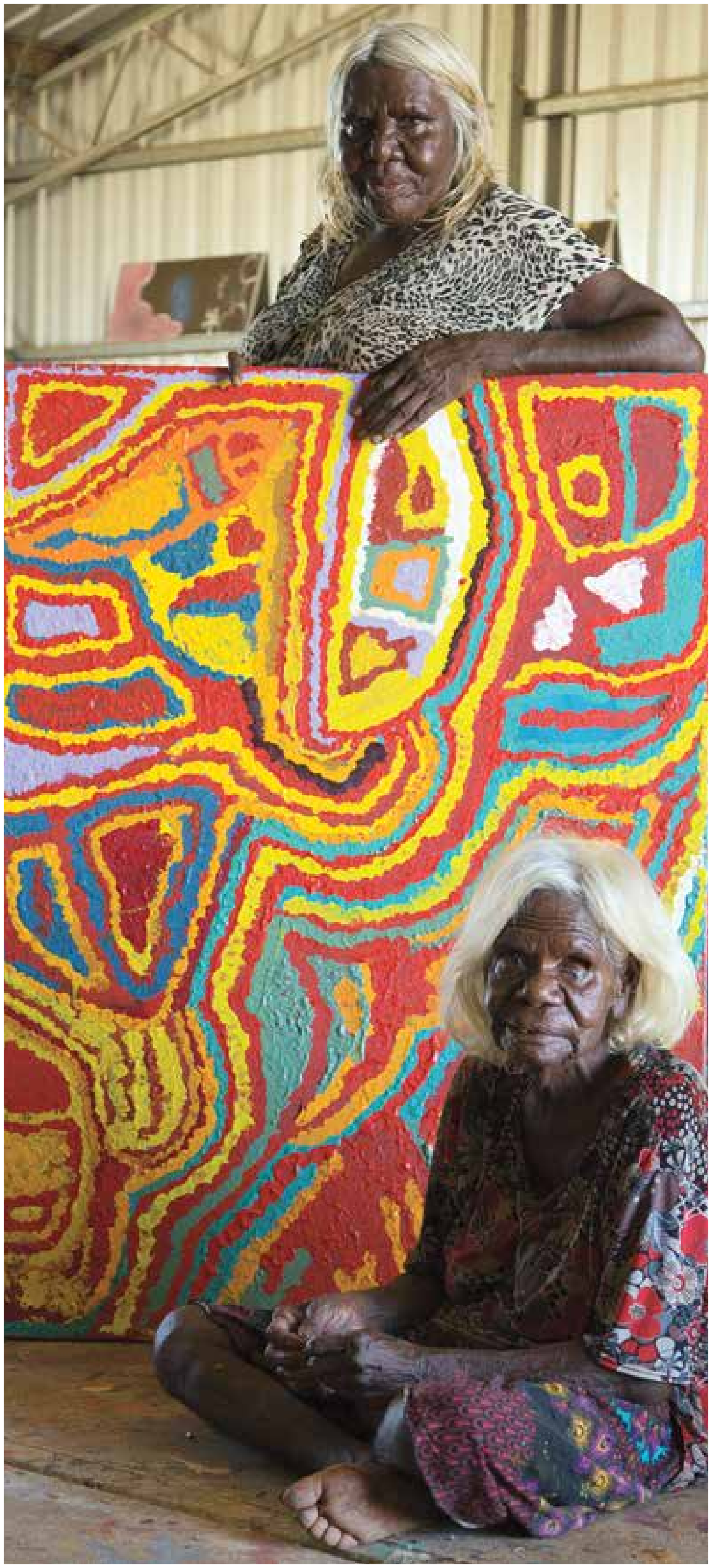
The variations between Art Centres and artists are emblematic of the diversity of remote Australia. This variety also presents significant challenges in managing, funding and supporting Art Centres.

The study divides remote and very remote Australia into 12 art regions based on cultural and aesthetic characteristics.

There are about 13,000 artists working for Art Centres and about 875 artists working freelance. This research focuses on artists working for Art Centres. The figures below come from the art value chain research and in most cases use data covering the period 2003/04–2012/13.

REGION	MAIN LANGUAGE	ARTISTS	ART CENTRES	ART
ARNHEM LAND The Arnhem Land region encompasses the north-eastern portion of the Northern Territory. Several Art Centres here are among the oldest in Australia. Arnhem Land art forms a distinctive genre of Aboriginal art, and the work is represented in national and international collections.	Yolgnu Matha	1,723 in a population of 7,095	Six operating Art Centres, which also service a network of numerous and active outstations. Two of the Art Centres have galleries.	Ochre paintings, sculpture, yidaki (didgeridoo), digital media
ANANGU PITJANTJATJARA YANKUNYTJATJARA LANDS The Anangu Pitjantjatjara Yankunytjatjara Lands are a desert region of northern South Australia. Ernabella Arts is one of the longest continuing Art Centres in Australia, and recent years have seen artistic expansion and development across the region.	Pitjantjatjara and Yankunytjatjara	718 artists in a population of 2,071	Seven Art Centres, all of which have a strong network of commercial galleries in capital cities established over many years, creating a high profile of exhibitions, critical acclaim and strong sales for the region.	Acrylic paintings, textiles, weaving, small sculpture
CENTRAL The Central region is the area in the middle portion of the Northern Territory, from north of Alice Springs, through to the Katherine/Daly River region.	Many	684 in a population of 8,735	Eight Art Centres, three with shopfront/galleries, one with an interpretive centre, gallery and café. Tourism is important but highly seasonal. The region has no strong network of commercial galleries and only limited national recognition.	Acrylic paintings, carvings, prints
CENTRAL DESERT The Central Desert region encompasses Art Centres and projects within an approximate 100 km radius of Alice Springs in the Northern Territory.	Luritja, Warlpiri and Kaytetye	1,054 in a population of 6,596	Nine Art Centres, four of which service individual communities; five are based in Alice Springs – most of these five have a gallery/shop. This region contains a wide spectrum of Art Centre models; however, only a small minority of the Art Centres have strong commercial partnerships.	Acrylic paintings, watercolour paintings, ceramics, sculpture, carving
EASTERN DESERT The Eastern Desert encompasses a small number of Art Centres operating in the desert area north-east of Alice Springs. It is a distinctive and important region for art and has been recognised nationally and internationally.	Kaytetye, Alyawarre and Anmatyerre	383 in a population of 900	Two Art Centres, each working with discrete communities and outstations; one has a shopfront/ gallery; one has had some commercial success.	Acrylic paintings, carvings, weavings
FAR NORTH QUEENSLAND Far North Queensland encompasses all of Cape York Peninsula as well as the islands of the Gulf of Carpentaria and a small area of remote Queensland south of Cairns (the Cardwell region).	Wik, Kugu, Kuku Yalanji, Lardil and Ganggalida	381 in a population of 6,802	Eight Art Centres, with enormous variability in size, performance and history; most have a gallery/ retail space; only a few have had any significant commercial success.	Acrylic paintings, carvings, weaving, sculpture, printmaking
THE KIMBERLEY The Kimberley art region in Western Australia has a long history of Aboriginal art; it produces some of Australia's most recognisable art styles and has been the home of some of Australia's most successful artists.	Worrorra, Jarrakan, Bununban and Nyulnyulan are the four main language groups, from which there are around 30 languages	1,347 artists in a population of 4,877	Eight Art Centres, four of which are among Australia's largest and highest profile centres, all with similar operating models and histories. Six have shops and/or galleries, complementing an exhibitions program and commercial gallery partnerships that are national and international in scope.	Ochre and acrylic paintings, printmaking, carved or painted boab nuts, emerging digital art

REGION	MAIN LANGUAGE	ARTISTS	ART CENTRES	ART
THE OUTBACK The Outback art region encompasses a huge area of western New South Wales, western Queensland and central South Australia.	Kalkadoon, Kokatha, Mirning and Barkindji	224 in a population of 1,417	One Art Centre and three art projects, each with some form of shop, gallery or marketing. There is no industry recognition and only limited commercial interest in artists from this region.	Acrylic paintings, carvings, fibre, printmaking
TIWI The Tiwi art region encompasses two large islands north of Darwin: the Tiwi Islands of Bathurst Island and Melville Island.	Tiwi	450 in a population of 2,345	Three Art Centres, all with gallery/retail space and all partnered with commercial galleries. Tiwi art has an established and long-term place in the Aboriginal and Torres Strait Islander art sector. Art and artists from the Tiwi Islands have figured prominently in the history, development and success of the sector. The Tiwi Art Centres own a marketing initiative, Tiwi Art Network (TAN), based in Darwin, which assists with marketing, promotion and advocacy.	Ochre painting on canvas, paper, poles and found materials; significant work with fabric and textiles; carvings, weavings, sculpture, ceramics
TORRES STRAIT ISLANDS The Torres Strait Islands encompass the islands off the northern tip of Cape York, Queensland. There are more than 200 islands in the region, with 17 communities/townships on 16 of these islands.	Meriam Mir, Kalau Lagau Ya	314 in a population of 3,009	Three Art Centres and a regional centre, Gab Titui Cultural Centre, which coordinates some art services. The Art Centres have all been established since 2007, triggered in part by funding under Queensland's new Backing Indigenous Arts program; all have display areas. Art from this region has achieved some limited recognition.	Carvings, fabric, printmaking, and bronze sculpture in Australia's most northerly foundry on Badu Island
WEST COAST The West Coast region is a large area of Western Australia and encompasses a variety of physical, social and cultural sub-regions.	Yamaji, Wongai (Wankai), Badimia and Yindjibarndi	477 in a population of 7,469	Seven Art Centres (several set up since 2007), with great variability in size and history; all have galleries or retail areas. Some Art Centres have created strong partnerships with resource companies. The region has few recognised artists and a limited industry profile.	Acrylic paintings, fibre/weavings, carvings
WESTERN DESERT The Western Desert region in the Northern Territory and Western Australia includes the Tanami, Great Sandy, Little Sandy, Great Victoria and Gibson Deserts.	Martu Wangka, Kukatja, Warlpiri and Ngaanyatjarra	6,316 in a population of 8,118	Eighteen Art Centres, many with a gallery space; four have galleries in Alice Springs or at Yulara/Uluru, and seven of the Art Centres have formed a marketing project: Western Desert Mob (WDM). A high proportion of Australia's leading Aboriginal artists are from the Western Desert region. They feature prominently in the commercial art market. Art from this region is arguably the leading contributor to the national and international success and profile of Aboriginal and Torres Strait Islander art.	Acrylic paintings, carvings *(punu)*, weaving *(tjanpi)*, objects, sculpture, printmaking, digital arts



THE ART CENTRES

Art Centres are central to the social, cultural and economic wellbeing of many Aboriginal and Torres Strait Islander artists, especially in remote areas. They connect people and unite community, providing rich opportunities for intergenerational learning. Art centres can also provide a bridge to the wider world and a place to find out about its resources; they provide a central, responsive place in which people can interact and organise their lives. In the absence of the services and options taken for granted in less remote, better-serviced parts of Australia, Art Centres create multiple forms of value.

Art Centres in remote Australia that are owned/operated by Aboriginal or Torres Strait Islander people provide a range of artistic, cultural and entrepreneurial services to a group of artists. They are complex, hybrid organisations. At their nucleus is studio space, where artists access art materials and support and make art. Business operations include wholesale, retail and online, as well as diversifications into new areas such as licensing and collaborations with fashion designers, architects and more. Art Centres document artworks and the lives of artists as well as promoting and selling the artworks. They also develop new ideas for art, art products and ancillary activities.

Beyond this, Art Centres provide mentoring and training and support a variety of cultural maintenance and social activities. Crucially, Art Centres also give wide-ranging assistance to artists and their families in negotiating financial and social matters and helping them to connect with the wider world.

The role of Art Centre managers is decisive, but also highly complex. Job demands range widely, and tasks often fall outside of official duties. In the face of personal and professional isolation, balancing the requirements of individuals, community, the market and funding agencies can be gruelling. These pressures contribute to a pattern of shorter tenures and a difficult situation for the recruitment and retention of staff.

Art Centres need to consider regulating the number of art products that are released onto the market, critically assessing the price points of their art products and marketing them appropriately.

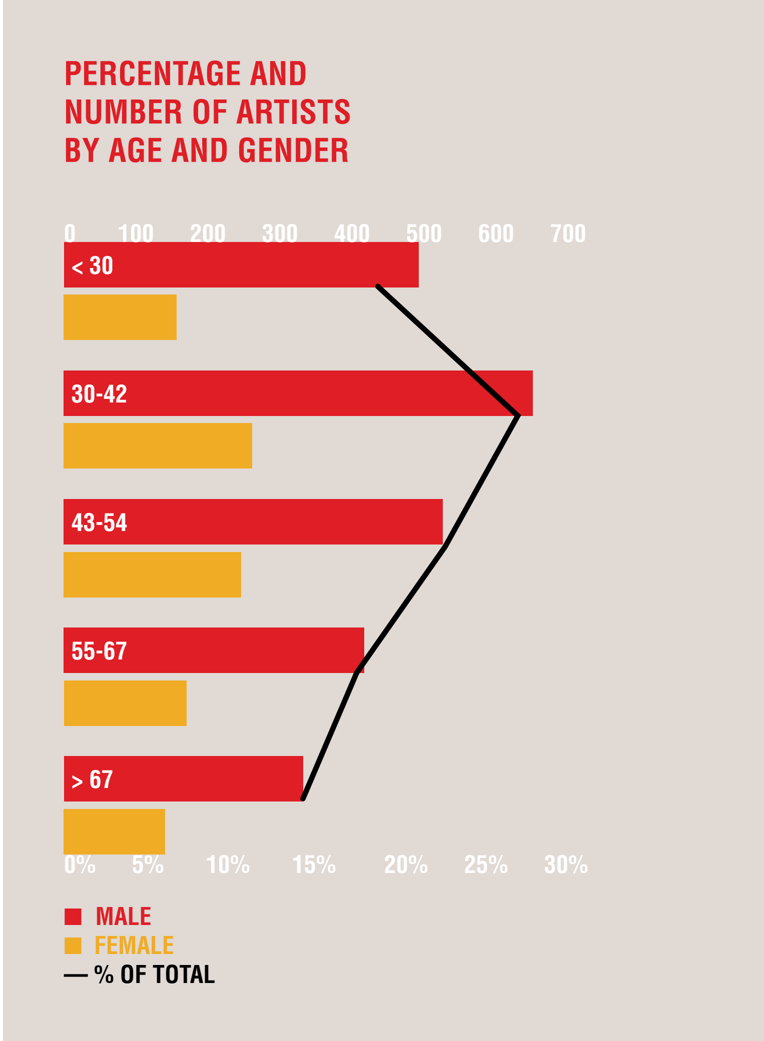
Left: Mabel Wakarta and Nola Taylor, Martumili Artists. Photo by Gabrielle Sullivan

THE ARTISTS AND THEIR ART

Aboriginal and Torres Strait Islander artists draw upon their traditional culture to make art that tells stories, examines history, builds cultural continuity and experiments with materials and ideas. This art passes on knowledge, creates aesthetic experiences and, importantly, reinforces relationships with the land as well as teaching others about it.

Approximately 70% of artists are women, and they produce around 80% of all art products. However, male artists achieve a higher mean value for their artworks. This is because they tend to make a smaller number of lower value products than women do. Male and female artists over 55 years old account for 30% of the artist population and 55% of the value of art sales.

Although all age groups and both genders have had a decrease in sales over the last 10 years, artists over 67 years old – who tend to produce higher value, larger paintings – have had the largest fall in income, with their average sales price dropping by over 50%. This may mean that the market for large, expensive works, often state galleries in Australia or serious collectors, has been saturated by the work of particular artists or art regions. Also, many Australian institutions have reduced allocations for acquisition. Negative press about unethical dealing, fake artworks and economic uncertainty is also a factor.



In recent times, both private and public art businesses have found it hard to make a profit from the sale of Aboriginal and Torres Strait Islander art.

Left: Gwenda Namatjira from Ngurratjuta Iltja Ntjarra Art Centre. Photo by Iris Bendor
Right: While paintings dominate, carving and weaving are important artistic practices.

THE ART VALUE CHAIN

The art value chain is the interlinked relationships and transactions between Aboriginal and Torres Strait Islander artists, agents and audiences.

This chain includes artists, government agencies that fund public art businesses, Art Centres, public and private art businesses selling Aboriginal and Torres Strait Islander art both in Australia and internationally and those viewing or buying the art.

The valuing of art is complex. Cultural, intercultural, fashion, historical and discretionary perceptions all play a part. Why one artwork is favoured over another artwork or why one artist is considered more highly than another cannot be reliably predicted. The volatility that these factors engender in the business of art can be daunting and is compounded by the isolation of many artists and Art Centres, which reduces their ability to understand and adapt to market signals.

Quality control is important. Variability in quality and lack of consistent documentation of provenance and standardised certificates contribute to negative perceptions of Aboriginal and Torres Strait Islander art and undermine the integrity of the 'brand'.

The art ranges from very expensive fine art to low-priced merchandise using designs from Aboriginal and Torres Strait Islander culture. The art can be paintings, sculpture, prints, textiles and new media. The merchandise can be stationery, homewares, posters, jewellery, toys, clothing and trinkets. The large majority (90%) of art products made are sold for less than $1,000.

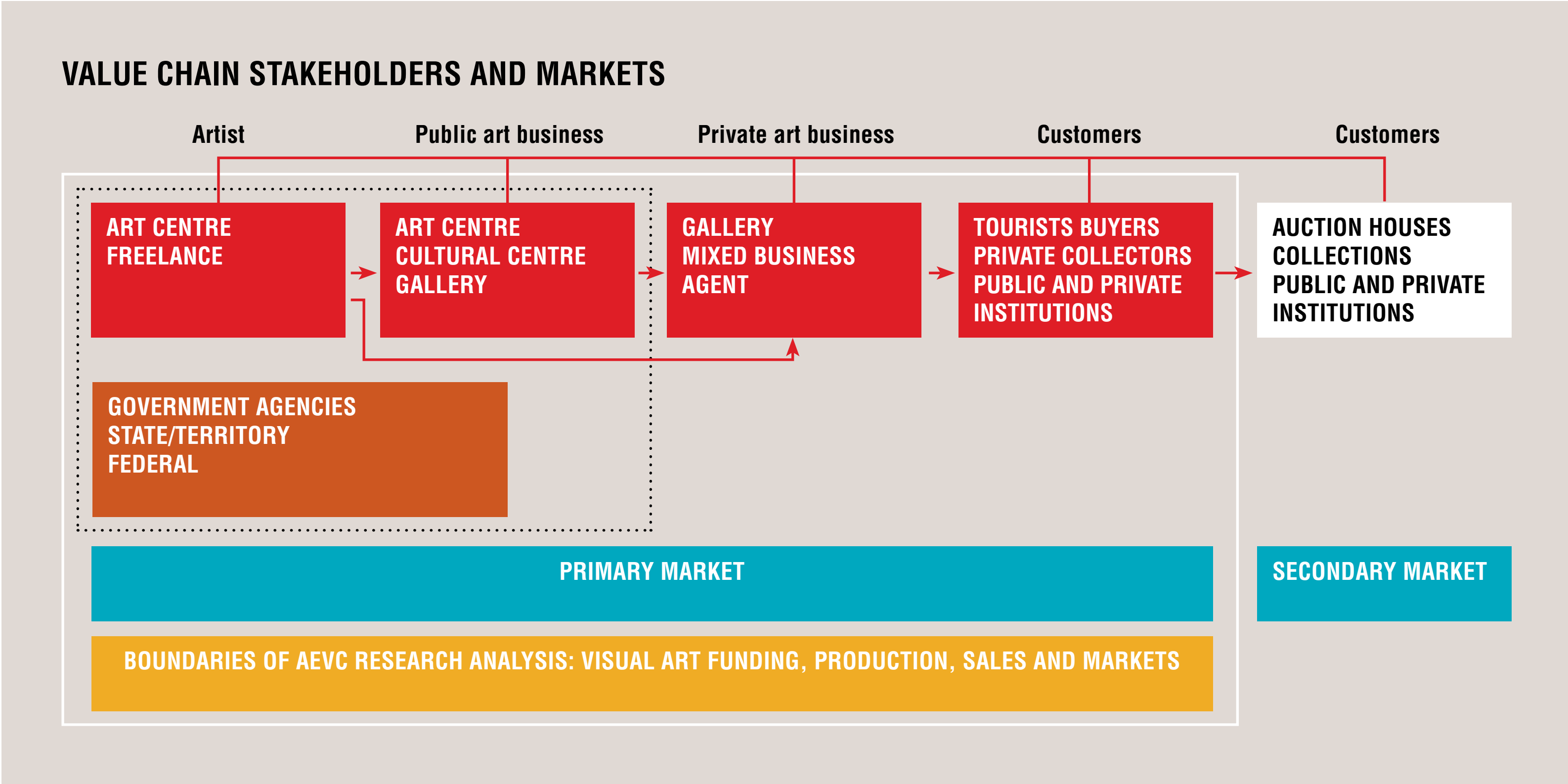
Product development is time-consuming and expensive. More communication and interaction between private art businesses and Art Centres can enable more timely and informed responses to market and product development opportunities. Art Centres reported the benefits of site visits from business owners to get to know artists, their region and their art.

The research indicates that public and private art business owners and managers are in business for more than economic returns. Many demonstrate extensive knowledge of and passion for Aboriginal and Torres Strait Islander art.

Public businesses have done better than private businesses, several of which have closed.

The current scale of art production is higher than market demand.

Left: Customers at the Revealed Marketplace; such fairs are now a major part of the sector.



The main purchasers of Aboriginal and Torres Strait Islander art are Australian private buyers from New South Wales or Victoria. The increase in sales to private buyers has been attributed by some businesses to successful exhibitions and art fairs that increase knowledge of and exposure to Aboriginal and Torres Strait Islander art.

While Aboriginal and Torres Strait Islander art has a high profile in public and private art collections in Australia, nearly 50% of Australian buyers are private buyers, not art collectors.

In the period 2011–13, modest growth in sales occurred in some art regions. Most sales are of fine art products, and art merchandise made up 9% of total sales.

Further growth in sales to Australian and international tourists is anticipated. Europe and North America are the main international markets, with Australian art businesses predicting some growth in North America and Asia. However, the 12 international art businesses surveyed expected further growth in Europe and a decrease in North America.

Private art businesses are focusing on international marketing through websites and exhibitions and selling to institutional collections.

Important factors for buyers are aesthetics and price, followed by ethical sourcing and quality of craftsmanship. Providing quality documentation of provenance is critical even for small, inexpensive works.

An ongoing problem is that provenance and certification are inconsistent and undermine the ‘brand’. Quality provenance is a key selling point for most buyers.

The ‘brand’ needs to be better managed to maintain market value and to develop new markets.

FUNDING

Government funding of Art Centres is highly effective, supporting and providing wide-ranging, sustained benefits to over 90% of Aboriginal and Torres Strait Islander artists in remote Australia.

In 2012/13, $26.1 million was distributed among 87 Art Centres. A quarter of funding to this sector is for peak bodies and industry development. The increase in State/Territory government funding after 2006/07 is partly due to funding data becoming more representative. The large increases in 2007/08 and 2008/09 are from the Backing Indigenous Arts (BIA) program in Queensland and, in particular, the infrastructure funding received by NT Art Centres and peak bodies from the Aboriginal Benefits Account (ABA) in 2008/09. The doubling of Federal funding in 2009/10 marks the start of the Indigenous Employment Initiative (IEI). The IEI funding offset the plateau in State government contributions after 2010/11.

At present, almost all Art Centres are dependent on government funding. Income from grants exceeds income from sales in 60% of Centres. This is a growing trend: in the 1980s and 1990s, Aboriginal art sales were growing consistently, before the market bubble of the mid-2000s. But in the last 10 years there has been a 126% fall in the retained earnings of an average Art Centre, yet a 44% increase in production. This and other results from the value chain study highlight the need for change and adaptation in Art Centres.

However, there are also significant risks in assessing Art Centres on financial measures alone. For example, one key aim of Art Centre subsidy is to support artists through long artistic apprenticeships, necessary to achieving critical and commercial success. Encouraging and mentoring younger artists is important in sustaining the production base. While high-level success is not realistic for the majority of artists, all these artists can, alongside any artistic success, learn new skills and access professional development, training and potential employment. In addition, the wider role of Art Centres in being a conduit to the world beyond the community means that they are significant in developing human, social and financial capital. There are, therefore, a range of outcomes beyond sales income that need to be acknowledged when considering the efficacy of Art Centre funding and operations.

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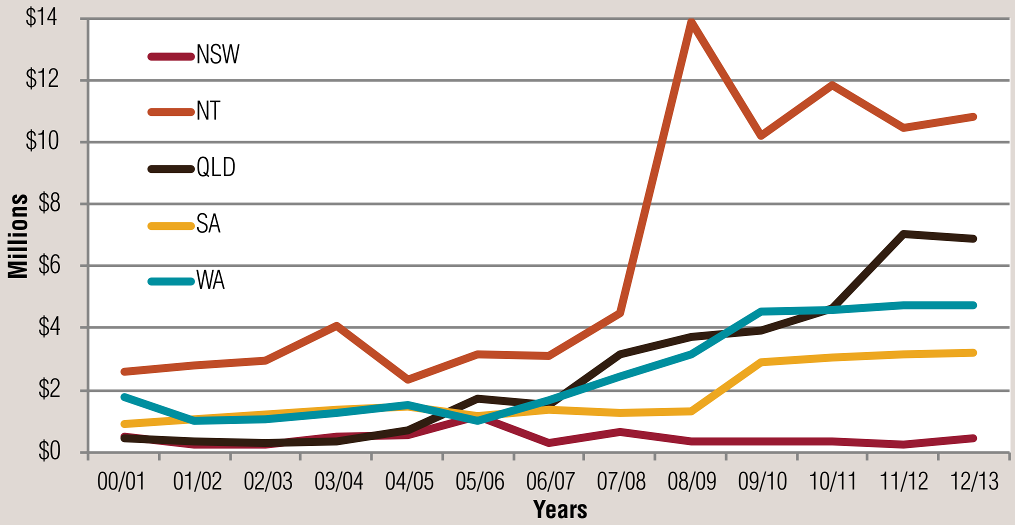
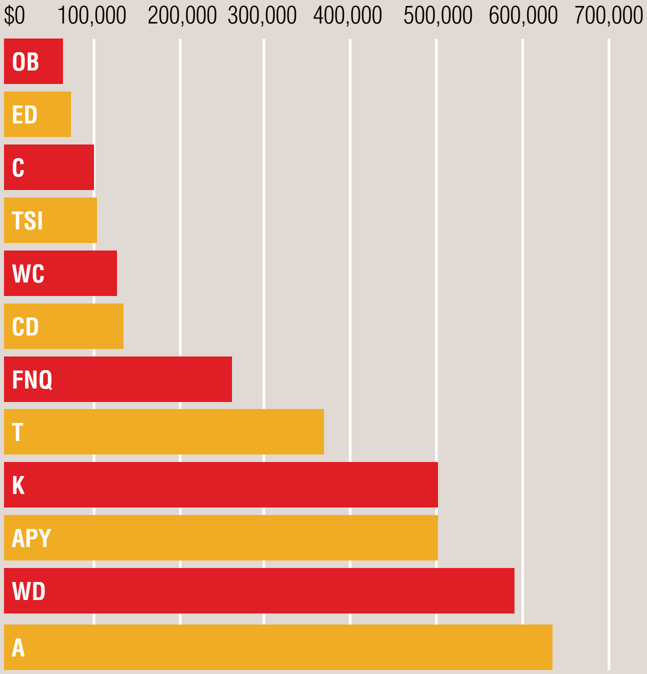
FUNDING OVER TIME – ALL AGENCIES



Left: Graffiti in Patjarr. Photo by Tim Acker

SALES

MEAN SALES FOR EACH ART REGION RANKED IN ORDER OF SALES



A = Arnhem **APY** = Anangu Pitjantjatjara Yankunytjatjara
C = Central **CD** = Central Desert **ED** = Eastern Desert
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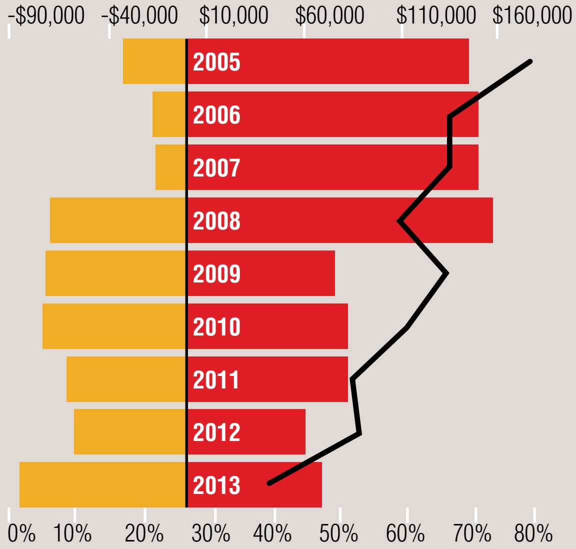
ART CENTRE PROFIT, LOSS AND RETAINED EARNINGS



MEAN PROFIT
MEAN LOSS
— % ART CENTRES WITH A RETAINED PROFIT

More than three-quarters of all Aboriginal and Torres Strait Islander art products purchased by private art businesses were made in remote locations. The Western Desert and the Central Desert were the most popular regions. Most people purchased art products from Art Centres, but 37% of artworks were purchased direct from artists.

Fewer than 20 of the largest Art Centres account for 70% of all sales in remote Australia. One-third of Art Centres make less than $150,000 annually in sales.

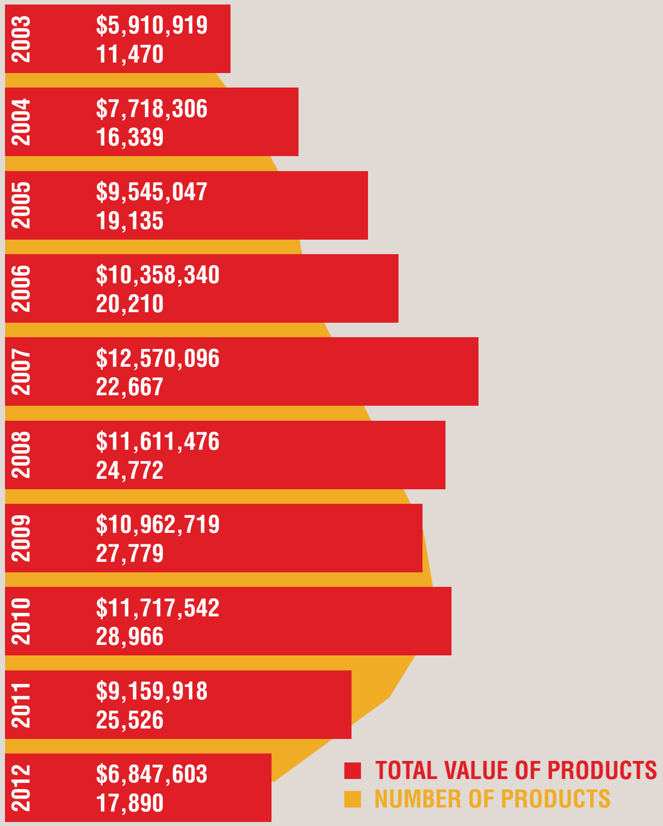
Four major art regions dominate: Arnhem Land, Anangu Pitjantjatjara Yankunytjatjara, Kimberley and Western Desert. Together, these regions encompass almost half of all Art Centres, service 75% of artists, receive almost half of all funding and generate over 80% of all sales. The corollary is that the other half of the Art Centres, representing almost 4,000 artists, are generating less than 20% of sales.

Between 2003–07 and 2008–12, Art Centres recorded a $6 million increase in sales value and produced 40,000 more art products. The increased sales are due to the larger number of products, not an increase in the individual value of art products.

However, analysis indicates there were over 60,000 art products produced but not sold between 2003 and 2012. While production levels have fallen in the last two years, they appear to still be significantly above the level of sales. Together with other contributing evidence such as the increasing length of time art products are in stock, this indicates a continuing over-supply problem.

Nearly two-thirds of all art products made by Art Centres were in the under $250 price range – and almost 90% were under $1,000. Art products over $5,000 in price made up only 1.1% of all products, though they generated over 20% of Art Centre sales. The

PRODUCT SALES NUMBERS AND VALUES, 2003–2012

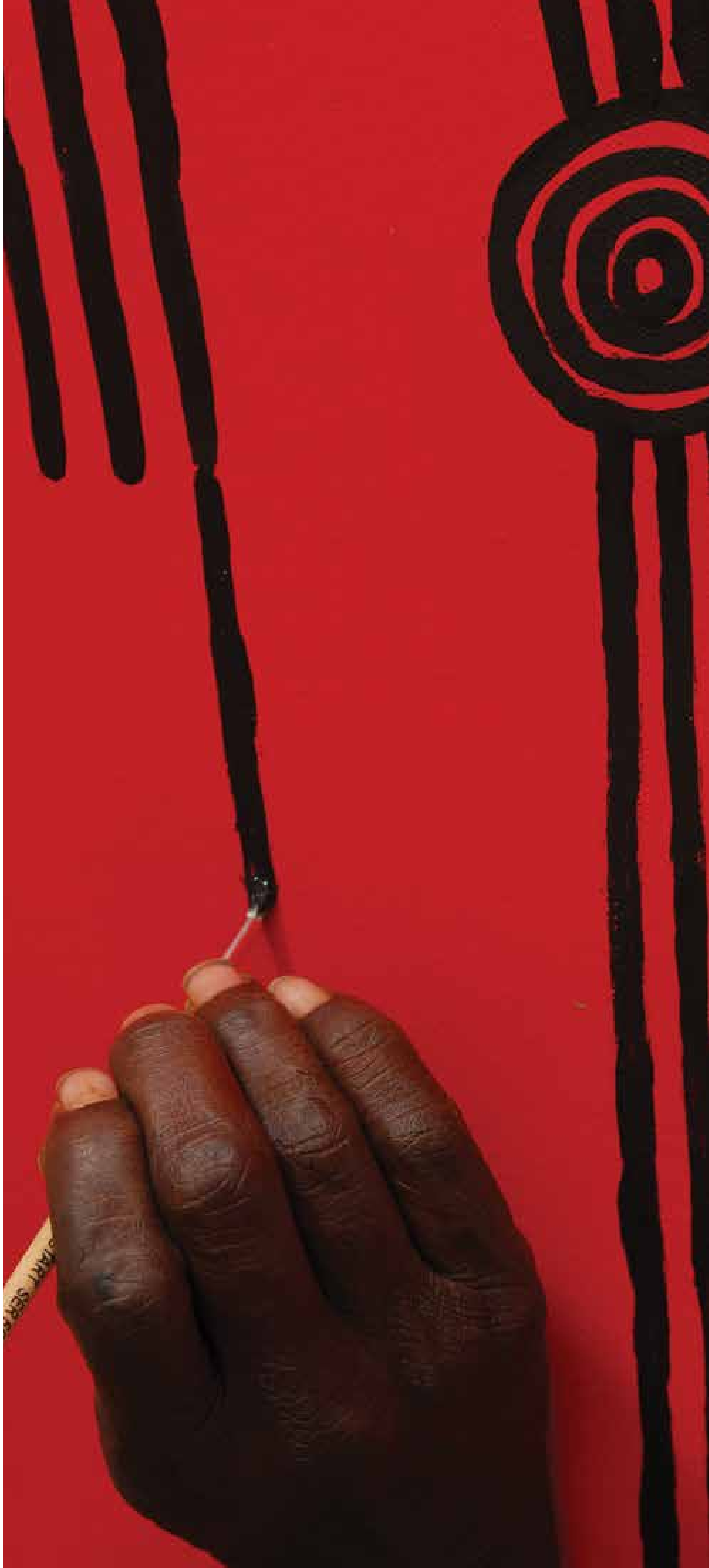


dominance of paintings is also important to note; while they represent about two-thirds of all art products made, they generate 90% of all sales.

It is likely that a combination of over-supply; buyer interest shifting to smaller, lower priced works; and overall market conditions have contributed to a long-term decline in the average price of art products. This is particularly noticeable in the average price of paintings, with a steady decline in the average price from a 2005 high of $885, to almost half that by 2012, of $449.

Although there is a perception that the art market is dominated by expensive masterworks, most buyers prefer smaller, portable and accessible art products.

Right: Artist at work, Tjarlirli Art. Photo by Tim Acker



EMPLOYMENT

Since 2009/10, the mix of Federal government funding has changed from supporting art production to having an equal focus on employment. Even small Art Centres have become 'employment agencies'. Consequently, salaries are now the largest outlay for most Art Centres.

Since 2010/11, 57% of Art Centres pay more in wages than in artist payments, compared to 29% before. This increase has meant that the roles of many Art Centres have changed from being art studios to becoming more focused on employment, training and community activities. Previously, most Art Centres had one or two paid positions and all artists were self-employed. Some Art Centres now employ up to 10 extra people part time, while some artists are now salaried.

POLICY SETTINGS

There are three policy settings implemented after 2008: the Resale Royalty Scheme, changes to self-managed superannuation funds, and development of an Indigenous Australian Art Commercial Code of Conduct. These have all affected the Aboriginal and Torres Strait Islander art sector.

Art businesses criticised the Resale Royalty Scheme for its limitations regarding distribution of funds, particularly in regard to deceased estates and unknown artists. Art Centres were less dissatisfied than private businesses. Changes to self-managed superannuation funds have discouraged investment, because artworks need to be kept in storage, insured, and valued annually. The Indigenous Art Code, while appreciated by many, is considered to lack discrimination and focus. Respondents suggested that the Code could be better used in establishing standard provenance documentation.

New market opportunities and partnerships can be developed through research, education and changes to government policies.

CHALLENGES AND OPPORTUNITIES

Aboriginal and Torres Strait Islander art has a significant place in Australian culture. Its success depends on a network of artists, Art Centres, peak bodies and art businesses and on the support of funding agencies.

Clarifying the challenges and opportunities facing the Aboriginal and Torres Strait Islander art sector is a purposeful step towards a sustainable place in the economy for Australia's first peoples living in remote regions.

It is important to recognise the success of the art sector: while the economic scale of the sector is small in relation to mining, agriculture and various service sectors in remote Australia, Aboriginal and Torres Strait Islander visual art is a large part of our cultural landscape and is exhibited in numerous private and institutional collections and international galleries. It adorns the homes of international and local tourists, creating a talking point and a lasting connection to remote Australia. It is a crucial point of exchange between Aboriginal and Torres Strait Islander Australia and non–Aboriginal and Torres Strait Islander Australia.

This enviable record can only continue if we support public and private art businesses and improve the connections between artists, agents and audiences. This will involve better-targeted policies responding to local circumstances, reducing barriers to private and institutional buyers, enabling innovation and product development and improving quality assurance systems across the art value chain.

Industry respondents believe there is potential for growth, particularly in the local and international tourist markets. There are some recent signs of sales growth.

The majority of art businesses want greater support to develop new market opportunities and partnerships and can see the advantages of improved cooperation and communication.

Art Centres are extremely varied in their size, productivity and remoteness; funding and management arrangements need to reflect this diversity. Greater sector coherence may be achieved through benchmarking and accreditation.

CHALLENGES

- Improve quality of artworks, documentation, marketing and presentation.
- Avoid over-production, but balance this against the need to attract and inspire artists, encouraging experimentation and excellence in their practice.
- Respond to the market with product and marketing innovation, and create more effective commercial partnerships.
- Discriminate between art made for cultural and community maintenance and that made for the professional, fine art market.
- Better articulate, calibrate and enforce the priorities of remote area funding for art, culture and enterprise, so that funding is better matched to the actual services provided by Art Centres and to the growing differences in the way Art Centres operate.

OPPORTUNITIES

- Develop more effective commercial partnerships in Australia and internationally.
- Work on new products, new markets and new approaches to marketing.
- Retain the prominent place of Aboriginal and Torres Strait Islander art in Australia's creative landscape by encouraging and mentoring younger artists and nurturing artistic innovation.
- Sustain a global brand with an ongoing reputation for excellence and authenticity.

APPENDIX

LIST OF ART CENTRES

ART REGION	NAME OF PUBLICLY FUNDED ART BUSINESS	STATE/ TERRITORY
A	Buku Larrnggay Mulka Centre	NT
A	Bula'bula Arts	NT
A	Gapuwiyak Culture & Arts	NT
A	Injalak Arts	NT
A	Maningrida Arts & Culture	NT
A	Milingimbi Art & Culture Centre	NT
APY	Ernabella Arts	SA
APY	Iwantja Arts & Crafts	SA
APY	Kaltjiti Arts & Crafts	SA
APY	Mimili Maku Arts	SA
APY	Ninuku Arts	SA
APY	Tjala Arts	SA
APY	Tjungu Palya	SA
C	Barkly Arts (BRA)	NT
C	Epenarra Artists (BRA supported)	NT
C	Kulumindini Arts (BRA supported)	NT
C	Djilpin Arts	NT
C	Durrmu Arts	NT
C	Nyinkka Nyunyu Art & Culture Centre	NT
C	Merrepen Arts, Culture & Language	NT
C	Mimi Aboriginal Art & Craft	NT
C	Ngukurr Arts	NT
C	Waralungku Arts	NT
CD	Hermannsburg Potters	NT
CD	Keringke Arts	NT
CD	Ngurratjuta Iltja Ntjarra Art Centre	NT
CD	Mwerre Anthurre Artists (Bindi Inc.)	NT
CD	Tangentyere Artists	NT

ART REGION	NAME OF PUBLICLY FUNDED ART BUSINESS	STATE/ TERRITORY
CD	Tapatjatjaka Art & Craft	NT
CD	Tjuwanpa Resource Centre	NT
CD	Waltja Tjutangku Palyapayi	NT
CD	Yarrenyty Arltere	NT
ED	Arlpwe Art & Culture Centre	NT
ED	Artists of Ampilatwatja	NT
FNQ	Girringun Aboriginal Art Centre	Qld
FNQ	Hope Vale Arts Centre	Qld
FNQ	Lockhart River Art Centre	Qld
FNQ	Mornington Island Arts	Qld
FNQ	Pormpuraaw Art Centre	Qld
FNQ	Wei'num Arts	Qld
FNQ	Wik & Kugu Arts & Craft Centre	Qld
FNQ	Wujal Wujal (Bana Yiriji)	Qld
K	Bidyadanga Artists	WA
K	Mangkaja Arts	WA
K	Mowanjum Art & Culture Centre	WA
K	Waringarri Aboriginal Arts	WA
K	Kira Kiro (Waringarri supported)	WA
K	Warmun Art Centre	WA
K	Yarliyil Art Centre	WA
K	Laari Gallery	WA
OB	Ceduna Arts & Cultural Centre	SA
OB	Coober Pedy Artists	SA
OB	Outback Arts	NSW
OB	Bynoe Arts & Crafts	Qld
T	Jilamara Arts	NT
T	Munupi Arts	NT

ART REGION	NAME OF PUBLICLY FUNDED ART BUSINESS	STATE/ TERRITORY
T	Tiwi Design	NT
TSI	Badhulgal Kuthinaw Mudh Art Centre	Qld
TSI	Erub Erwer Meta Art Centre	Qld
TSI	Gab Titui Cultural Centre	Qld
TSI	Ngalmun Lagau Minaral Art Centre	Qld
WC	Gwoonwardu Mia	WA
WC	Laverton Leonora Cross Cultural Centre	WA
WC	Roebourne Art Group	WA
WC	Spinifex Hill Artists	WA
WC	Wirnda Barna Artists	WA
WC	Yamaji Art	WA
WC	Yinjaa Barni Artists	WA
WD	Ikuntji Artists	NT
WD	Irrunytju Arts/Minyma Kutjarra	WA
WD	Kayili Artists	WA
WD	Martumili Artists	WA
WD	Maruku Arts & Crafts	NT
WD	Papulankutja Artists	WA
WD	Papunya Tjupi Arts	NT
WD	Papunya Tula Artists	NT
WD	Spinifex Arts Project	WA
WD	Tjanpi Desert Weavers	NT
WD	Tjarlirli Art	WA
WD	Tjukurba Art Gallery	WA
WD	Walkatjara Art Uluru	NT
WD	Warakurna Artists	WA
WD	Warburton Arts Project	WA
WD	Warlayirti Artists	WA
WD	Warlukurlangu Artists	NT
WD	Warnayaka Art & Culture	NT

CLOSED ART CENTRES		
A	Anindilyakwa Arts & Cultural Centre	NT
A	Elcho Island Arts & Crafts	NT
A	Mardbalk Arts and Crafts	NT
A	Julalikari Arts	NT
C	Jirruwan Artists	WA
K	Ngaruwanajirri Artists	NT
T	Watiyawanu Artists	NT
WD	Yaruman Artists	WA

A = Arnhem **APY** = Anangu Pitjantjatjara Yankunytjatjara **C** = Central
CD = Central Desert **ED** = Eastern Desert **FNQ** = Far North Queensland
K = Kimberley **OB** = Outback **T** = Tiwi **SI** = Torres Strait Islands
WC = West Coast **WD** = Western Desert

LIST OF REPORTS FROM THE ART ECONOMIES VALUE CHAIN STUDY

Woodhead A and Acker T. 2014. *The Art Economies Value Chain reports: Synthesis.* CRC-REP Research Report CR004. Ninti One Limited. Alice Springs. http://www.crc-rep.com.au/resource/CR004_AEVC_Synthesis.pdf.

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Acker T and Woodhead A. 2014. *The Art Economies Value Chain reports: Art Centre finances.* CRC-REP Research Report CR006. Ninti One Limited. Alice Springs. http://www.crc-rep.com.au/resource/CR006_AEVC_ArtCentreFinances.pdf.

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Left: The evolution of painting, as artists work on new mediums – in this case tin cups. Photo by Tim Acker

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Principal Research Leader Tim Acker is based at Curtin University, Western Australia.

Senior researcher Dr Alice Woodhead is based at Southern Cross University in Lismore, New South Wales.

For additional information contact:
Ninti One Limited, Communications Manager
+61 8 8959 6000
www.nintione.com.au

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