

Тернопільського театру, але й дає змогу оцінити досягнення інших театрів. Він є не лише свідченням високої культури, а й здатний задовольнити потреби глядача, який завдяки цьому фестивалю має змогу духовно та культурно збагатитися.

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РОЗВИТОК АРТ-РИНКУ В КИТАЇ: ІНСТИТУЦІЙНА СТРУКТУРА У КОНТЕКСТІ «НОВОГО ШОВКОВОГО ШЛЯХУ»

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DEVELOPMENT OF THE ART MARKET IN CHINA: INSTITUTIONAL STRUCTURE IN THE CONTEXT OF THE “NEW SILK ROAD”

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In the context of promoting the Chinese cultural industry and art market in countries along the 'new silk road', China's cultural management institutions (from the central and regional governments to art associations and business entities) view the fine arts as an important component of the national culture. Fine arts play a significant role in preserving national identity and in shaping society's spiritual and aesthetic values. It is only once this has been recognised

that artistic creativity is considered an important economic factor in the industry and the main driver of the market promotion along the “road” [1].

Following the 18th CPC Congress in 2012, the country's cultural industry received increased institutional and financial support and underwent technological renewal and the dynamisation of innovative processes. The industry's overall scale has grown constantly, and its industrial structure has gradually become more modern and optimised. The impetus for developing new business formats from governments and associations has strengthened considerably, with these entities now looking to explore new opportunities in this area.

Guided by the ministry of culture and tourism, the transformation of traditional tourism methods and business formats has resulted in a variety of high-quality cultural products and services. This has stimulated cultural consumption among urban and rural residents and introduced significant Chinese cultural products to the international markets along the “new silk road”[2].

At official and social levels in China, efforts are being made to ensure that a civilised, modern art market becomes the leader of the country's professional art, both domestically and internationally. This is particularly important in the context of the 'One Belt, One Road' project. Thanks to policies implemented by state and regional governments, the size of the art market is constantly expanding. In 2018, its volume exceeded 300 billion yuan, making it the largest in the world in terms of growth rate (19–24% annually). [3].

The cultural industry that form the foundation of the art market support sustainable development. The overall scale of the cultural industry is constantly expanding, and the strategy of cultural digitalisation is making significant progress. It has gradually entered a new stage of comprehensive improvement, progressing from the initial stages of research, launch and cultivation to getting fruitful results. In 2000s – early 2020s the industry's overall economic volume has maintained rapid growth. In 2004, the added value of the national culture and related industries was 344 billion yuan. This figure increased to 5,378.2 billion yuan in 2022 — a 14.6-fold increase. The added value of the cultural and related industries accounted for 4.46% of GDP in 2022, up from 2.13% in 2004. From 2004 to 2022, the cultural industry's average annual contribution to GDP growth was 4.8% [4].

China was ranked third in the world, achieving sales of \$8.4 billion and securing a 15 per cent share of the market.[5]

The industry has accelerated its coordinated development, optimising its industrial layout and establishing the cultural service industry as the main driver of its growth. In 2012, the added value of the cultural services sector accounted for 53.3% of the total added value of the cultural and related industries, rising to 65.4% by 2022. From 2012 to 2022, the cultural service industry contributed 71.5% to the added value of the cultural and related industries. [4].

The report of the 20th National Congress of the CPC (2018) proposed to “implement a national strategy for the digitalization of culture” to promote the

deep integration of culture, science and technology and further strengthen the strategic supporting role of scientific and technological innovation in the development of the cultural industry. The investment in research and development (R&D) of cultural production enterprises above a certain size nationwide increased from 26.7 billion yuan in 2012 to 57.7 billion yuan in 2022, with an average annual growth rate of 8.0%; the proportion of operating income of cultural production enterprises above a certain size will increase from 0.86% in 2012 to 1.33% in 2022. [4]

Other related national strategies and policies specific to the culture industries and trade are:

Document title	Institutions in charge
Opinions on Promoting High-quality Development of Foreign Cultural Trade	Ministry of Culture and Tourism, Ministry of Commerce
Opinions on Promoting Rural Revitalization Enabled by Cultural Industries	Ministry of Culture and Tourism, Ministry of Commerce
Opinions on Promoting the Implementation of the National Culture Digitization Strategy	Ministry of Culture and Tourism, Ministry of Commerce
Opinions on Promoting the Highquality Development of National Cultural Industrial Parks	Ministry of Culture and Tourism, Ministry of Commerce
14th Five-Year Plan for Tourism Development (2021-2025)	Ministry of Culture and Tourism, Ministry of Commerce

Source: [8]

The continuous promotion of the national digitalisation strategy for culture has yielded fruitful results in terms of scaling up. In 2023, actual investment in the national radio and television audio-visual industry parks was 57.98 billion yuan, with operating income reaching 165.83 billion yuan — an 81.5% and 88.1% increase respectively compared to 2020, representing an average annual growth rate of 22.0% and 23.4% respectively. [4].

However, there are still some challenges to the development of the country's cultural industry. The 18th Congress of the Communist Party of China (2012) stated that the current achievement is 'faith in culture', indicating that forming the art market is a complex, long-term process.

When comparing China's "art economy" with the art markets of Europe and America, which have been developing for centuries, Chinese cultural leaders emphasise the differences. This is because the market economy in the PRC is imperfect, meaning that all markets — economic and cultural alike — are still in the process of development. This is why the value of China's art market, including that in Hong Kong, fell by 31% in 2024, reaching \$8.4 billion — the lowest level since 2009. This significant decline was part of a global

slowdown, though China was hit hardest among major markets (sales in the U.S. fell 9% by value year over year; in China they fell 31%, while in France declined 10%, Germany 4%, Italy 10% and South Korea 15%). The downturn was driven by factors like a sluggish high end and a general decline in economic sentiment, which impacted collector spending. [6].

The Chinese art market is still in its infancy despite some traditional cultural industries, such as creative design, arts and crafts, performing arts, the entertainment industry, the animation industry, the cultural exhibition industry, and cultural equipment manufacturing, have formed a relatively complete industrial chain. However, they are not strong enough, do not provide enough original products, and performing arts collectives need to be reformed more deeply. New cultural industries, such as online audiovisual media, e-sports, immersive cultural leisure, and digital entertainment, are developing rapidly. However, improvements are needed in terms of content quality, service levels, intellectual property protection, and development standardisation. [2]

There is a shortage of talent management in new business sectors. For instance, the issue of 'small and weak' cultural enterprises is highly visible. Some cultural enterprises lack market awareness and are insufficiently competitive, placing them too heavily dependent on state funding. Insufficient financial support makes it difficult for cultural enterprises to survive in the long term and for project credit financing to spread.

However, despite China's economic problems and the slowdown in economic growth to 5% in 2024, the domestic art institutions have developed quite actively in recent years. Notably, the number of galleries, auctions and exhibitions has increased, as has demand for national art, including at the international level. This has been facilitated by state policies aimed at supporting the professional development of domestic artists working in sculpture, painting, graphics and decorative arts. Consequently, the number of art museums and galleries in China increased by 7% in 2017, reaching 4,079 institutions. [3].

It should be noted that the distribution of art museums and galleries in China is highly uneven. For instance, Beijing had around 2,400 such cultural institutions in 2017, while Shandong had approximately 1,000 and other provinces had fewer than 1,000. Beijing saw the largest increase in the number of galleries, with almost a thousand more, while Shanghai, Guangdong, Zhejiang and Jiangsu provinces saw numbers double (Huang Jun, 2018). The volume of sales at art auctions is growing rapidly. Stock market capacity is around 100 billion yuan, and museums and galleries have already achieved a turnover of over 35 billion yuan. Around 500 business entities are operating continuously as registered participants in auctions. Sales volumes of paintings, sculptures, drawings, photographs and woodcarvings are growing by tens of percent annually. The Fine Arts Investment Fund and the Painting Fund are facilitating the development of the auction market by playing an increasingly active role in the art market. Although they have regional branches, in terms of the volume of operations they are still in their infancy. Online trading of works of art is growing rapidly and is considered a new growth driver for the art

market as a whole. According to existing forecasts, this market segment could generate an annual turnover of around 7 billion yuan over the next ten years. [7].

Despite some suspension of the extremely high rates of increase in prices for works of art observed during 2012-2015, the growth subsequently increased to 14-15%, and the average statistical price of one work of traditional or modern art sold at auction in recent years is 1 million yuan in 2017. [3]. Prices for works of art of Chinese classics are growing especially rapidly, compared to the level of a decade ago. Thus, the work of the founder of Chinese painting Qi Baishi "Eagle Standing on a Pine Tree" was sold for a record amount of 425.5 million yuan. [7].

Before the epidemic, the volume of transactions and prices for works of modern fine art were increasing. Although the first place was taken by works of traditional Chinese painting "guohua", modern painting is also progressing rapidly and has taken second place in the market. In some periods, the demand for works of European classical art, especially Eastern European painting, has increased, but it is gradually being replaced by purely Chinese painting from the market. [3] According to the China Art Market Analysis Association, the most profitable gallery was the Beijing Boers-Li Gallery, located in the 798th art zone of Beijing, whose fortune has been growing by 20 million yuan every year in recent years. The Association has developed a gallery income index, which shows that 24% of galleries have a profit above average, 74% - average, and 2% of galleries have a minimum profit or are unprofitable [7].

An analysis of participants and buyers of fine art works at auctions sessions conducted by auction houses in 2021 shows that the largest volume of transactions for the purchase and sale of works of art fall on owners of middle-class and corporate collections (owned by collective and other non-state enterprises). At the same time, a significant proportion of art purchases at auction are made by galleries and museums. Public (museum and corporate) collections are replenished with works of a medium to high artistic level, while works in the lower price category are acquired by private individuals and foreign buyers. Over the past 4–5 years, collections have increased by more than 40 billion yuan. Currently, the value and structure of collections are assessed in a standardised way; for this purpose, quantity and value standards have been developed. [2]

Currently, there is a transformation of corporate and home collections into open museums and exhibitions belonging to their owners. The issues of opening such museums are regulated by state and local authorities. [7]

Thus, among the most pronounced trends in the art market institutional building, the following can be distinguished:

Firstly, the Chinese art market is characterized by fierce competition and varying levels of business management quality among companies. In light of the slowing Chinese economy, particularly in coastal regions like Liaoning, Shandong, Hebei, and Tianjin, this competition is becoming more pronounced. Galleries, museums, auction houses, and fine art educational institutions are all battling for attention and market share. Beyond just branding, there is a critical

struggle for talent and resources; effective marketing hinges on showcasing the creativity of artists and the institutions they represent. Furthermore, the influx of artworks in China and the emerging markets along the "new silk road" have intensified the rivalry between domestic enterprises and foreign intermediary organizations. To thrive, companies must adapt and innovate, making strategic partnerships and promoting artistic excellence a priority in this dynamic landscape.

Secondly, as the art market continues to grow and competition escalates, art museums and galleries are increasingly polarized in terms of profitability, sales growth, and access to essential funding from banks and investment firms. The competitive landscape is further complicated by the rise of foreign capital in the Chinese art market. Since the implementation of new legislation in 2008, the market dynamics have shifted considerably, leading to the emergence of galleries that are either fully or partially funded by foreign investors. Notably, this influx of investment is primarily focused on Beijing, Shanghai, and Hong Kong, as these cities offer unparalleled art resources, a conducive business environment, and an abundance of talented artists. Investing in these vibrant art hubs is not just advantageous—it's essential for capitalizing on the growing opportunities within the Chinese art scene.

Thirdly, the emergence of foreign galleries in China has introduced an exemplary model of art management, accompanied by advanced marketing, branding, and auction expertise. This influx, while beneficial in many ways, has also intensified competition to a level that has led to the downfall of weaker local businesses. Such competitiveness is reshaping the landscape, forcing companies to innovate or risk extinction.

Fourthly, the inequitable distribution of the art market across the nation has further marginalized peripheral areas. In contrast, Beijing's galleries have proven their resilience, and their numbers continue to grow, now commanding a bulk of the Chinese art market. Alongside prominent cultural hotspots like the 798 Art Zone, thriving artists' colonies in Caochangdi and Songzhuang, and the recently established art zones in Wangjing and Shunyi, Beijing remains at the forefront. This trend suggests that the gap in gallery development will only widen if left unaddressed. Fifthly, we are witnessing significant advancements in art market regulation. Enhanced communication among participants, the establishment of a comprehensive code of conduct, and improved standards in art management and gallery collaboration signal a positive shift. Driven by proactive market participants, the formation of the Beijing and Shanghai Gallery Associations is a testament to the growing professionalism in the sector. This momentum can contribute to a more equitable and robust art environment for all stakeholders involved. Self-regulatory bodies have significantly enhanced communication among market participants and strengthened ties between the art sector and local cultural departments. These associations have effectively unified previously fragmented initiatives to foster the growth of the art market, particularly during a time of economic slowdown in China. Furthermore, they have elevated the reputation of their members, showcasing the value of

collaboration. Their positive impact extends to facilitating relationships between foreign galleries and domestic partners, proving essential in resolving conflicts and addressing challenges. This collective effort is poised to drive transformative change within the institutional framework of the Chinese art market, paving the way for a more expansive, stable, and robust market with a much larger consumer base.

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ОБРАЗОТВОРЧІ ЗАСОБИ У СТВОРЕНІ ГОРОР-ПЕРСОНАЖІВ

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Ключові слова: горор, деформація, персонаж, форма, художні засоби, образотворче мистецтво.

Жанр горору в образотворчому мистецтві упродовж свого історичного шляху розвитку зазнав численних трансформацій від моменту свого зародження і до сьогодні, проте його парадоксальна популярність залишається тривалою. Людей незмінно приваблює страх і, навіть, жах – емоції, що за своєю природою є негативними та базуються на глибинній інстинктивній природі людини. Зазначимо, що персонажі виступають однією з ключових складових горору, вони стають «обличчям» художнього твору, тим елементом, який не лише привертає увагу